

Managed Print Services, 2024

How MPS is supporting workplace transformation



Executive summary

In today's hybrid work environment, managed print services (MPS) remain a key enabler for driving efficiency, improving security, lowering environmental impact, and enhancing workflow automation. As organisations embrace AI, cloud technology and accelerate their digitisation initiatives, MPS suppliers must deepen their expertise in adjacent technology areas to support the broader transformation that MPS can deliver. This includes document workflow automation, AI-enabled analytics, and intelligent document processing (IDP), which can all improve business outcomes from traditional MPS engagements.

Quocirca's MPS 2024 study reveals that cybersecurity, AI, and cloud computing are top technology investments. With hybrid work now embedded into the workplace, there is a growing need for MPS suppliers to deliver effective workplace technology for hybrid work environments, ensuring security while not impacting user productivity. Meanwhile, organisations are planning technology refreshes to embrace AI-powered PCs. This is set to drive significant opportunities for MPS providers to offer more advanced services. Quocirca's research shows that 95% of companies plan to refresh their technology to embrace AI-enabled PCs in the next year, and 73% of those planning to refresh their PCs say they will also refresh their printer fleet at the same time.

While leading MPS providers already leverage AI for predictive maintenance and support, they can also use it to offer advanced analytics to improve device optimisation, identify opportunities for digitisation, and help secure devices and documents.

In terms of top drivers for MPS, lowering environmental impact (average score of 4.45 out of 5); improving security (average score of 4.22) and service quality (4.16) are top drivers). However, MPS is underperforming when it comes to rating the effectiveness of MPS for lowering environmental impact, receiving an average score of 3.9. Security also underperforms (3.98) and, notably, reduced cost (3.88).

Nevertheless, overall satisfaction rates with MPS providers are relatively positive. Overall, 48% of organisations are very satisfied and 44% quite satisfied with their MPS provider. Midmarket organisations are most satisfied (57%) and organisations in the US (52%). Just over a quarter (26%) say that they definitely plan to change provider at the end of their contract, with 39% saying that they will potentially change provider.

The commoditisation of MPS services is a growing challenge for providers. With the core services available across many suppliers, customers face an increasing number of options, leading to lower loyalty. As competition in the MPS sector intensifies, customers expect higher levels of service and support. Ultimately, MPS providers that fail to deliver exceptional customer experiences risk losing clients. Proactive support is key, with customers valuing this over reactive support. Also, with cybersecurity front of mind for many organisations, customers prioritise security and compliance. MPS providers with weak security measures or outdated compliance practices risk losing customers.

Quocirca's research also reveals that the top selection criteria for MPS providers are IT expertise (42%), cybersecurity expertise (33%), and workflow automation expertise (31%). To support digital transformation, customers are increasingly adopting new technologies. MPS providers that fail to adapt and offer relevant services may become obsolete. Equally, the rise of AI and automation is changing the MSP landscape. Providers that do not leverage these technologies to improve efficiency and service delivery may fall behind.

To mitigate these risks, MPS providers must build strong customer relationships, differentiate their services, and invest in emerging technologies. Additionally, they should prioritise cybersecurity and compliance to protect their clients' data.

This report highlights the findings from Quocirca's primary research study, conducted in July 2024 across 500 organisations with over 250 employees using MPS in the UK, France, Germany, and the US. The report also includes detailed profiles of the key MPS providers and their service offerings, as well as a vendor landscape of the market leaders and strong players.

Please note that this is an excerpt of the full MPS Vendor Landscape, which is available from www.quocirca.com.

