

## COMPETITIVE ANALYSIS

### IDC MarketScape: Worldwide Managed Print Services 2011 Hardcopy Vendor Analysis

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#### IDC OPINION

This IDC study assesses 11 hardcopy vendors that are participating in the worldwide managed print services (MPS) market. Vendor selection included vendors with existing and developing MPS programs. This assessment discusses both quantitative and qualitative characteristics that explain success in this important market. Growth of print services will continue to escalate as companies of all sizes recognize the savings and efficiencies that can be realized under such programs, and vendors compete aggressively to expand market reach and gain share. Though the MPS market is still growing, it is becoming increasingly competitive as additional players enter the market. It is also maturing, with some components rapidly entering the realm of commodity. Key strategy success factors identified from this study include:

- ☒ **Consistent delivery, regionally, multinationally, and/or globally.** "Consistency" refers to uniformity of products, services, and pricing; standardized training of sales and support personnel; seamless infrastructure for ongoing customer management; and globally integrated sales force and billing at regional and global levels.
- ☒ **Professional services capabilities around both horizontal and industry-specific document processes.** This means having the business process and vertical expertise to understand a customer's pain points and then craft the best combination of technology and services to meet real customer requirements.
- ☒ **Support for an indirect channel.** Support includes training, business development, and marketing support in addition to the products and services portfolio.
- ☒ **Offerings beyond fleet management and the office.** Offerings include management of production print facilities and in the commercial purchase of print.
- ☒ **Technology to address a range of customers' security requirements.** Solutions should extend to mobile and remote workers.
- ☒ **IT capabilities and/or partnerships.** Access to IT management capabilities through partnerships can provide access to a broader customer base.

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## IN THIS STUDY

This study is IDC's second annual vendor assessment of the worldwide managed print services market using the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in this important and growing market.

This study is composed of two sections. The first section describes characteristics that IDC believes lead to success in the managed print services market. These characteristics are based on vendor surveys conducted for this study, IDC's end-user surveys, and analyst observations of best practices.

The second part of this study is a visual presentation of the resulting vendor analysis in a single bubble chart. This display concisely exhibits the quantified scores of the reviewed vendors along two axes — strategies and current capabilities — which determine if the vendor is a Leader, a Major Player, a Contender, or a Participant. In addition, vendor market size (as determined by direct MPS and BPS revenue) is indicated by the size of the bubble, and growth relative to the whole market is shown as a "+" or "-" symbol. This section also provides vendor summaries that discuss IDC's positioning of each vendor in the market along with commentary on strengths reflected in their scoring and opportunities for improvement.

The document concludes with IDC's essential guidance to vendors in support of growth and improved offerings.

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## Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent the extensive research foundation used to study the market and specific vendors. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape graphic, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability. Market weightings are based on vendor surveys and interviews, end-user surveys and interviews, and the input of a review board composed of IDC experts in the market.

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## Definitions

The definitions that follow distinguish between managed print services (MPS) and basic print services (BPS). MPS is the subject of the sections of this MarketScape analysis covering vendor strategies and capabilities. However, vendor revenue estimates used to determine the bubble size in the MarketScape graphic reflect *both* managed print services and basic print services revenue. This revenue was generated from products and services delivered *directly* from the manufacturers to their end customers as well as MPS- and BPS-related revenue derived from products and service delivered via an indirect channel.

Both basic print services and managed print services must include the following:

- ☒ **Contract scope** refers to third-party management of a group or fleet of printers and/or MFPs (may also include other device types such as scanners).
- ☒ **Contract length** is multiyear.
- ☒ **Environments** cover distributed office environment and may include in-plant, CRD, or datacenter in addition to office environment; however, contracts that include *only* centralized facilities are excluded.
- ☒ **Coverage** includes one of the following product and service combinations:
  - ☐ Ink/toner and maintenance/repairs
  - ☐ Ink/toner and maintenance/repairs plus printer/MFP hardware (purchases and leases)
- ☒ **Consolidated fleet billing** refers to a single bill for at least consumables (ink/toner), maintenance, and repairs (break/fix) for all the printers/MFP fleet of devices under management. Billing may have a hardware component.
- ☒ **Fleet usage monitoring** tracks print/copy volumes. The service includes a remote monitoring solution while acknowledging the fact that non-network connected machines would require manual monitoring.

In addition, managed print services must include the following:

- ☒ **Detailed up-front assessment:** Provider analyzing a sample of the organization's actual print/copy usage and recommends an output strategy for optimization with defined goals
- ☒ **Fleet usage analysis/reporting:** Ongoing analysis, reporting, and recommendations against predefined goals
- ☒ **Ongoing optimization:** Ongoing optimization with proactive management using the provider's resources to continuously manage the environment toward contract goals
- ☒ **Change management:** A formal program with education and incentives to get employees and their managers to achieve and sustain contract goals for printing and document workflows

## SITUATION OVERVIEW

### Introduction

The managed print services market continues to grow, mature, and evolve. However, as more and more service providers jump on the MPS bandwagon, there are almost as many definitions of MPS as there are providers. In response, in the 2010 IDC

MarketScape MPS vendor analysis (see *IDC MarketScape: Worldwide Managed Print Services 2010 Hardcopy Vendor Analysis*, IDC #222872, April 2010), we introduced a definition of MPS that emphasizes proactive management of the end customer's imaging and printing environment and continuous improvement of that environment. In 2011, we introduced one additional component to the definition: change management, which we define as "a formal program with education and incentives to get employees and their managers to achieve and sustain contract goals for printing and document workflows." (See the Definitions section.) We expanded the definition because both MPS vendors and their customers have consistently told us that consideration of the human facet of an engagement is critical to achieving and sustaining contract goals.

We further differentiate MPS from basic print services, or BPS, which is a bundled offering without the proactive continuous improvement of a customer's printing and imaging environment. The rationale behind the definitions is to provide vendors, channels, and end users with the ability to effectively evaluate, track, and manage their business and contracts.

Growth of print services will continue to escalate as companies of all sizes recognize the savings and efficiencies that can be realized under such programs and vendors compete aggressively to expand market reach and gain share. IDC expects both the MPS and BPS markets to continue to see healthy expansion.

#### ***IDC MarketScape Vendor Inclusion Criteria***

Participation in the study was extended to hardcopy vendors that offer managed print services and basic print services. Excluded from the study were IT outsourcing companies that either offer print services as part of their IT services or subcontract those services to hardcopy vendors. Companies deciding not to participate in the study were scored using publicly available information and the analyst's knowledge.

