

# IDC MarketScape: Worldwide Cloud MPS Hardcopy 2022 Vendor Assessment

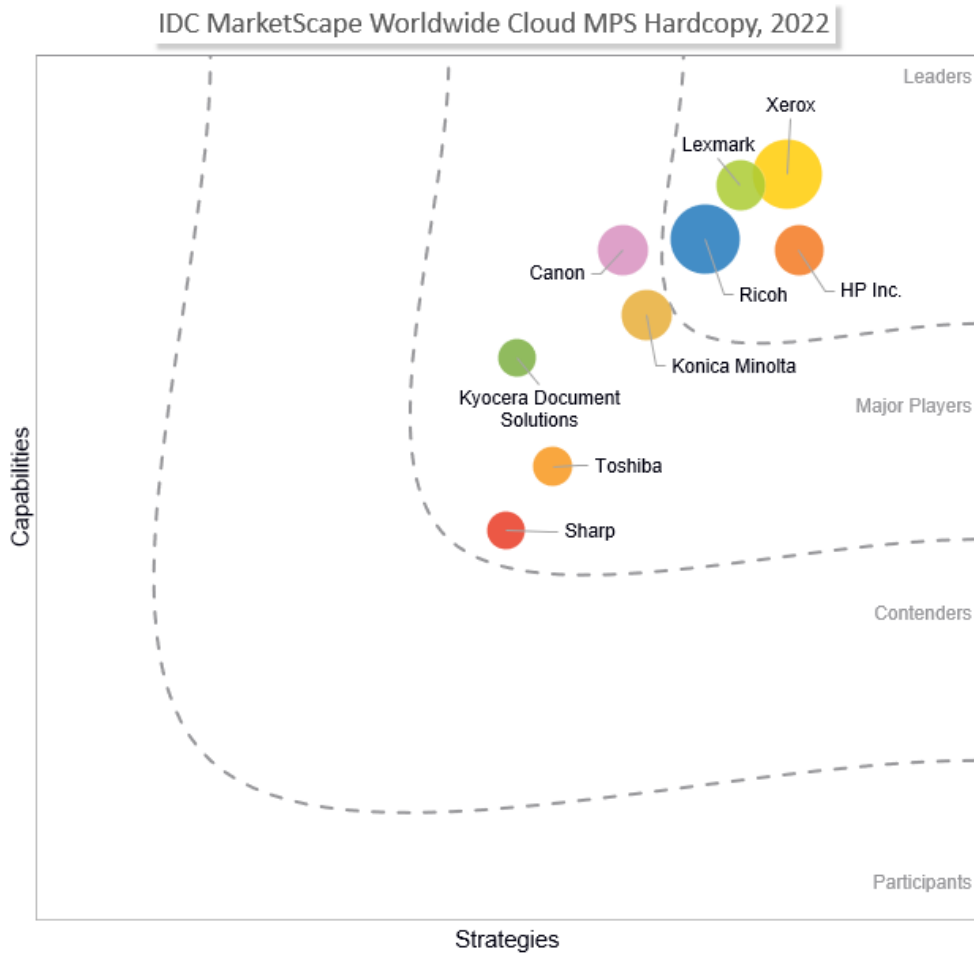
Robert Palmer

THIS IDC MARKETSCAPE EXCERPT FEATURES RICOH

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Cloud MPS Hardcopy Vendor Assessment



Source: IDC, 2022

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Cloud MPS Hardcopy 2022 Vendor Assessment (Doc # US47337721). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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This IDC study assesses the market for cloud-based managed print services (MPS) as well as other cloud-based contractual print service models to target both enterprise and SMB. Businesses face significant challenges today with increased demand for hybrid work options. From a print perspective, needs have evolved beyond simply equipping remote workers with printers in the home. To support the long-term needs of the hybrid workforce, organizations must support users across a wide range of network configurations.

Meanwhile, there is growing desire to manage at-home or remote printing devices more effectively through usage monitoring, improved security measures, providing remote access to advanced print and document services, and providing for ways to track usage and reimburse printing expenses. Increasingly, organizations are looking to cloud-based print and print services to address these needs. The value proposition of cloud-based MPS is consistent with current IT trends, including an ongoing shift to cloud computing to eliminate IT infrastructure, the need to reduce operational costs, drive operational efficiencies, and free up IT resources for more strategic programs.