Key findings

- **Cybersecurity, AI, and cloud computing are the top technology investments for the coming year.** Overall, 66% expect investment in cybersecurity to increase, rising to 70% among large organisations and 71% in the UK. This is followed closely by AI, where 64% overall plan to increase investment, rising to 70% in the midmarket, 70% in the professional services sector, and 75% in the UK. Cloud computing is in third place (56%). While less than half (48%) overall report that they will increase investment in their print infrastructure, this rises to 52% in the US and midmarket organisations. Overall, 48% of respondents expect that print and imaging infrastructure investments will increase in the coming 12 months.
- **This rise in hybrid work continues to impact print volumes.** While 76% report that print remains important to their business, on average, respondents estimate that print volumes are 55% of pre-pandemic levels, with variations by organisation size, sector, and region. However, there are some encouraging signs, with office print volumes expected to grow by an average of 4% in the coming year compared to 2023.
- **Hybrid work models create print management challenges around cost and security.** The top three challenges include reducing the environmental impact of printing (38%), cost control (38%), and security (36%). Notably, environmental impact has moved into joint first place with cost control from third place overall last year, reflecting growing concerns about reducing the environmental costs associated with a distributed print infrastructure. Security is by some margin the biggest challenge for midmarket organisations (46%), compared to 31% for SMBs and large enterprises.
- **Security, hardware refreshes, and workflow solutions are top print technology priorities.** Security (26%), hardware refreshes (23%), and workflow solutions (23%) are the top three print management priorities for the coming year. Implementing security solutions is the top priority in the UK (31%), midmarket (28%), and industrial sector (29%). A significant majority (79%) intend to upgrade their PCs to leverage AI capabilities within the next year. This is also set to spark a print technology refresh, with 73% planning to update their printer fleet alongside their PC technology refresh.
- **The majority are looking to standardise on a single MPS provider.** Most respondents (58%) are using a single MPS provider to manage a standardised fleet, with a further 27% having a multi-vendor fleet managed by a single MPS provider. Most (64%) of those with a multi-vendor fleet plan to standardise their fleet. The average number of print devices managed under an MPS is just under two thirds (64%). This rises to 69% for large organisations.
- **Online purchasing of home and office printers is widely prevalent.** Overall, 69% of organisations have purchased an office printer online in the past year, and 62% have bought a home printer, with 20% saying they plan to do so in the coming year. This is most widespread among mid-sized organisations (500–999 employees) that report they have purchased office (75%) and home printers (70%) online. Such printers risk not being included within existing MPS solutions, which can lead to security implications, data breaches, and financial and reputational costs.
- **Just under half of organisations are very satisfied with their MPS provider.** Overall, 48% of respondents state that they are very satisfied with their existing MPS provider, with a further 44% saying they are quite satisfied. Over a quarter (26%) state that they will definitely be changing provider at the end of their contract. This rises to 29% in the US and 30% in mid-sized organisations. Overall, a further 39% say that they will potentially change providers.
- **IT expertise is the top selection criterion for an MPS provider.** IT (42%), cybersecurity (33%), and workflow automation expertise (31%) are the top three selection criteria for MPS providers. IT expertise rises to 44% in Germany, 48% in mid-sized organisations, and 45% in professional services and finance. Cybersecurity expertise is most important to US organisations (36%) and SMBs (36%). Almost half (48%) of respondents state that they already use a single supplier to manage their IT and print environments. A further 43% state that they are open to such an approach.
- **The MPS market continues to shift towards workplace transformation.** Leading MPS vendors that offer data-driven approaches to enable organisations to enhance security and lower their environmental footprint through integrated print and capture platforms are best positioned to support their customers' workplace transformation journey. This report includes an analysis of the leading and major players in the market.

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Quocirca MPS vendor assessment

Quocirca's vendor assessment is based on a range of criteria that determine an overall score for market presence and completeness of offering. Each score is based on a scale of 1 to 5, where 1 is weak and 5 is very strong. This evaluation of the MPS market is intended as a starting point only. Please note that Quocirca's scoring is based on an unweighted model, although prospective buyers may wish to weight the scores to meet their own specific needs.

Strategy criteria

- **Enterprise customers.** The strength of the vendor's global enterprise customer base.
- **Vision and strategy.** The comprehensiveness of the vendor's MPS strategy, the quality of its overall value proposition, and its evolutionary vision for MPS.
- **Maturity of offerings.** How long the vendor has been active in the market and how developed its offerings are.
- **Geographic reach.** A vendor's geographical reach, via either direct engagement or partners or channels.
- **Market credibility.** The effectiveness of the vendor's initiatives to promote its brand, increase awareness of its service offering, and influence market development. This also includes the clarity, 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 and resources and innovation that will add improvements in approach, processes, or service offerings.

Completeness of offering criteria

- **Modularity of services.** The flexibility and scalability of the service portfolio to provide a customised offering.
- **Breadth and depth of service offering.** The range of services available, including complementary ones such as business process and IT services.
- **Help-desk capabilities.** Centralised help-desk capabilities and integration, remote diagnostics, and support.
- **Production printing.** Central reprographics department (CRD) or print-room services to support high-volume printing requirements.
- **Multi-vendor support and maintenance.** The vendor's ability to service and support third-party products.
- **Reporting.** The breadth and depth of capabilities to provide analytics and reporting.
- **Workflow automation.** Capabilities and expertise for business process automation – both software solutions and business process services. This includes solutions to support document capture, routing, and integration with enterprise content management (ECM) systems.
- **Industry solutions.** Ability to offer industry software solutions in key vertical markets and industry alignment of the sales force.