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## **Key Industry Trends**

In conducting our research for this IDC MarketScape analysis, several key trends became apparent, as discussed in the sections that follow. Many of these trends reflect vendor initiatives to expand their MPS portfolios as "traditional" fleet management and optimization becomes commoditized and more players enter the market.

### ***Focus on Consistent Global Delivery***

Virtually all of the leading vendors emphasized the ability to deliver consistent print services globally as an important differentiator. Consistency refers to global uniformity of products (both hardware and software), services, and pricing; standardized training of sales and support personnel; and billing at regional and global levels. The importance of this trend was validated in customer interviews. It is important to note that despite uniformity in promotional messaging, the hardcopy vendors demonstrate varying levels of planning and execution.

### ***Verticalization***

Several vendors have structured solutions, go-to-market strategies, and support around specific vertical industries and specific workflow processes within those industries. Examples are patient admissions for healthcare providers, new account processing for financial services, and testing and grading solutions for education. The result is greater differentiation for the vendor and value for the customer that reaches beyond cost savings through fleet optimization.

### ***MPS Through Indirect Distribution Channels***

Indirect distribution of managed print services refers to a variety of distribution models ranging from the channel partner functioning as an agent for an engagement that is wholly owned and delivered by the hardcopy vendor to an engagement in which the channel partner owns the contract and delivers hardware, software, and services from a number of hardcopy vendors. Some vendors distribute MPS products and services primarily through their office equipment dealer and IT reseller channels. Others are just ramping up this model. A thorough discussion of the various models is beyond the scope of this analysis. However, it is an important trend to watch because it enables vendors that have predominantly served the enterprise market to expand into the growing SMB space, putting them in competition with vendors that have traditionally served small to midsize businesses.

### ***Cross-Environment Approach***

Another way vendors are expanding their market reach is by offering management of centralized print environments (copy center/CRD, datacenter, and mailroom) or procurement of external print as a component of an MPS engagement. Some vendors supplement onsite production print facilities with their own, or a partner's, external production capabilities. The value for the vendor is greater share of the customer's wallet. For the customer, benefits include rightsizing of the entire enterprise for greater cost savings by ensuring that jobs are produced on the most appropriate device.

Some vendors are pursuing this business aggressively, while others take a more opportunistic approach in response to customer needs. Vendors that were key players in the print facilities management market are well positioned to leverage those capabilities in combination with management of office distributed fleets. Partnerships are also leveling the playing field.

### ***Commoditization of Software Solutions***

Whereas in the past a vendor's software portfolio could serve as a key differentiator, in today's MPS market, many print management solutions are a given utility component of any contract and, in many cases, are sourced from the same third-party software provider. While we are seeing innovation in the delivery of these solutions (e.g., cloud enabled), most offer little competitive differentiation. Exceptions are software implementations that manage specific business processes and/or specific vertical industry applications.



### ***Increased Security Concerns***

Driven by the ubiquitous presence of network-connected devices, cloud-enabled solutions, and an increasingly mobile workforce, MPS customers are turning greater scrutiny on the security of their document production, transmission, and storage. Vendors are responding with a variety of solutions from "follow me" printing to virtual shredding.

### ***MPS and IT***

Several vendors are leveraging existing IT resources or building IT capabilities that parallel managed print services offerings. We expect to see greater convergence of IT outsourcing and managed print services as customers seek a single source to manage all desktop, printing, and imaging resources and vendors develop the capacity to do so. Past IDC research has shown that the ability to integrate MPS with other IT projects and the breadth of IT outsourcing capabilities rank high with all sized firms.

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## **Market Strategies**

This section includes definitions of market-specific factors and their weightings that were used to evaluate the vendors in this IDC MarketScape. The managed print services market exhibits characteristics that suppliers must take into consideration when crafting a future strategy and in leveraging existing capabilities to best advantage. The factors were weighted because IDC believes that some are more important than others in maximizing market opportunity and realizing market success.

Though this IDC MarketScape is a refresh of an analysis completed in 2010, the definitions and weighting have been adjusted for almost every criterion in response to dynamic market conditions. While 2010's definitions and weightings were more focused on a "checklist" of fleet management capabilities, this year's focus is on solutions that extend beyond the fleet and offer additional value for customers.

### ***Strategies***

The strategies category (see Table 1) focuses on high-level strategic decisions and underlying assumptions about offerings, customer segments, business, and go-to-market plans for the next three to five years. This category considers whether or not a vendor's strategies in various areas are aligned with customer requirements (and spending) over that time period.

**TABLE 1****Key Strategy Measures for Success: Managed Print Services**

Strategy Criteria	Criteria for Success	Subcriteria Weighting
<b>Offering strategy</b>		
Functionality or offering road map	Managed print services' current functionality and architecture are extensible to meet future customer needs. Future needs include, but are not limited to, such capabilities as document security, auditability of document processes, green initiatives, capture and document processing, mobile printing, support of line of business and vertical complex business processes, and cross-enterprise support, including remote employees, centralized print, mailroom, and external print procurement. The architecture supports both paper and electronic document workflows; manufacturing and/or procurement of production print, direct, and indirect channel delivery/support; and both local and global delivery. Additionally, both the technical infrastructure of the delivery architecture and the ability of the architecture to sustain additional services are considered.	3.00
Delivery model	Components of and support for MPS engagements can be delivered in a variety of ways including software as a service (SaaS), cloud access/computing, and onsite/offsite management. "Delivery" includes using these architectures to manage the devices and other elements of the engagement as well as a vehicle for providing document solutions and value-added services. The appropriate model needs to reflect the size of the customer as well as the channel delivering the service.	1.50
Cost management strategy	The vendor has a well-defined strategy to reduce the cost of professional and support services; to replicate and scale software solutions across customer sizes, verticals, and geographies; and to maximize margin and competitive pricing of its offering. The strategy must be specific to MPS components, including software, consumables, maintenance, and support for multiple brands and support for both direct distribution and indirect distribution.	2.50
Portfolio strategy	The MPS offering is well supported and enhanced by a portfolio of complementary offerings provided by the company or its ecosystem of best-in-class partners. The vendor has a well-defined acquisition strategy and funding ability for both software and services. The vendor has demonstrated the ability to leverage other divisions in its organization.  All of these components reflect a future vision for the MPS market such as role of print versus electronic document workflows, support for vertical and/or line-of-business processes, direct versus indirect distribution, country/regional versus global customers, support for office/home workers, and support for manufacturing and/or procurement of production print.	2.00
Other offering strategies	The vendor has plans to offer or enable financing for both direct and indirect MPS customers. The vendor's strategy includes contract terms flexibility such as contract length, variable break/fix response time to meet customers' varied needs, guaranteed cost savings, and support for mixed brands.	1.00
<b>Offering strategy total</b>		<b>10.00</b>