This assessment discusses both quantitative and qualitative characteristics that position vendors for success in this important market. This IDC MarketScape covers a variety of hardcopy vendors and is based on a comprehensive framework to evaluate cloud-based print capabilities as standalone services and solutions, within the context of a managed print and document services (MPDS) engagement, and as non-MPDS programs and services. Organizations using the IDC MarketScape for cloud-based MPS can identify vendors with strong offerings and well-integrated business strategies aimed to keep the vendors viable and competitive over the long run. Capabilities and strategy success factors identified from this study include:

- Vendor capabilities and strategy for provisioning, deployment, and delivery of cloud-based print services
- Strategies to address cloud-based print management, next-gen print infrastructure as a service, new billing structures and business models (including print as a service), print and document security, enabling the hybrid workforce, and channel enablement
- Capabilities to support a fully hosted cloud-based print acquisition and delivery model designed to simplify the acquisition and management of printing hardware and services
- A full range of cloud-based print services offerings, ranging from simple cloud-based printing or secure print to programs that allow customers to outsource the entire print infrastructure, including printing hardware, print servers, and print-related solutions and services
- Solutions designed to address cloud print management, cloud-based secure scan and print, intelligent capture and workflow automation, ECM and/or document management, and other horizontal- and vertical-specific applications
- Ability to support a wide range of pricing models and billing structures, including SaaS-based offering that can be sold under a subscription-based billing model

- IoT-enabled hardware and analytics combined with mobile-ready technologies to drive business insights and inform critical decisions around process improvement and workflow automation
- A road map to address specific end-user challenges related to advancing print and document maturity, enabling the remote/hybrid workforce, and securing the print and document infrastructure
- Ability to address core competencies in MPS, including assessment, design, optimization, device and supplies management, governance and change management, end-user support, tracking, reporting, security, billing and invoicing, mobility, and support for remote users
- A holistic approach to delivering horizontal and vertical solutions and services through both direct and indirect channels

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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This document includes an analysis of nine major hardcopy equipment manufacturers with broad services and solutions portfolios to specifically address the needs for cloud-based print services on a global scale. Participation in this study was extended to hardcopy vendors that offer managed print and document services programs through direct and indirect channels, with total MPS revenue exceeding \$50 million in 2020. Excluded from the study were IT outsourcing companies, business process outsourcing (BPO) providers, and software manufacturers that either offer print and document services as part of their IT services or subcontract these services to hardcopy vendors. Indirect channel partners of hardcopy equipment manufacturers have also been excluded from this study.

## ADVICE FOR TECHNOLOGY BUYERS

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Businesses of all sizes are showing increased interest in cloud-based print and print management to not only reduce costs but also lessen the burden on IT and move to a more flexible, predictable billing model. While cloud migration was already well underway, the COVID-19 pandemic has had a dramatic impact on how work gets done, leading to more remote employees and the need to create stable and secure work-from-home (WFH) environments.

A recent study from IDC shows how technology adoption within the print infrastructure has changed since the onset of the COVID-19 pandemic. In fact, IDC's research shows that 46% of businesses are looking to move to cloud-based printing and/or print management in the near future. For more information, see *IDC Survey Spotlight: Adoption of Cloud-Based Print Management Solutions* (IDC #US48334621, October 2021).

Just as important, the study indicates little difference in outlook between large enterprises and their SMB counterparts. At the enterprise level, there is considerable need to optimize print to achieve availability and scalability while ensuring that lingering legacy print infrastructure does not impede digital transformation initiatives. For the SMB customer, cloud-based MPS provides a platform to enable a range of print- and document-related services at various entry points and cost/billing models.

Meanwhile, the need to provide better security for remote devices while ensuring data protection and privacy is an important area that is driving increased interest around cloud-based printing. IDC expects to see broader deployment of cloud-based print management tools and infrastructure as businesses look to leverage IoT and data analytics to provide better management and support, not only around security but also for proactive and predictive service to improve productivity and lessen the need for onsite service technicians.

Accordingly, organizations should consider the following:

- **Understand print needs for the distributed workforce:** Organizations moved quickly to enable their employees to work from home more effectively. From a printing perspective, however, initial stopgap measures adopted during the earlier stages of the pandemic are likely inadequate for long-term requirements.
- **Support the hybrid workforce:** Put plans in place to account for an increase in the number of part-time or permanent WFH employees. Transitioning to a distributed workforce places emphasis on managing additional outside assets, and this will put increased strain on IT resources that may already be stretched. Leveraging a cloud-based MPS program, organizations can offload certain responsibilities for managing the print environment and reduce burden on IT resources.
- **Ensure that consistency is key:** It will be important for organizations to ensure a convenient, consistent, and seamless printing experience for employees, regardless of where they are working. When looking to enable employee productivity in a hybrid workforce, it is essential for home-office settings to mimic traditional office settings.
- **Consider print in corporate governance:** Consider how print infrastructure fits within corporate governance policies while identifying best practices for maximizing security and data protection in a hybrid working model. This should include measures such as cost controls for hardware acquisition and supplies expense reimbursement; remote monitoring, management, and service/support; better visibility into print usage and spend; and improved security measures, content protection, risk mitigation, and threat remediation. Cloud-based print management tools are essential for effective monitoring and management of remote, off-campus devices.
- **Drive greater value from your existing MPS program:** Enterprise organizations already involved in an MPS engagement can realize significant benefits by moving to a cloud-based delivery model. Businesses should consider shifting the focus away from optimizing print assets and more toward driving better business outcomes around improved uptime, scalability, sustainability, and security and enabling a "print from anywhere to anywhere ecosystem."
- **Look to hardcopy vendors for support:** Seek assistance from technology suppliers and print service providers to determine the best approach for deploying a cloud-based print management solution, including the differences between self-managing versus a solution deployed as part of a managed services offering.
- **Consider financial considerations:** Look for flexibility in financing options, with monthly billing models and predictable costs. It is also important to consider how your organization will manage the reimbursement of printing expenses for remote employees.
- **Where are you on your cloud journey?** Consider how deploying cloud-based print management tools will fit within the organization's long-term objectives around digital transformation and cloud migration. Organizational needs vary greatly depending on company size, industry, and print volumes. Businesses will need hybrid printing solutions tailored specifically to meet their organizational needs.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### Ricoh

