ACT: Print Industry Ecosystem Leadership

How Automation and AI, Cloud, and Technology Ecosystems are Reshaping the Print Industry

Print Industry Ecosystem Leadership – The ACT Framework
Excerpt report: MPS Monitor

QUOCIRCA

Introduction

The print industry is characterised by ongoing margin pressure, market consolidation, and declining print volumes. Industry players face an urgent imperative to reinvent business models, diversifying to capture broader opportunities around software and services, as organisations accelerate digitisation initiatives. The reality is clear: print now sits inside a broader digital ecosystem, not alongside it. Customers expect seamless alignment with cloud platforms, identity systems, security architectures, and applications.

At the same time, influence is shifting decisively towards IT service providers, which are better positioned to deliver integrated, cloud-aligned solutions. By 2030, they are expected to hold the deepest customer relationships around print infrastructure, signalling a redistribution of influence that traditional print vendors and channel partners cannot ignore.

This requires an integrated ecosystem of OEMs and ISVs, each contributing distinct strengths across the print and digital value chain. OEMs bring deep expertise in device engineering, firmware security, fleet optimisation, and edge intelligence, while ISVs lead in cloud-native print management, workflow automation, analytics, and AI-driven information services. Sustainable leadership is created when these capabilities are aligned through strategic partnerships. Competitive advantage, therefore, increasingly depends on the ability to integrate, collaborate, and deliver outcomes across the wider technology ecosystem. The industry players that thrive in the next decade will be those that embrace this shift now.

In response to this challenge, Quocirca is introducing the ACT framework. We designed this framework as a strategic blueprint to help print vendors and channel partners navigate this critical shift. ACT, which stands for Automation and AI, Cloud, and Technology Ecosystems, provides a structured framework to move beyond legacy business models and into the future of strategic, software-defined, consultative value-add services.

Methodology

Vendors submitted a written response to Quocirca's request for information on ACT services and solutions. This report only includes profiles of vendors that provided submissions to participate in this study. These include:

- **Print vendors/manufacturers:** Brother*, Canon, Fujifilm Business Innovation*, Epson*, HP, Katun, Konica Minolta, Kyocera*, Ricoh, Sharp, Toshiba*, and Xerox
- **ISVs:** Celiveo 365*, Datasec Solutions, ezeep/Thinprint*, MyQ, LRS*, MPS Monitor, PaperCut, Pharos, Tungsten Automation, Vasion, and Y Soft*

**Please note that certain vendors that did not formally participate in this research cycle have been positioned based on existing Quocirca research, historical data, and extensive analyst knowledge of the market.*

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Key findings

- **Quocirca's ACT study establishes a strategic framework for assessing how effectively print industry vendors are adapting to a services-led, software-defined, ecosystem-driven market.** ACT Leaders, Innovators, and Major Players are categorised across both vendors/OEMs and ISVs and defined based on global vision and strategy across Automation and AI, Cloud, and Technology Ecosystems. Together, these pillars define the capabilities required for long-term relevance in the modern print ecosystem.
- **ACT moves the industry conversation away from hardware-centric propositions towards integrated digital services, outcome-based value, and strategic partnerships.** Print now operates as part of a wider digital workplace and IT services landscape. Customers increasingly expect print infrastructure to align with cloud platforms, identity systems, security architectures, and workflow automation tools. ACT provides a consistent lens through which to assess how well vendors can support these expectations today and evolve alongside them in the future.
- **Quocirca ACT Leaders demonstrate a global vision and strategy, along with mature offerings across each of the ACT pillars.** Print vendor/OEM Leaders include Canon, HP, Konica Minolta, Ricoh, and Xerox.
    - **Canon** demonstrates strong leadership across all three ACT pillars, combining advanced device intelligence, mature cloud platforms, and a broad ecosystem of software and services partners to support end-to-end document and workflow automation.
    - **HP** excels in its strong focus on AI-enabled products and solutions, a mature cloud solutions portfolio, and a broad and diverse partner ecosystem.
    - **Konica Minolta** shows a clear shift from hardware-centric offerings towards cloud-first, analytics-driven, and AI-enabled digital workplace solutions, underpinned by strong hyperscaler and ISV partnerships.
    - **Ricoh** is transitioning towards a digital services-led model, with applied AI, cloud platforms, and workflow automation integrated into managed and outcome-based services.
    - **Xerox** stands out for the breadth and maturity of its ACT execution, with Automation and AI embedded across devices, cloud platforms, and services, supported by a strong ecosystem strategy and expanding IT services capability.
- **ISV Leaders include the most established print management vendors that have developed a cohesive strategy across their portfolio.** This includes PaperCut, Pharos, Tungsten Automation, and Vasion.
    - **PaperCut** continues to evolve from print control into a cloud-orchestrated, security-focused platform that integrates print into modern identity and collaboration ecosystems.
    - **Pharos** positions print as an enterprise-grade operational asset, delivering secure, scalable cloud print management with strong governance and analytics.
    - **Tungsten Automation** brings enterprise-scale intelligent document processing, workflow orchestration, and automation into the print ecosystem, strengthening the connection between capture, print, and business processes.
    - **Vasion** reframes print through its Intelligent Print Automation model, unifying serverless print, output management, and document workflow automation within a cloud-native platform.
- **Innovators are driving innovation and disruptive technology across their product and service portfolio.** These include Datasec Solutions, Epson, MPS Monitor, and Sharp.
    - **Datasec Solutions** focuses on identity-first, cloud-native print and document workflows, extending zero-trust and Microsoft 365 governance directly to the device level.
    - **Epson** continues to disrupt the traditional laser-dominated office market with its proprietary PrecisionCore Heat-Free inkjet technology, delivering energy efficiency and improved sustainability.
    - **MPS Monitor** enables dealers to move from reactive monitoring to proactive, data-driven fleet and service management through a cloud-native, analytics-led platform.