**TABLE 1****Key Strategy Measures for Success: Managed Print Services**

Strategy Criteria	Criteria for Success	Subcriteria Weighting
<b>Go-to-market strategy</b>		
Pricing model	The vendor realizes that customers want pricing models that match their needs, from variable to flat or a blend. MPS contract pricing models include, but are not limited to, cost per copy, monthly device pricing with or without a cost-per-page usage charge, a flat monthly fee, a guaranteed savings sharing arrangement, or a hybrid of these. The vendor's strategy includes programs that guarantee results, inspire confidence, and reduce customer resistance to outsourcing.	2.50
Sales/distribution strategy	The vendor understands that an MPS offering can be sold by either direct or indirect channels to serve a broader range of customer sizes and requirements. In understanding this, the vendor has committed the appropriate field resources to support multiple channels with an array of rightsized offerings. The vendor has a demonstrated strategy to grow depth and breadth of indirect distribution channel.	3.50
Marketing strategy	The vendor understands that MPS will be a significant revenue stream for this market both currently and in the future. Comprehending this, the vendor has taken the appropriate steps to educate the market on the value and extent of its MPS service and provides differentiable features that help separate it from competitive offerings. Planned marketing investment clearly represents the importance of the MPS business.	2.00
Customer service strategy	The vendor understands that the "ability to deliver" is one of the most critical facets of a successful managed print service offering. The vendor recognizes and can demonstrate that beyond the technology infrastructure required to meet the service deliverable, the administration and "people" delivery of the service are vital to producing year-over-year value to the customer. Finally, the vendor can demonstrate what measurements, such as renewal rates, customer satisfaction, and others, are used as proof points.	2.00
Go-to-market strategy total		10.00
<b>Business strategy</b>		
Growth strategy	Management has articulated, both internally and externally, a strong commitment to delivering a robust MPS offering and a plan for achieving growth in this market that aligns well with the market trends anticipated over the next three to five years. Strategy may include the following elements: direct and indirect distribution; SMB and enterprise solutions; regional, multinational, and global reach; home worker, office, CRD/in-plant, and print procurement; business process document workflow; and portfolio extensions for differentiation.	3.00

**TABLE 1****Key Strategy Measures for Success: Managed Print Services**

Strategy Criteria	Criteria for Success	Subcriteria Weighting
Innovation/R&D pace and productivity	The vendor understands that to increase the capabilities of its MPS offering, it will need to tap not only its internal development resources but also partner with other companies to bring differentiable and innovative capabilities to the market. The vendor has a clear strategy for both R&D investments and partnering worldwide and in the United States in the next three to five years.	3.00
Financial/funding model	The vendor has proportionally allocated the financial resources to deliver a robust MPS offering in the marketplace to current and emerging market opportunities. Commitment of funding and percentage of total revenue are used to score these criteria, including investment in R&D, marketing, and channel programs.	2.00
Employee strategy	The vendor has in place an employee strategy that provides both compensation and advancement opportunities for personnel associated with the sale, delivery, and administration of managed print services. Employee strategy addresses direct sales and indirect channels as well as employees in marketing, business development, support and delivery, R&D, and so forth.	2.00
<b>Business strategy total</b>		<b>10.00</b>

Source: IDC, 2011

**Capabilities**

The capabilities category (see Table 2) focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts look at how developed and good a vendor's capabilities are that enable the vendor to execute its chosen strategy in the worldwide market.

**TABLE 2****Key Capability Measures for Success: Managed Print Services**

Capabilities Criteria	Criteria for Success	Subcriteria Weighting
<b>Offering capabilities</b>		
Functionality/offering delivered	The vendor's current MPS offering provides the appropriate balance of resources to deliver the MPS (technology); support the service (personnel); and administer the service (billing integration, change management, service dispatch, etc.). In addition, the scores reflect full-featured deployment of capabilities identified in the Definitions section. In addition to the minimum MPS requirements described in this definition, the vendor offers some or all of the following capabilities: document security, auditability of document processes, green initiatives, capture and document processing, mobile printing, support of line of business and vertical complex business processes, and cross-enterprise support, including remote employees, centralized print, mailroom, and external print procurement. The vendor supports multiple brands, distributed and centralized environments, both paper and electronic document workflows, manufacturing and/or procurement of production print, direct and indirect channel delivery/support, and both local and global delivery.	4.00
Delivery model appropriateness and execution	Components of and support for MPS engagements can be delivered in a variety of ways including software as a service (SaaS), cloud access/computing, and onsite/offsite management. "Delivery" includes using these architectures to manage the devices and other elements of the engagement as well as a vehicle for providing document solutions and value-added services. Delivery is evaluated based upon technical functionality, administration, and scalability and security.	1.50
Cost competitiveness	The vendor has in place a well-defined business model and understands the costs associated with delivering profitable MPS engagements worldwide. This model is also predictable and ensures the profitability of the offering over the life of the contract while meeting customer requirements. The model includes processes to reduce the cost of professional and support services; to replicate and scale software solutions across customer sizes, verticals, and geographies; and to maximize margin and competitive pricing of its offering. The model includes cost competitiveness for software; consumables (ink/toner, parts, media); maintenance; and support for multiple brands and support for both direct distribution and indirect distribution.	2.50
Portfolio benefits delivered	The vendor has put in place the appropriate resources to deliver the managed print services effectively to the customer and provides the ability to complement the offering with other offerings. The vendor can clearly articulate at a granular level hard and soft cost savings expected during the life of the contract.	2.00
<b>Offering capabilities total</b>		<b>10.00</b>