Ricoh is a Leader in this IDC MarketScape for cloud-based MPS as well as other cloud-based contractual print services worldwide. Ricoh is a public company headquartered in Tokyo, Japan.

Ricoh strives to help organizations meet the challenges of today's business climate while achieving a sense of fulfillment through work. Recognizing important issues driving digital transformation and a continued transition to the hybrid working model, Ricoh stresses the importance of work-life balance and the need to enable an "anytime anywhere smart workstyle." To achieve that goal, Ricoh works to help organizations secure and leverage information to connect people while providing extended services so that employees can work whenever and wherever they want.

Ricoh's strategy is based on six key pillars that help position the firm as a digital services company, beginning with the customer. The first pillar is Ricoh's customer-first approach: working closely with customers to help them along their own digital transformation journey by identifying specific business challenges and mapping out a plan to meet long-term objectives. Ricoh's integrated sales force serves as the second pillar of its strategy. While it has been focused in this area for a while, Ricoh has worked hard to better align its sales force with customer needs, earning the right to engage early and drive meaningful customer dialogue throughout the engagement process. The third pillar is digital innovation, which is grounded in Ricoh's legacy of capturing, protecting, and connecting information with those who need it. Ricoh groups the final three pillars in its overall strategy together under a single umbrella: digital capabilities, Ricoh's own digital transformation efforts, and driving synergies with graphics communications business.

Meanwhile, Ricoh has also developed a compelling sustainability strategy, not only for its own business but with solutions and services designed to help customers address key sustainability metrics within their own organization. Ricoh's overall sustainability strategy is grounded in an approach for balancing what the vendor refers to as the Three Ps: prosperity (economic), people (society), and planet (environment).

Ricoh has a long and storied history in the MPS market, developing a market leadership position while driving innovation in key areas around scalable solutions, flexible MPS infrastructure, user experience, security, optimized device/fleet management, and workflow solutions and services. Ricoh continues to improve the functionality, delivery, and overall value of its various print and document services through a cloud-first strategy designed to enable a versatile subscription-based services model with multiple entry points. With its managed print-as-a-service (MPaaS) platform, Ricoh has created a cloud-based offering to help organizations reduce or eliminate print infrastructure while moving to a business intelligence platform for optimizing document processes and managing both digital and physical assets.

The MPaaS architecture provides Ricoh with a singular ecosystem with the flexibility and scalability needed to address all customer segments and delivery models, from direct engagements with large enterprise accounts to midmarket and SMB customers working through Ricoh's indirect channel partners. As it has expanded its print services approach, Ricoh has shifted its focus from simply driving operational efficiencies to more toward enabling high-value work, leveraging the cloud and data analytics to drive better business results.

Meanwhile, the MPaaS platform provides a standardized and modular approach so that customers can select from the full range of traditional MPS capabilities, including print and device management software, application administration and management, device policy and configuration management, infrastructure management, and physical device management services. With this modular approach, customers can select only those components that are most required for the initial engagement, with the ability to add components and expand along with company needs.

### ***Strengths***

Ricoh's global services infrastructure combined with its worldwide geographic coverage is a key differentiator for the firm. Ricoh currently operates in more than 198 countries, with 98,000 employees worldwide and over 14,000 technical engineers. With its global presence and solid base of technology assets and subject matter experts, Ricoh is in a strong position to meet the expansive needs of global, regional, and local customers.

Over the years, Ricoh has developed a broad portfolio of print- and document-related services, with the ability to support varied engagements ranging from simple, one-off solutions to end-to-end turnkey services engagements. Meanwhile, Ricoh's cloud-based MPaaS platform is uniquely positioned to provide customers with a comprehensive path toward digital transformation, providing a technology-agnostic approach that allows customers to pick and choose from a full menu of services that can scale to meet the evolving needs of the organization.