  - **Sharp** is evolving into a broader workplace technology and services provider, strengthening its ACT positioning through cloud platforms, managed services, and a growing IT and security ecosystem.

- **Major players are defined by established execution and specialist expertise.** This category includes Katun, which is developing its ACT capabilities through a partner-led, open-architecture approach, with a focus on secure hardware foundations, telemetry, and data-driven service enablement.

Quocirca's ACT Leadership Assessment

Quocirca's ACT leadership assessment evaluates vendors in these critical areas, defining their market position as **Leaders, Innovators, or Major Players**. The assessment is conducted in three key phases:

- **Research.** This is based on current assessments carried out across our flagship Vendor Landscape studies.
- **Evaluation against the ACT framework.** Each vendor is scored against a set of predefined criteria aligned with the **ACT** framework:
    - **Automation and AI.** Assessment focuses on the maturity of the vendor's IDP capabilities, real-world effectiveness of their workflow automation tools, and sophistication of their predictive analytics for device management.
    - **Cloud and Collaboration.** We evaluate the strength of their cloud-native solutions, their ability to support hybrid environments, and the depth of their integrations with leading collaboration platforms such as Microsoft 365 and Google Workspace.
    - **Technology Ecosystems.** The analysis examines the breadth of each vendor's strategic partnerships, the openness and security of its APIs, and its ability to provide value-added services beyond traditional print.
- **Defining leadership categories.** Based on the evaluation, vendors are positioned within three categories:
    - **Leaders.** These vendors demonstrate a strong vision for the future and have proven global execution. They offer a comprehensive suite of solutions across all three pillars of the ACT framework and are widely recognised as market pacesetters, driving customer transformation and innovation.
    - **Innovators.** These vendors have a strong market presence and disruptive capacity and are executing effectively, but they may have a less developed vision or a portfolio that is not yet fully mature across all three pillars of the ACT Framework.
    - **Major players.** These vendors possess a compelling vision with disruptive potential and may have regional strengths and specialist expertise.

The Quocirca ACT Leadership Landscape

The ACT Leadership Landscape provides a comprehensive, detailed view of the evolving print ecosystem, encompassing the market positioning of both OEMs (original equipment manufacturers) and ISVs (independent software vendors). This complements, and should be read in conjunction with, our current Vendor Landscape reports.

Please note that certain vendors that did not formally participate in this research cycle have been positioned based on existing Quocirca research, historical data, and extensive analyst knowledge of the market.