**TABLE 2****Key Capability Measures for Success: Managed Print Services**

Capabilities Criteria	Criteria for Success	Subcriteria Weighting
<b>Go-to-market capabilities</b>		
Pricing model options and alignment	The vendor's current MPS offering can be obtained using cost per copy, monthly device pricing with or without a cost-per-page usage charge, a flat monthly fee, a guaranteed savings sharing arrangement, or a hybrid of these to meet customer requirements. The vendor offers programs that guarantee results, inspire confidence, and reduce customer resistance to outsourcing.	1.00
Sales/distribution structure, capabilities	The vendor can demonstrate ongoing channel training, supporting infrastructure, solutions portfolio, and other programs required to position and acquire services contracts. The vendor can demonstrate ongoing growth in the depth and breadth of its direct and indirect distribution channels.	3.00
Marketing	Depending upon the vendor's stated target markets (SMB, enterprise, and/or both), the vendor has clearly articulated the value proposition of its MPS offering and comprehends the needs of its target market. The vendor has invested in marketing programs that are consistent with the importance of MPS to the business.	3.00
Customer service	The vendor has implemented processes that ensure consistent and high-quality customer service worldwide, in each region, and through the channel. The vendor has demonstrated a level of customer satisfaction in the form of high renewal rates and customer satisfaction ratings.	3.00
Go-to-market capabilities total		10.00
<b>Business capabilities</b>		
Growth strategy execution	The vendor can demonstrate the success of its current MPS offering. Success can be defined as direct, indirect, and overall revenue growth; projected revenue growth; devices under management; percentage of channel delivering MPS; and joint go-to-market partnerships with other firms. Additionally, the vendor can point to specific programs currently being deployed that are targeted at advancing the market acceptance of its MPS offering.	3.00
Innovation/R&D pace and productivity	The vendor can articulate and demonstrate the results of both its internal and external investments in the current MPS offering, with particular emphasis on innovative and differentiating capabilities.	3.00
Financial/funding management	The vendor can articulate its investment in the MPS offering and demonstrate the effectiveness of this investment by market share, revenue, number of contracts, or other measurable results.	2.00
Employee management	The vendor can articulate and demonstrate its alignment of internal and/or external personnel resources that are helping make the MPS offering successful in the marketplace. The sales organization is organized and compensated to drive growth for the company.	2.00
Business capabilities total		10.00

Source: IDC, 2011

## FUTURE OUTLOOK

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### **IDC MarketScape: Worldwide Managed Print Services Market Vendor Assessment**

The IDC vendor assessment for the managed print services market represents IDC's evaluation of which vendors are well positioned today through current capabilities and which have strategies that will allow them to gain market share over the next few years. Positioning on the y-axis reflects the vendor's current capabilities and how well those capabilities are aligned to customer needs as well as how well a vendor is delivering and executing its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in the next three to five years. The strategy category focuses on high-level strategic decisions and underlying assumptions about offerings, customer segments, business, and go-to-market plans.

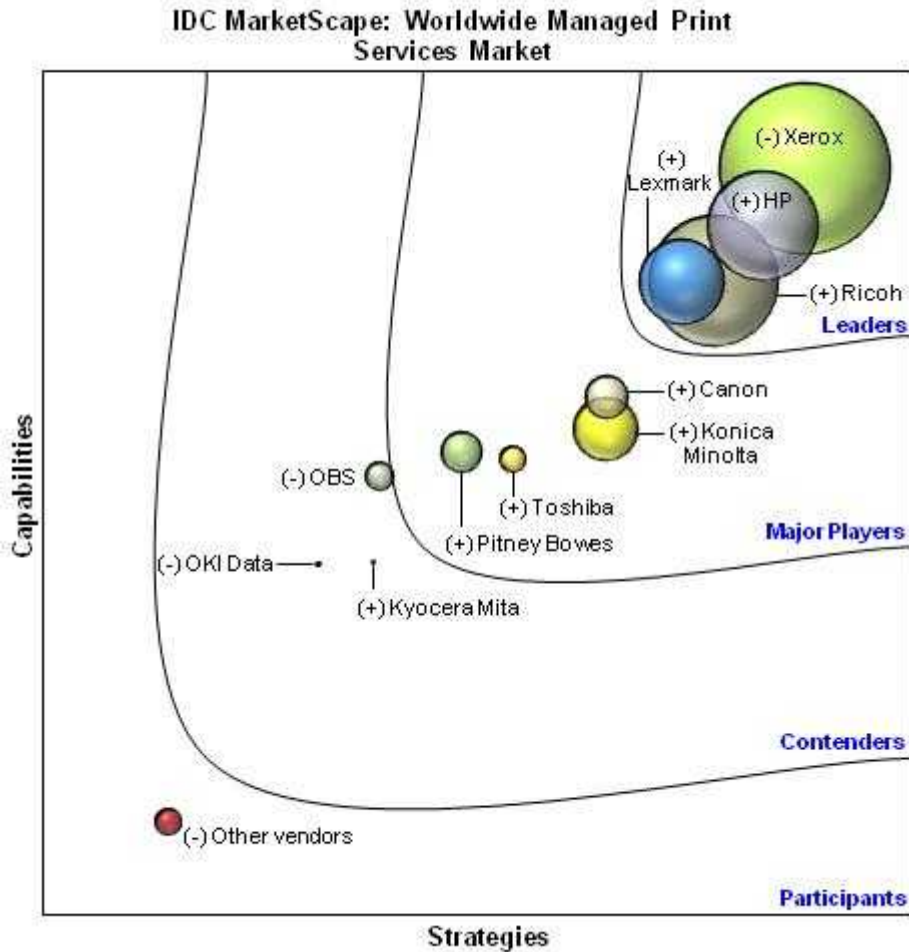
Figure 1 shows each vendor's position on the x-axis and y-axis. Additionally, a vendor's market size (as determined by direct MPS and BPS revenue) is indicated by the size of the bubble. Whether or not the vendor is growing faster than, slower than, or even with overall market growth is indicated by a (+), (-), or () icon, respectively.

Positioning on the grid is broken down into various groupings that reflect the combined view of a vendor with respect to both strategies (x-axis) and capabilities (y-axis). The groupings are defined as follows:

- ☒ Leaders are companies that have led and continue to lead the market in both breadth of offering and strategic intent. These companies have made the investments in service portfolios, go-to-market enablement, and delivery capabilities that set them apart from other vendors.
- ☒ Major Players are companies that have established and proven offerings in the market and have demonstrable success in delivering and delighting customers. These companies are "shadowing" the Leaders and exert competitive pressures via new capabilities, channel initiatives, and other differentiable capabilities that raise the bar for all vendors in the market.
- ☒ Contenders are companies that have defined managed print services capabilities but have delivery resources, technology infrastructures, and go-to-market coverage that are still being developed.
- ☒ Participants are companies that are in the process of developing a managed print service program or have initiated limited releases.

**FIGURE 1**

IDC MarketScape Worldwide Managed Print Services Vendor Assessment



Note: Vendor revenue estimates used to determine the bubble size in the MarketScape graphic reflect both managed print services and basic print services direct revenue. This revenue was generated from products and services delivered *directly* from the manufacturers to their end customers. This approach impacts the size of the bubble for vendors that primarily deliver MPS through indirect channels.

Source: IDC, 2011

Based upon the final scores (on the x-axis and the y-axis), we make the following high-level observations about the various players (see the Vendor Summary Analysis section for more detailed vendor analysis):

- ☑ Leaders in this managed print services IDC MarketScape assessment have scored the highest among all players in both the strategic and capabilities categories. All have robust portfolios and well-defined go-to-market strategies targeting growth globally, across company size and through both direct and indirect distribution channels.