### ***Challenges***

In recent years, Ricoh has taken steps to reposition itself as a digital services company, highlighting its work in key areas such as digital transformation, information management, cybersecurity, and future of work. While these efforts are strategically important for Ricoh, IDC believes that Ricoh needs to continue to stress the importance of its heritage in print and document services.

### ***Consider Ricoh When***

Organizations should consider Ricoh when looking for scalability and flexibility in a cloud-based print services architecture. This is particularly beneficial for those customers looking for a phased approach to limit up-front investment while providing an easy path for program growth as needs expand. Ricoh should also be on the short list for those customers looking specifically for vendors to support a globalized cloud-based print services program, with the ability to provide consistency in global service delivery and support.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute 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 three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, 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 Definition

The focus of this IDC MarketScape is on the strategies and capabilities the vendor has at its disposal to support delivery of managed print services (MPS) through a cloud acquisition and deployment model. The study considers the various programs and delivery models that vendors can provide in the area of print as a service and subscription-based print services. Other important definitions to consider as part of this study are discussed in the sections that follow.

### *Managed Print and Document Services*

- **Third-party management of a fleet of printers and/or MFPs under a multiyear agreement.** Coverage includes, at a minimum, ink/toner and maintenance/repairs. It may also, optionally, include hardware.
- **Contract.** The contract may also cover management of an in-plant, central reprographic department (CRD); copy center; or datacenter; however, it must be included in the distributed office environment. The contract includes a remote monitoring solution while acknowledging the fact that nonnetwork-connected machines would require manual monitoring.
- **Detailed assessment.** It provides provider analysis of the organization's actual print/copy usage and recommends an output strategy for optimization with defined goals.

- **Fleet usage analysis/reporting.** It includes ongoing analysis, reporting, and recommendations against predefined goals.
- **Ongoing optimization.** With proactive management, usage of the provider's resources is to continuously manage the environment toward contract goals.
- **Governance.** It established business rules and/or a formal change management program with education and incentives to get employees and their managers to achieve and sustain contract goals for printing and document workflows.
- **Benefits to the user.** MPDS is a comprehensive model for achieving increased cost savings, improving productivity, driving process efficiencies, meeting security and regulatory compliance, and supporting sustainability policies and goals.

### ***Next-Gen Print Infrastructure as a Service***

- Provides all the benefits of traditional MPS through a cloud-based deployment and delivery model
- Fully hosted cloud-based print acquisition model designed to simplify the acquisition and management of print
- Outsource the entire print infrastructure, including printing hardware, print servers, and print-related solutions and services
- Sold as a SaaS-based offering under a subscription-based billing model
- IoT-enabled hardware and analytics combined with mobile-ready technologies to drive business insights and inform critical decisions around process improvement and workflow automation



## LEARN MORE

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### Related Research

- *MPDS Benchmark Survey, 2021: MPDS Adoption and Implementation* (IDC #US48334121, October 2021)
- *IDC FutureScape: Worldwide Imaging, Printing, and Document Solutions 2022 Predictions* (IDC #US48287621, October 2021)
- *IDC Survey Spotlight: Adoption of Cloud-Based Print Management Solutions* (IDC #US48334621, October 2021)
- *Market Analysis Perspective: Worldwide Next-Gen Document Services, 2021* (IDC #US47102521, September 2021)
- *Worldwide and U.S. Managed Print and Document Services and Basic Print Services Forecast, 2021-2025* (IDC #US46358821, July 2021)
- *Worldwide and U.S. Managed Print and Document Services and Basic Print Services Market Shares, 2020: The Modernization of Print* (IDC #US46358921, July 2021)
- *IDC MarketScape Criteria: Worldwide Cloud MPS 2021 Vendor Assessment* (IDC #US47726121, June 2021)

### Synopsis

This IDC study assesses the market for cloud-based managed print services (MPS) among foremost global hardcopy vendors and identifies their strengths and challenges. This assessment discusses both the quantitative and qualitative characteristics that position the vendors for success in this important market. This IDC MarketScape covers a variety of hardcopy vendors and is based on a comprehensive framework to evaluate cloud-based MPS delivered as standalone services and solutions, within the context of a managed print and document services (MPDS) engagement, and as non-MPDS programs.

"Changes in work processes and work culture combined with the evolving needs of the extended (or distributed) workforce will place greater emphasis on the need for cloud-based print services," says Robert Palmer, research vice president for IDC's Imaging, Printing, and Document Solutions group. "IDC expects to see broader deployment of cloud-based print management tools and infrastructure as businesses look to leverage IoT and data analytics to provide better management and support while enabling a print from anywhere to anywhere ecosystem."

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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