Figure 1 represents Quocirca’s view of the competitive landscape for MPS vendors. Please see the Methodology section for details on vendor inclusion and exclusion criteria.

- **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.
- **Major players.** Vendors that have established, proven offerings and are continuing to develop their solutions service portfolio. These vendors tend to be primarily channel-centric in their go-to-market approach.

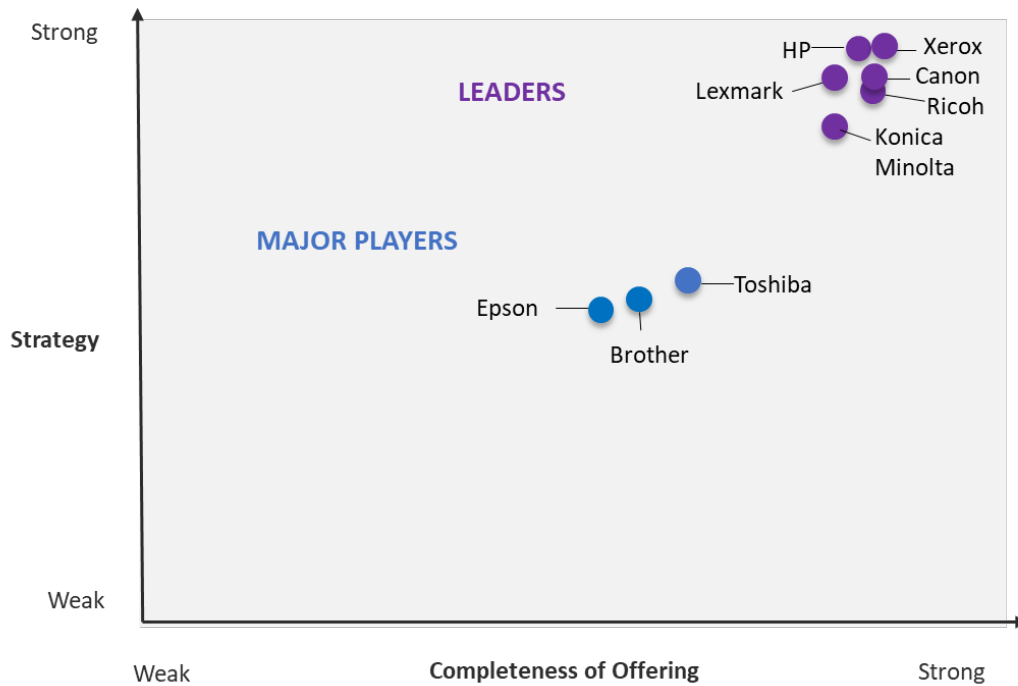


Figure 1. Quocirca MPS Vendor Landscape, 2024

The Quocirca Vendor Landscape is a graphical representation of Quocirca’s opinion of the market and based on Quocirca’s scorecard methodology. This information is provided as a visual representation only and should be combined with other sources to determine the suitability of any vendor. Quocirca does not endorse any vendor, product, or service. Information is based on the best available resources, and opinions reflect judgment at the time. All opinions are subject to change.

Vendor profile: HP

Quocirca opinion

HP retains a leadership position in Quocirca's assessment of the managed print services (MPS) market in 2024. HP's MPS offering is part of HP's Managed Solutions portfolio, which also includes managed device services (PC) and managed collaboration services (MCS). HP's global reach and extensive channel ecosystem is supported by one of the broadest portfolios on the market. In March 2024, HP announced its strategy to drive AI innovation across its PC, print, and Workforce Solutions portfolio. In particular, HP's newly formed Workforce Solutions business is making strong inroads by providing integrated solutions across print, personal systems, and workspace collaboration. The company is addressing customer requirements by evolving beyond the provision of stand-alone PCs and printers. HP now delivers comprehensive solutions that incorporate monitoring and insights, providing customers with a holistic approach to their technology needs. Of note is HP's Workforce Experience Platform, which monitors fleet health, performance, and security across the hybrid workplace.