- ☒ Several vendors are Major Players. As Major Players they have demonstrated in-depth knowledge of the market, the trends impacting the market, and how to leverage those trends for sustained growth.
- ☒ Vendors ranked as Contenders have programs that effectively address some, but not all, of the key trends and success factors at play in the market. These companies should not be discounted because of their current status. Each company has demonstrable strengths that make it a viable player. In addition, each company is aggressively pursuing growth in this market.
- ☒ Vendors ranked in the "other" category such as Dell, Sharp, Samsung, Brother, and Epson are working on developing their managed print services capabilities. IDC expects that as these programs grow and mature, the market will see increased competition.

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## **Vendor Summary Analysis**

This section covers the various vendors that were assessed in this IDC MarketScape and provides insights into their strengths. The assessment (and this section) only evaluates vendors' MPS capabilities, not BPS capabilities (for definitions, see the Definitions section).

### **Canon**

Canon is ranked as a Major Player in this IDC MarketScape analysis. The company's score for its offering strategy was particularly strong. Scores for go-to-market strategy, go-to-market capabilities, and business capabilities are also strong but a bit lower than other scores, indicating opportunities for development.

In 2011, Canon continued the global initiative announced in September 2009 in which the corporation announced the Canon Managed Document Services (MDS) brand and pledged to invest ¥20 billion yen (about US\$256 million at today's exchange rate of US\$0.2562 per yen) in the development of MDS infrastructure services and solutions over three years. Associated with that brand is a Five Phase Engagement Methodology intended to ensure consistency in approach but flexibility in delivery, worldwide.

In May 2011, Canon announced the formation of a new company, Canon Information and Imaging Solutions (CIIS). CIIS is a wholly owned subsidiary of Canon U.S.A. dedicated to expanding Canon's overall solutions business. The new company includes personnel from Canon's existing professional services team, and one of its missions is to support growth of Canon MDS (though the MDS business remains with the company's Imaging Systems Group [ISG]).

Canon is also building out support for its indirect partners. In September 2011, the company announced the launch of its new Partner Transformation Program, which provides professional services and business development tools to its dealer channel.

Canon's primary differentiator is the breadth of its technology, infrastructure, and solutions including Canon's imageWARE and uniFLOW product families as well as third-party solutions. The company continues to make significant investments in its R&D programs.

Canon continues its integration with Océ, after its acquisition of the company in 2009. At this time, Océ offers an MPS program through its Océ Business Services (OBS) division, functioning as a separate entity from Canon; therefore, we cover Océ independently in the Océ Business Services section. However, with Canon's well-developed distribution channel and OBS's document outsourcing history and expertise, and direct sales force, there are a number of apparent synergies that can be leveraged by each organization.

In last year's IDC MarketScape, we noted opportunities for Canon in the areas of verticalization of its MPS offering. Though Canon has geared its technology around the needs of specific industry segments, we would like to see increased support for specific business processes and business process reengineering as the market grows more sophisticated and looks to vendors for solutions well beyond fleet optimization.

## **HP**

HP has maintained its ranking as a Leader in this year's IDC MarketScape analysis. The company scored very high in both strategic and capabilities criteria, including offering strategy and business capabilities. HP's offering capabilities score, though quite strong, is a bit lower than its other scores.

HP's portfolio is at least partly driven by HP's broad range of HP and partner-enabled hardware and software solutions, including those that leverage HP innovations such as its FutureSmart device firmware and Open Extensibility Platform (EXP) device architecture as well as its HP Solutions Business Partner program. This portfolio includes solutions for specific vertical and business process document workflows. In addition, HP has significant momentum with secure mobile printing solutions with its ePrint family of offerings. It is worth noting that HP offers a broad portfolio of third-party partner solutions. The company has also acquired additional intellectual property with the acquisitions of Autonomy and Hiflex.

An important part of HP's strategy is to provide managed services and deliver a unified experience across office, onsite production, and external printing and imaging environments. This includes enterprise CRD/copy center, mailroom services, datacenter printing, centralized scanning, repositories, and customer communication management. In addition, HP is leveraging its network of print service provider (PSP) customers to provide MPS customers with access to external production resources. Currently, HP offers its Virtual Print Center (VPC), a Web-to-print solution, to provide MPS customers with desktop access to production-level capabilities. As noted previously, this cross-environment approach enables rightsizing of all print environments for greater cost savings, including ensuring that jobs are produced on the appropriate device for the desired results.

HP is a trusted name in the IT community, and the company continues to leverage this to its advantage to offer integrated IT and print management capabilities, including network management and security solutions. In the enterprise, HP continues to leverage its strengths in BPO/ITO, especially with those enterprises that want to fully outsource all their IT to one vendor. In addition, the IT reseller base is much larger than the office equipment base, potentially providing HP with a competitive advantage as it utilizes that channel for indirect MPS opportunities.

Last year we noted that an opportunity existed for HP to align its vast indirect channel to sell and implement managed print services to balance out its direct model and protect its hardware market share as well as to extend its footprint in growth markets. In 2011, HP has continued to buildout support and infrastructure for its indirect channel, including the acquisition of Printelligent in May. This acquisition provided HP with tried and tested tools for the channel that enables partners to scale engagements from the simple to the complex.

We expect to see HP continue development in all of these areas — including cross-environment support, cloud-based solutions, IT integration, and growing its indirect channel. In addition, HP is continuing to enhance its infrastructure for consistent global support.

### ***Konica Minolta***

Konica Minolta Business Solutions has moved from its ranking as a Contender in last year's IDC MarketScape analysis to a ranking of Major Player in this year's analysis. Konica Minolta has invested heavily in its MPS program and scored above the midpoint for all criteria, including both strategies and capabilities. The company was particularly strong in its score on go-to-market strategy. Its scores on offering capabilities, go-to-market capabilities, and business capabilities are also quite strong but a bit lower than other scores.

As the year closes, Konica Minolta is beginning to leverage its IT capabilities to the benefit of its Managed Print Services program. In January 2011, the company announced the acquisition of All Covered, a nationwide IT services firm focused on the SMB market. Subsequent to that acquisition, All Covered itself acquired several additional IT services practices.

In September 2010, the Konica Minolta's Optimized Print Services (OPS) program was rolled out globally, with a new focus on improving business processes in addition to fleet optimization and lowering document spend. The program is directed by a global OPS steering committee whose mission is to eliminate redundancies, capitalize on the efforts of regional subject matter experts, and share software solutions between regions.

In September 2011, Konica Minolta launched document management solutions for the education, legal, and healthcare vertical markets in partnership with Prism Software and integrated with Konica Minolta's line of bizhub MFPs. Though not specifically targeted at MPS engagements, these solutions can be leveraged, along with other programs, to provide vertical-specific workflows within these engagements. In fact, KBMS has hired industry experts to support vertical efforts and has established specific vertical/software partnerships such as that with Allscript's EHR product.

In addition to full support for Konica Minolta devices, the company provides first-line support for HP and Lexmark printers. However, ultimately, Konica Minolta believes that its key differentiator is its people who are rigorously trained and enable the OPS program.

Though Konica Minolta's "sweet spot" is small to midsize businesses, the company is competing in larger enterprise deals. We believe that KBMS is a company to watch, particularly for more mature enterprise-focused vendors that are expanding downmarket. Ultimately, Konica Minolta's success will depend on its ability to integrate and execute. We are not only referring to integration of the All Covered (and subsequent) acquisitions but also integration of its many software and hardware partnerships across multiple distribution channels and geographies.

### ***Kyocera Mita***

Kyocera Mita is new to this IDC MarketScape analysis and is positioned as a Contender in the market. The company scored the highest for business strategy and go-to-market capabilities, driven by its new global focus. Opportunities exist to expand its offering strategy and offering capabilities.

Delivering MPS through its Global Services organization is part of Kyocera's five-year growth plan. Kicked off in early 2011, the plan includes increased investments in personnel, training, information systems, and solutions. Global Services divisions have been established in all regions across the globe, and the company has instituted a global marketing team. In addition, the United States–based Certified MDS Dealer program is expanding into other regions.

Kyocera leverages its Hybrid Platform for Advanced Solutions (HyPAS) MFP architecture to provide a range of Kyocera and third-party solutions to its MPS customers. Kyocera's offerings are horizontally focused, though vertical solutions are on the radar.

Kyocera primarily distributes MPS services through its channel partners, though there are plans under way to enhance the direct sales force for larger global accounts. Today, Kyocera's target customer is the small to midsize (under 1,000 employees) organization.

There is training in place to shift channel partners from a box selling to solution sales approach. Indirect channels are currently supported on a regional basis, though Kyocera is in the process of developing additional programs to support indirect channel partners on a global basis to be launched in the first half of 2012. Kyocera has expanded its professional services organization to support both direct and indirect channels.

Kyocera views its MFP (ECOSYS) technology and HyPAS architecture as primary differentiators. These technologies are being leveraged to develop specific vertical and LOB solutions for customers. Though some regions are ahead of others, Kyocera understands the value of a business process approach to document workflows.

IDC believes that Kyocera Mita is making all right moves to build up its MPS program and become more competitive on a global level.

### ***Lexmark***

Lexmark scored highly in this year's analysis and is ranked as a Leader. The company offers a long-established MPS program that takes document services well

beyond device management and into business process transformation. Scoring on both strategies and capabilities criteria was well above the midpoint, with go-to-market capabilities particularly strong. Business strategy and business capabilities scores were also strong but a bit lower than other scores.

The Lexmark organization has been aligned by industry for some time, and that alignment extends to its MPS organization, solutions, and support. The company retains deep business process expertise for both front-office and back-office processes, and over 50% of its MPS engagements include some sort of sophisticated business process solution.

Global consistency is another strong focus area for Lexmark, from both an operational viewpoint and a technology perspective. The company has developed a single global system that includes meter reads, managing assets, technical support centers, dispatching service delivery, and billing. Global account programs include both sales and operational resources.

Lexmark can tout its technology ownership as a key differentiator. The company owns all of its core technology across services, software, and hardware, including its own technology for things like print release and document accounting. The advantage for the customer is more integrated and customized solutions that can be deployed more quickly. That said, the company notes that it has alliances with third-party vendors and expansion plans for third-party solutions and software.

In 2010, Lexmark acquired Perceptive Software, an ECM vendor with industry experience in the higher education, healthcare, and government segments. Though operating as a standalone software business within Lexmark, the company is leveraging Perceptive's solutions in MPS engagements.

While a significant part of Lexmark's MPS program is driven through its enterprise direct sales force, the company also provides MPS through channel partners and provides dedicated sales, training, operations, technical support, and administrative support for these partners. Partners are offered tiered programs to fit their needs and capabilities.

Opportunities exist for Lexmark to continue to drive its MPS practice through its indirect channel, particularly for small and midsize customers. As noted in last year's analysis, Lexmark may also have the opportunity to further extend its services and solutions into production printing environments and/or manage those environments to move volume to office devices.

### ***Océ Business Services***

Océ Business Services is an Océ business unit, and its MPS program is separate but closely aligned with Océ's MPS program. This IDC MarketScape analysis evaluates the OBS program. As noted previously (see the Canon section), this division continues to operate as a separate entity and has not yet been fully integrated with Canon as part of the Canon acquisition of Océ.

While a major player in document life-cycle services including centralized production, print and mail services, records and imaging services, and offshore business process

outsourcing, OBS is ranked as a Contender in our IDC MarketScape analysis. The company scored the highest on offering capabilities and business capabilities criteria. Opportunities exist in go-to-market strategy, business strategy, and go-to-market capabilities.

OBS has built its MPS strategy around vendor-agnostic third-party tools and its own vendor-agnostic Océ Universal Fleet Manager, making it strong in the management of heterogeneous environments.

The company obviously has the ability to offer additional value by integrating office output management with CRD, mail, imaging, records, and business process optimization services. The company offers a branded version of Mimeo's Web-to-print solution called Océ PrintExpress as an extension of the client's centralized print capabilities.

Since MPS is frequently integrated with other services in the OBS portfolio, OBS personnel are already onsite, enabling the company to cost effectively offer "fractional FTEs" in the form of fleet specialists. OBS has employees onsite at virtually all of its MPS engagements. About three quarters of the company's MPS engagement involve some sort of business process redesign through redesign and automation.

OBS delivers services regionally in the United States and Western Europe via a direct sales force. The company deploys a dedicated call center for MPS. Though there is no specific vertical focus for its MPS practice, the company is particularly strong in the legal, financial services, insurance, and manufacturing industries.

Opportunities exist for the company, and for Canon, as it begins the presumed integration with Canon's Managed Document Services. Together, the organizations have the opportunity to develop a robust cross-environment/cross-enterprise story for document services. Leveraging each other's strengths may put the combined organization in direct competition with today's leaders.

### **OKI Data**

OKI Data is committed to providing comprehensive MPS support to its indirect distribution partners worldwide, the company's primary MPS channel. OKI Data is rated as a Contender in this year's IDC MarketScape analysis. The company scores highest for business strategy and business capabilities criteria, driven by its innovative programs to support its indirect channel. Opportunities exist to expand its go-to-market strategy and offering capabilities.