HP excels in its approach to driving sustainability as a foundation for its products and services. The company has embedded sustainability across its MPS portfolio and channel engagement through HP Amplify Impact, which remains the broadest sustainability-led channel programme in the market. In addition to the standard document assessment offerings, HP offers a lifecycle assessment of the print fleet, including offsetting and reporting services to enable customers to achieve a carbon-neutral print environment. In March 2024, HP launched HP Renew Solutions, which offers HP Certified refurbished hardware (including PCs and printers). These devices are reported to deliver optimal performance and functionality at a lower cost than new devices.

Security, solutions, and service innovation remain at the forefront of HP's strategy. Leveraging HP Security Labs' leading security threat research and development, HP Wolf Security is a strong differentiator for HP, particularly at a device level, where ML technologies are embedded to enhance end-point security. HP offers a rigorous approach to security assessments and executive-level professional security advisory services, supported by the Print Security Centre of Excellence. Professional services security and technology experts conduct detailed security assessments and AI analytics-led strategic reviews using real-time data and innovation roadmaps across its managed services offerings. The company has also expanded its security advisory services to include recommended security settings for remote and home workers, covering print and personal systems and security training and guides.

As the managed print services (MPS) market continues to evolve, supporting advanced digital workplace transformation, HP is well positioned to assist its customers with a broader range of workplace services. It continues to strengthen its broad portfolio of AI-enabled intelligent capture and workflow automation solutions as well as leverage a broad third-party solutions ecosystem. This is core to its MPS strategy as it ensures interoperability, strengthening HP's ability to support both HP-only and mixed vendor fleets.

Service offerings

HP has introduced a six-phase framework for delivering professional and managed services across its MPS, MDS, and MCS portfolios to streamline its offerings. This structured approach, encompassing Definition, Design, Deployment, Monitoring, Management, and Support, ensures consistent customer engagement. By initially identifying specific customer challenges and objectives, HP tailors solutions combining hardware, supplies, software (on-premise or cloud-based), and proactive services to address these needs.

HP's new Global Operations Centers are at the core of this framework, providing advanced proactive monitoring and remediation for MPS. HP Service Experts analyse data globally to proactively address issues, ensuring employees have optimal device, printer, and room experiences. Additionally, HP is enhancing customer engagement with improved outcome-based reporting. Monthly reports offer insights and recommendations on asset inventory, performance, health, security, and compatibility, highlighting actions to boost environment performance.

MPS

HP offers a wide range of MPS programmes that suit various customer segments and profiles, ensuring there is something available for every customer. Depending on the customer segment, these may be delivered directly to customers or indirectly through HP's vast channel network of MPS Specialist partners, certified under the HP Amplify programme.

- **Managed Print Cloud Services (MPCS).** HP has created Managed Print Cloud Services (MPCS) for Enterprise Direct customers to deliver a global, fully managed cloud infrastructure service with layered HP Wolf Security. It enables clients to shift on-premise print assets to the cloud and outsource their end-to-end print management to HP as part of an ongoing service agreement. HP MPCS releases IT resources, provides a secure and private consistent architecture, and leverages the continuous innovation of HP and the cloud. This enables clients to reinvest saved resources in more strategic initiatives, such as investing in AI and other digital solutions that support their future of work. HP MPCS provisions, manages, and supports the print cloud service via a secure hosted cloud infrastructure based on a standardised cloud architecture. HP may adopt variants of the cloud architecture in collaboration with the client, and when mutually agreed upon, it will deploy and operate this in a secure hosted cloud infrastructure. MPCS consists of an in-scope cloud computing environment via a cloud service provider and includes, as required, the infrastructure, print tools, software, and associated services.
- **Remote Management Services.** HP offers a comprehensive range of Remote Management Services (RMS) designed to provide customers with remote assistance and execution of key tasks related to MPS devices and software solutions' management, updating, and security. The RMS portfolio allows customers to select services tailored to their needs, including firmware management, device configuration, and proactive diagnostic support. These services can be easily upgraded with flexible packages that match evolving requirements. Offerings include additional remote print services and support for various solution packages such as Workflow Solutions Administration, License Management, HP Workpath App Management, and Security and Governance Services. These solutions deliver advanced monitoring systems, improved fleet configurability, pull print capabilities, and strengthened security and compliance measures. RMS added value is focused on streamlining user operations, ensuring optimal performance of customers' printing infrastructure, and freeing up IT personnel from print management activities.
- **Customer Outcome Management.** HP will provide customers with access to its Value Management Office (VMO). The VMO is a dedicated programme office to help quantify, track, and optimise the business impact of the print services programme. It is a strategic service with consultancy resources and productivity tools available to ensure they are continually partnering with HP to anticipate, track, optimise, and communicate the business impact of HP Managed Print Services. The anchor of the VMO is a collaborative, cloud-based software platform that enables the customer to benchmark all aspects of the print programme against peers of common size and industry. It also helps quantify potential and actual programme impact across various value pillars, such as improved productivity, reduced costs, improved user experience, environmental sustainability, and security/risk mitigation.
- **Multi-vendor services.** HP currently supports multi-vendor devices with capabilities that include device monitoring, automated supplies fulfilment through a cloud-based toolset, and break/fix services. Its vision is to evolve the multi-vendor programme to align more closely with the comprehensive managed services it offers for HP devices. The company plans to expand this programme to enhance support for third-party brands within its MDS and MCS portfolios. This enhancement will strengthen HP's position as a leading services provider.
- **Proactive services.** HP enhances the customer service experience through its cloud-based Smart Device Services (SDS). SDS telemetry software monitors and maintains the performance and health of managed print fleets. It ensures devices are configured correctly, detects server errors, and verifies print functionality. When issues arise, HP initiates proactive corrective actions to restore functionality, minimising downtime and reducing on-site visits.