In June 2011, OKI announced the expansion of the OKI Total Managed Print (TMP) Portal. OKI has distributed MPS-ready products since 2009 to further support its focus on MPS in the SMB market. By providing the core engine used by OKI in MPS engagements within the TMP Portal, dealers leverage the experience of numerous assessments and full cycle deployments. This allows the system to provide a robust set of features that can support SMB- to enterprise-level accounts. The TMP Portal was rolled out first in the United States, with other regions to follow.

The cloud-based TMP Portal features a flexible suite of nine brand-agnostic and proprietary services that can be tailored to complement and supplement a provider's

MPS model. It provides data capture, data analytics, a proposal generator, acquisition options, implementation services, remote monitoring, service and supply fulfillment, back-office billing, fleet optimization, and reporting. The infrastructure integrates with other third-party print management tools. The company is offering the core services free of charge to OKI channel partners, though there are for-fee services as well.

In the United States and Canada, a set of MPS specialists are available to support the indirect channel. Other OKI Data operating companies have similar support mechanisms. OKI is also in the process of developing Webinars that it will roll out to its partners covering topics such as sales engagement, change management, and business process transformation.

OKI's primary differentiator is its penetration and competency in the SMB space. OKI has invested significantly in the TMP Portal and the supporting ecosystem, and we expect continued enhancements and expansion of the solution. Opportunity areas for OKI include the extension of its MPS support to nonprint services such as scanning and other document-centric processes as well as vertical-specific solutions.

### ***Pitney Bowes***

Pitney Bowes is ranked as a Major Player in this IDC MarketScape analysis. The company scored at or above the midpoint scores for both strategies and capabilities criteria. Its score on offering capabilities criteria are particularly strong, likely driven by its long history of delivering document outsourcing services. Business strategy and go-to-market capabilities are a bit lower in this evaluation.

MPS is delivered by the Pitney Bowes Management Services (PBMS) business unit. Since the company does not manufacture printing or imaging equipment, PBMS positions itself as hardware agnostic, and as an integrator, leveraging best-in-class software and hardware solutions from hardcopy equipment manufacturers and third-party software providers. A Pitney Bowes Solution Consulting team configures applications to meet customer needs in specific vertical industries.

Pitney Bowes uses a direct channel to sell and market its offering. The company offers a full complement of services in the United States, Canada, and Western Europe and partners with hardcopy equipment manufacturers to extend those services globally. Its focus is on the Fortune 500 enterprise customer.

In addition to MPS, PBMS provides centralized production print and document management services, offsite production capabilities, and secure mail services, making it well positioned to support cross-environment/cross-enterprise engagements. PBMS can also leverage software solutions from the Pitney Bowes Business Insight (PBBI) business unit, including mailing, personalization and/or customization, customer relationship, and communication and location intelligence software.

PBMS differentiates itself by its hardware independence, long-standing outsourcing and consulting expertise, and the ability to cost effectively provide onsite support. The Pitney Bowes brand is well known and trusted among the Fortune 1000.

Opportunities for PBMS include global expansion and the development of solutions for the small to midsize market. Additionally, the company can better solidify and promote its pan-enterprise capabilities in multichannel customer communications across all imaging and production environments.

### **Ricoh**

Ricoh has maintained its ranking as a Leader in this year's IDC MarketScape analysis. The company scored high on both current portfolio and strategic portfolio criteria. Offering strategy, business strategy, and offering capabilities criteria scores are particularly strong. The score for business capabilities is strong but a bit lower than other scores.

In January 2011, Ricoh publicly announced an accelerated shift to a services-led business model. Ricoh's Managed Document Services (MDS) is the foundation of this global initiative. This initiative is well funded, with aggressive growth targets. The cornerstone of MDS is training, sales, and delivery processes that are standardized globally. The company deploys dedicated MDS professionals, supported by a comprehensive cloud-based toolset. In addition, the company announced the ChaMPS (channel MPS) dealer program to expand its coverage model to indirect channel partners. ChaMPS was initially rolled out in the United States but is adaptable as a global framework for channel support programs.

In October 2011, Ricoh announced MDS 2.0, a new, streamlined delivery framework designed to better address top customer concerns, including cost control, environmental sustainability, information security and governance, business process efficiency, organizational change management, information worker productivity, information optimization, and strategic infrastructure. As part of Ricoh MDS 2.0, Ricoh also unveiled a new global MDS Web site.

Ricoh's continued integration of IKON resources has resulted in one of the largest direct services operations in the world, with over 30,000 service professionals. Ricoh can also leverage IKON's heritage as a major player in centralized production print services to deploy a cross-environment/cross-enterprise approach to MDS.

Ricoh's development of its global scope (consistent global structure, governance, and process) is one of its biggest differentiators. The company's structured approach to MDS delivery is also distinctive and includes certified project managers following globally accepted PMI and PRINCE2 best practices to track, manage, and measure each engagement; ITIL/ISO 20001 certified professionals to ensure the transformed environment is effectively governed, measured, and continuously optimized; and certified change management professionals (Prosci ADKAR) to ensure the savings and productivity gains become a permanent part of the culture.

We expect to see continued growth and innovation from Ricoh as it continues to roll out its global infrastructure and delivery. Areas of opportunity for the company are development and promotion of business process and vertical solutions and further development of its indirect channel for MDS.



## **Toshiba**

As in last year's analysis, Toshiba is ranked a Major Player in this year's IDC MarketScape. All criteria were scored at or above the midpoint for both strategy and capabilities. The company's score for business strategy is particularly strong. Go-to-market strategy and offering capabilities are a bit lower.

Toshiba continues to develop its programs for both its direct and indirect channels, expanding the focus to document capture workflow as well as print. This year, Toshiba rolled out a new MPS curriculum for sales representatives.

Toshiba partners with HP and Lexmark to source both A4 MFPs and single-function printers, which are fulfilled through both distribution channels to supplement its own A3 product line. Software solutions are sourced from an assortment of third-party providers. Toshiba's own Encompass assessment tools is the cornerstone of its solutions.

Though Toshiba operates globally, MPS is delivered at the regional level. The company is in the process of evaluating a more global approach.

In addition to a global methodology, other opportunities for Toshiba include continued development of its software and solutions portfolio, including vertical-specific products and services. Expanding print services into the area of production print presents another growth opportunity.

## **Xerox/Fuji Xerox**

Xerox, along with its Asia/Pacific partner Fuji Xerox, continues to rank highly in our evaluation, achieving top scores in both strategic outlook and current capabilities. Xerox is ranked as a Leader in our IDC MarketScape analysis. Scoring on the offering strategy and capabilities criteria were particularly strong. Business strategy scoring is strong but a bit lower than other scores.