- **HP Workforce Experience Platform.** The core of the Workforce Experience Platform printer fleet monitoring & management capabilities is the policy engine that allows an administrator to create a configuration policy and apply that to various groups and sub-groups of their fleet of devices, knowing that the policy engine will not only configure those devices as the policy is deployed but also remediate any configuration settings as it detects deviations from the policy. The Workforce Experience Platform, currently in its development phase for MPS, integrates service-based device telemetry to enhance service and support capabilities. This information helps improve the efficiency of help-desk agents and technicians and reduces time to service, increasing device availability, reducing parts waste, and increasing first-time fix rate. In the coming year, the Workforce Experience Platform will provide the ability to engage with end users to gauge their sentiment through interactive surveys that the administrator or service provider can tailor. This information can be used in concert with the device telemetry to close the loop on how users are truly experiencing each device. This insight will be available in the platform in addition to the traditional fleet management analytics that administrators rely on to manage their fleets.

Additional MPS programmes

- **HP Flexworker.** This leverages a fully cloud-enabled set of tools to provide a platform to integrate work-from-home devices into an MPS contract for a flat monthly fee per device. Designed as a subscription-based add-on for existing MPS customers, the programme provides a list of approved devices, automated supplies fulfilment, and ongoing technical support. It can also deploy additional security controls with remote monitoring and customised policies.
- **HP Managed Print Services Subscription (MPSS).** MPSS is a comprehensive cloud-managed print service that combines automated supplies delivery, next-business-day support, and online fleet analytics. The customer will be charged a monthly flat subscription rate with pages included, plus an overage for the extra pages. The smart plans ensure that the more the customer prints, the lower the cost. MPSS offers a simple printer set-up based on HP cloud, which helps optimise usage and expenditure through the device insights that are available online through HP's device management portal (DCC). Customers can create extra hours in their day with a reliable print service that takes care of itself with smart plans to ensure they get the best cost option each month for what they print and get supplies ahead of time, when and where they need them.

Security

HP has a mature, robust approach to security and is delivering on its market-leading, future-ready security strategy and vision. It continues to invest heavily in print security innovations, solutions, and services across consumer, office, large-format, and 3D print. In 2023, it launched its first Print Security Center of Excellence. It also initiated the design and development of new cybersecurity ecosystem partnerships and a zero-trust end-point playbook for channel and direct customers to speed the planning and implementation of a zero-trust print architecture (ZTPA). HP also invested in a new operational infrastructure with technological advancements in cryptography, embedded device detection, protection, and recovery features, as well as the development and launch of passwordless, anti-phishing modern authentication with HP Authentication Suite and HP Authentication Manager.

Sustainability

- **HP Carbon Neutral Service.** Through HP's MPS customers can reduce the carbon footprint of their print infrastructure by improving resource efficiency and driving responsible user behaviour through settings that reduce energy, supplies, and paper use. Customers can offset any remaining emissions through third-party-verified projects around the globe in partnership with Climate Impact Partners, facilitated by HP.
- **HP Renew Solutions.** HP commercial customers can reduce hardware expenses and accelerate sustainability goals with its flexible suite of certified refurbished devices for PCs and printing.

Professional services

Alongside its standard MPS offering and enabling the Define, Design, and Deploy pieces of its new framework, HP provides a full suite of professional services. These professional assessment services aim to guide customers to the optimal experience and ensure they receive the right Managed Print Solution for their specific business objectives. These services enable customers to minimise risk, accelerate time to value, enhance adoption, and maximise ROI. They support customers at every stage of their journey, setting the foundation for engagement by aligning strategic goals with a technology roadmap. HP's professional assessment services define the path toward achieving these goals effectively. These assessment services offer cloud readiness and transition, as well as full Managed Print Cloud Services, to deliver, set up, and maintain the cloud infrastructure. Also available are workflow assessments and development, security advisory and implementation services, and ongoing security compliance and governance services. Transition and Implementation services are available to assist during the Deploy phase of the MPS.

AI-driven analytics

By integrating advanced AI technologies, HP aims to improve how print environments are managed, providing smarter, more efficient solutions that anticipate and address needs before they arise. AI will enable predictive maintenance, optimise print workflows, and offer deeper insights into device usage and user behaviour. Integration of such technologies will enhance the overall effectiveness of HP's MPS offerings, driving greater operational efficiency and delivering a superior experience for customers. HP will continue to review and define areas where AI will make a difference to its operations and customers and implement relevant technologies where they make sense.

AI-enabled integrations include:

- **HP's Workforce Experience Platform.** This will leverage AI technologies in several different areas to deliver service-based efficiencies. For instance, HP Smart Device Services uses AI to deliver the insights needed to optimise service delivery. This can come in the form of recommended actions to replace a part based on failure prediction models or through advanced diagnostics that can help identify part wear or failure. In addition to the SDS capabilities, the Workforce Experience Platform will provide the ability to deliver more efficient support through artificial intelligence. This capability will leverage data from the platform and other support resources to provide an intuitive and efficient support experience for administrators and IT managers to quickly and easily get the information they need.
- **HP Scan AI Enhanced.** A cloud-based AI service for classification, separation, and data extraction from images collected from MFPs via HP Workpath and Scan to File functions.
- **HP Intelligent Capture.** A cloud-based solution that intelligently identifies and extracts business information from paper and digital documents. This platform uses AI to classify, index, and store information in a database, or submit the information to launch a business workflow.
- **HP Intelligent Transformation (UK & US Availability only).** An AI-powered SaaS platform to accelerate digital transformation of paper-based processes. It uses persona and user journey data from paper-based process participants to develop solutions and opportunities for improvement. Designing solutions to automate paper processes enables digital transformations to improve agility, efficiency, accuracy, experiences, and other desirable business outcomes.

Strengths and opportunities

Strengths

- **Comprehensive managed solutions portfolio across print, PC, and collaboration.** HP has a broad offering across print, PC, and workspace collaboration, placing it in a strong position to support hybrid work environments with a consistent user experience. HP is increasingly offering a single approach to analysing and managing print and PC environments through in-depth assessments and integrated solutions via its Workforce Solutions strategy.

- **Extensive range of flexible MPS offerings.** HP continues to strengthen its cloud-based MPS offerings with flexible subscription packages suited for businesses of all sizes.
- **Strong security credentials.** HP has a mature, robust security approach and continues investing heavily in print security innovations, solutions, and services. Its suite of advanced security assessment services and its new framework around a zero-trust architecture (ZTPA) are strong differentiators in the market.
- **Sustainability-first approach.** HP has built an extensive range of sustainability services, including carbon-neutral MPS offerings, comprehensive sustainability assessments, and a refurbishment offering through HP Renew. It also continues to expand its HP Amplify Impact channel programme, enabling channel partners to build their own sustainability-led engagements.
- **Strong focus on AI.** HP is actively leveraging AI technology across both its MPS platform, analytics, and reporting, as well as and within its print drivers. AI is also a key element of the Workforce Enterprise Platform.