A services-led strategy is a top corporate growth priority for Xerox, and MPS is a critical element of that strategy. Xerox has developed a continuum of services to serve companies of all sizes through both a direct and an indirect distribution channel. In 2010, the company launched its Xerox Partner Print Services (XPPS) program for channel partners, which includes training and mentoring along with business development, marketing, services, and support. The company continues to develop and ramp up this program.

Consistent global delivery capabilities are a key differentiator for Xerox, and the company continues to buildout its infrastructure for global support, including support for indirect channel partners.

Xerox recognizes that customers are looking to address business priorities beyond simply reducing print costs, and it utilizes its Xerox Office Services (XOS) tool suite and Xerox Extensible Interface Platform (EIP)-enabled MFPs as well as third-party offerings to provide business process workflow and vertical solutions for its customers. The company also leverages the vertical and business process expertise resident in the ACS acquisition. Xerox believes that one of its key differentiators is the

ability to deliver sustainable cost savings over the life of a contract. The majority of Xerox's Enterprise Print Services (EPS) engagements result in the reengineering of the business process workflows, primarily in the United States and Western Europe.

A long-time provider of centralized print and mailroom services, Xerox has invested in enhancing its centralized print offering and linking it into the office to make the print room easily accessible to the office worker. These capabilities extend to the mobile and remote worker environments to truly manage all of a customer's print spend. Xerox leverages its Xerox Premier Partner network of printers for the production of commercial print.

In 2011, Xerox acquired NewField IT, and it is leveraging NewField's assessment tools to streamline the assessment process. Also in 2011, Xerox and Cisco announced an alliance that made Xerox's MPS and mobile print offerings more available to the midmarket by enabling Cisco's vast reseller channel and integrating print usage tracking into Cisco routers/switches.

Because Xerox is the largest MPS provider with high penetration in large enterprises, growth opportunities for Xerox include continued expansion of its direct and indirect channel programs, with a specific focus on growing its base of small and midsize customer organizations as well as continued expansion of its Alliance program through partners like Cisco and HCL. Another opportunity is to extend its enterprise business process services beyond the United States and Western Europe. Finally, we expect to see continued integration between Xerox's print-related services and the BPO/ITO capabilities offered by ACS.

### ***"Other" Vendors***

There are several other firms, including Dell, Sharp, Samsung, Brother, and Epson, that either are in the planning stages of developing managed print service programs or have already initiated programs for their channel. IDC believes that these companies will intensify the competition for MPS, especially through the indirect channel.

## **ESSENTIAL GUIDANCE**

As noted previously, there are a number of key trends emerging in the dynamic MPS marketplace and, in many cases, these trends translate into factors for vendor success. These, in turn, drive our essential guidance for hardcopy vendors:

- ☒ **Ensure consistent delivery, regionally, multinationally, and/or globally.** Cost and productivity efficiencies are to be gained by standardization for both provider and customer. Consider that consistency refers to uniformity of products (both hardware and software), services and pricing, standardized training of sales and support personnel, seamless infrastructure for ongoing customer management, globally integrated sales force, and billing at regional and global levels. Furthermore, these programs should extend to both direct and indirect distribution channels.

- ☒ **Develop professional services capabilities around both horizontal and industry-specific document processes.** This means having the business process and vertical expertise to understand a customer's environment and pain points and then craft the best combination of technology and services to meet real customer requirements. While customizable, these solutions should be built upon a standard toolset for consistency and cost-effective deployment.
- ☒ **Extend direct capabilities to the indirect channel, including training, business development, and marketing support in addition to the products and services portfolio.** Cloud computing architectures are enabling cost-effective deployment of even sophisticated capabilities.
- ☒ **Expand the MPS program's focus beyond fleet management and the office.** Additional sources of print "pain" reside in production print facilities (CRD/copy center, datacenter, mailroom) and in the commercial purchase of print. Vendors should adopt a holistic view of printing and related costs for further optimization and customer value.
- ☒ **Leverage technology to address customers' security concerns.** A continuum of solutions may be required to address a range of security requirements. Solutions should extend to mobile and remote workers.
- ☒ **Develop IT capabilities and partnerships.** While we don't recommend that all print services vendors also become IT outsourcing providers, access to IT management capabilities through partnerships can provide access to a broader customer base. The office equipment channel in particular would benefit from such access.

All vendors should continue development of their services portfolio, particularly in areas that provide greater differentiation and/or address the specific recommendations, while considering the optimal go-to-market strategies and delivery mechanisms for specific target markets. The MPS market is still growing, but it is also maturing with some components rapidly entering the realm of commodity. Vendors should leverage traditional strengths, as well as develop new competencies, to develop a foundation for moving into more complex service arenas.

## LEARN MORE

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### Related Research

- ☒ *Hardcopy Device Usage — Digitization of Paper-Based Workflows, By Company Size* (IDC #231333, November 2011)
- ☒ *Worldwide and U.S. Document Solutions 2011–2015 Forecast* (IDC #230756, October 2011)
- ☒ *Worldwide and U.S. Outsourced Print and Document Services 2010–2014 Forecast and Analysis* (IDC #224913, September 2010)

- ☒ *Managed Print Services — Global Market and Provider Analysis* (IDC multiclient study, December 2009)
  - ☒ *Managed Print Services By Vertical Industry and Company Size: Penetration Rates, Cost Savings, Decision Making* (IDC #218107, April 2009)
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## **Synopsis**

This IDC study is the second vendor assessment of the managed print services market using the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in this growing market. This study is composed of two sections. The first section describes characteristics that IDC believes lead to success in the managed print services market. These characteristics are based on vendor surveys conducted for this study, IDC's buyer surveys, and analyst observations of best practices. The second part of this study is a visual presentation of the resulting vendor analysis in a single bubble chart. This display concisely exhibits the quantified scores of the reviewed vendors along two axes — strategies and current capabilities — which determine if the vendor is a Leader, a Major Player, a Contender, or a Participant. In addition, vendor market size and growth relative to the whole market are shown. This section also provides vendor summaries that discuss IDC's positioning of each vendor in the market along with commentary on strengths reflected in their scoring and opportunities for improvement. The document concludes with IDC's essential guidance to vendors in support of growth and improved offerings.

"The managed print services market continues to mature and evolve, offering customers greater value and challenging vendors to continually evaluate and enhance their product and services portfolios," said Holly Muscolino, research director for Hardcopy Peripherals: Software and Services. "This study identifies the Leaders, Major Players, Contenders, and Participants that make up the current MPS landscape and reflects on the strategies and capabilities needed to be successful."

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