Opportunities

- **Elevate positioning around content and workflow automation.** HP possesses a robust workflow automation platform with a rich feature set and a strong consultancy offering. This includes HP WorkPath Apps, HP Intelligent Capture, HP Intelligent Workflows, and HP Intelligent Transformation. These capabilities are a key element of a transformative approach to MPS, and it is essential for HP to build a clear and compelling proposition around these advanced services.
- **Develop more clarity around integration of MPS and other services.** Although HP has a comprehensive offering across PC, collaboration, and print, more must be clarified about how an integrated managed services platform can support all in-scope devices.
- **Expand opportunities around smart building and workplace services.** Given its extensive portfolio, HP has an opportunity to develop broader smart workplace services, leveraging AI, analytics, and automation.
- **Emphasise data-driven models.** HP has built a strong data-centric approach across its MPS platform and should leverage this to deliver enhanced business outcomes for customers looking to advance and transform their document processes and workflow automation.

Recommendations

Buyer recommendations

Quocirca recommends that buyers carefully evaluate MPS providers for their ability to deliver innovative services that support the full digital transformation journey across the print and digital workflow.

- **Evaluate modularity and flexible subscription service offerings.** MPS offerings vary considerably, especially for smaller organisations that will benefit from flexible subscriptions in which MPS providers can offer tailored solutions that align with customer needs. Look for flexible subscriptions that can adapt as requirements evolve, for instance, a basic MPS may be suitable for SMBs but should also be able to incorporate cloud-based workflow solutions, digitisation, application integrations, and other services that may be required as the company grows.
- **Ensure that the MPS contract supports devices for both home and office environments.** Using MPS is an important way for businesses to better manage and control their print activities across all of their employees in all of their working locations. Look for providers that can advise on and deliver home-office device provision, monitor usage and security patterns, and offer solutions that deliver closer collaboration between the home and office environment, including secure print management alongside consumables replenishment services. Reduce online purchasing of devices (whether shadow or authorised) by incorporating devices into MPS contracts to mitigate security risks caused by unmanaged devices that are purchased transactionally.
- **Select providers that prioritise cybersecurity.** Aside from the standard evaluation of MPS providers to ensure they conform with security certifications and accreditations, check that they can clearly articulate their approach to protecting devices from compromise to guarantee document, network, and user security. Evaluate cloud security models, gain clarity on identity access management integration with secure printing and capture solutions, and ask providers about their approach to security posture assessments and security incident management should a print-related data compromise occur.
- **Evaluate how cloud print services and solutions can lower both financial and environmental costs.** Select MPS providers that can demonstrate how a cloud platform provides ongoing, long-term support across both print and capture requirements. Consider serverless printing to reduce reliance on on-premise-servers, but ensure that functionality, data sovereignty, and data privacy requirements are addressed.
- **Create a roadmap for workflow automation to support broader digital strategies.** Select MPS providers that can demonstrate a coherent roadmap for digitisation that incorporates information management and workflow automation. MPS providers are well positioned to bridge the print and digital gap and provide effective support in this area. Consider standardising on MFP hardware to gain the benefits of proprietary and integrated hardware alongside specialised software in the information management space.
- **Leverage analytics data to deliver continuous improvement.** Ensure that the MPS provider not only delivers deep insight into device usage across a printer fleet but also uncovers valuable information to identify opportunities for improved automation and minimising of manual paper-based processes. Consider how AI is leveraged to support analytics beyond its current use for predictive maintenance and support.
- **Look for measurable sustainability benefits.** MPS providers are constantly enhancing their sustainability propositions around hardware circularity – including energy efficiency, longevity, and lower service interventions. Conduct in-depth environmental assessments across the existing fleet to identify outdated and inefficient hardware and work with the MPS provider to implement print management solutions to minimise wasteful printing and improve the environmental performance of the print environment as well as data to support environmental audits.

About Quocirca

Quocirca is a global market insight and research firm specialising in the convergence of print and digital technologies in the future workplace.

Since 2006, Quocirca has played an influential role in advising clients on major shifts in the market. Our consulting and research are at the forefront of the rapidly evolving print services and solutions market, trusted by clients seeking new strategies to address disruptive technologies.

Quocirca has pioneered research in many emerging market areas. More than 10 years ago we were the first to analyse the competitive global market landscape for managed print services (MPS), followed by the first global competitive review of the print security market. More recently Quocirca reinforced its leading and unique approach in the market, publishing the first study looking at the smart, connected future of print in the digital workplace. The [Global Print 2025 study](#) provides unparalleled insight into the impact of digital disruption, from both an industry executive and end-user perspective.

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