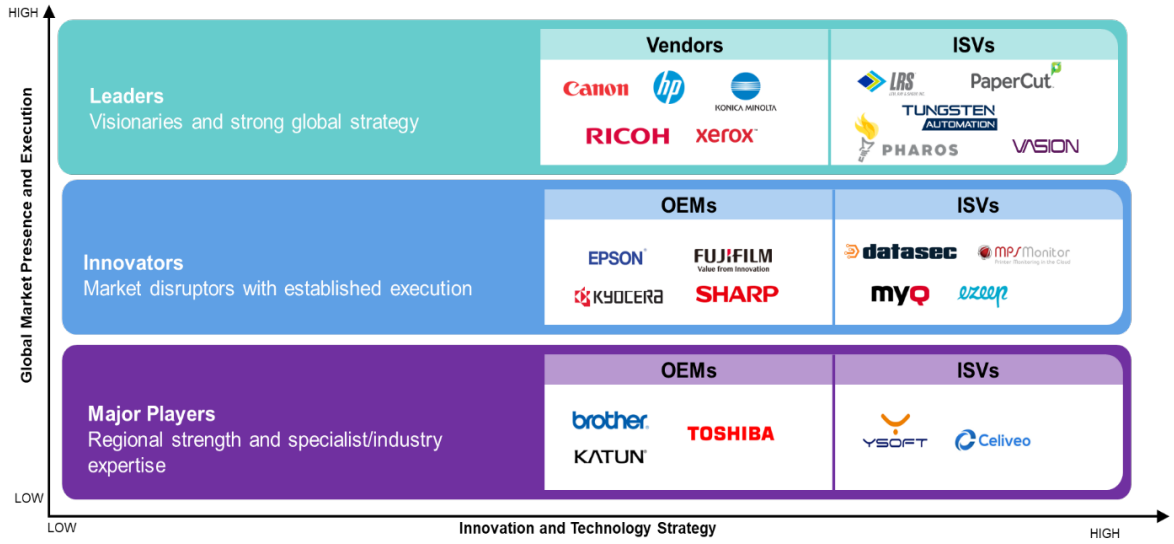

Figure 4. Quocirca ACT Leadership Landscape

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

Vendor profile: MPS Monitor

Quocirca opinion

MPS Monitor is positioned as an Innovator in Quocirca's 2026 Print Industry ACT Leadership report. With rising service costs, the expansion of hybrid work, and growing demand for secure, cloud-ready solutions, MPS Monitor believes that dealers can no longer depend on legacy platforms built for a different era. As such, the company's strategy and ambition for 2026 is to reshape the managed print services sector and redefine what a modern MPS platform must deliver.

A central principle guiding this direction is Monitor → Manage, which reflects MPS Monitor's commitment to helping dealers move beyond reactive device monitoring towards full operational management of print fleets. The company's focus is to empower dealers with tools, workflows, and insights that reduce service costs, detect issues earlier, automate routine tasks, and improve margins.

MPS Monitor positions its platform as a cloud-native business engine that enables the shift from manual, reactive service models to proactive, data-driven operations. Its R&D strategy blends long-term investment with continuous enhancement to deliver stability, scalability, flexibility, and differentiated cloud- and AI-driven capabilities for the evolving MPS channel. Continuous platform evolution is grounded in a dealer-first mindset, modern engineering, robust security, and applied data science.

MPS Monitor continues to enhance its multi-tenant SaaS platform. Investment is directed at solving real channel pain points, such as improving service margins, automating workflows, enhancing supplies forecasting accuracy, and enabling consultancy-led services.

Focus areas include expanding AI and analytics capabilities through the use of proprietary AI and machine learning models to convert device telemetry into predictive, actionable insights. These are supported by embedded business intelligence tools and an open API ecosystem that integrates seamlessly with dealer workflows. Embedded, self-service analytics and deep ecosystem integration position the platform as a single, unified intelligence layer for dealers. In addition, in 2026, the company will deploy a dedicated US-based technology stack to strengthen regional performance, data sovereignty, and long-term scalability.

Automation and AI

Supplies Intelligence engine

MPS Monitor's Supplies Intelligence engine uses fleet-wide telemetry to predict consumable end-of-life dates, realistic cartridge yields, and accurate toner coverage. It identifies gaps between actual and manufacturer-stated yields to flag potential contract profitability risks and enables automated replenishment policies based on days-to-empty, pages remaining, or residual toner levels. This helps reduce waste, prevent duplicate shipments, and optimise inventory.

The system also provides predictive consumption forecasting at device, fleet and customer levels, enabling proactive service models and just-in-time logistics. Its models continuously learn from individual device histories as well as aggregated data from identical make-and-model groups, improving forecasting accuracy at scale.

Open APIs and pre-built integrations

MPS Monitor automates the full counter-to-invoice cycle through real-time metre synchronisation with ERP and accounting systems, enabling straight-through billing, reducing manual errors, and accelerating cash flow. Open APIs and pre-built integrations ensure seamless connectivity with back-office platforms. Predictive consumable replenishment policies automatically trigger orders, alerts, or warehouse actions based on real-time device data, minimising stock levels, preventing duplicate shipments and avoiding service disruption.

Service automation

Service automation capabilities include automatic ticket creation from device alerts, intelligent routing to PSA and ITSM systems, escalation workflows, and templated diagnostics to reduce response times and technician workload. Secure remote device access enables proactive remediation without requiring onsite visits.

Through a comprehensive set of APIs and webhooks, device events integrate directly into CRM, ERP and collaboration tools, ensuring operational teams work within unified, automated processes, all securely managed within MPS Monitor's certified SaaS environment.

AI-powered chatbot
MPS Monitor has introduced an AI-powered chatbot trained on its user guides and security documentation. The assistant delivers instant support, troubleshooting guidance, and assistance with completing security questionnaires, improving dealer efficiency and responsiveness while operating within a secure, compliant framework.

Security
Security is tightly embedded across MPS Monitor's DevSecOps lifecycle and reinforced by independent testing and compliance with ISO/IEC 27001, SOC 2 Type 2, and CSA STAR Level 2. Strong authentication controls include single sign-on integration, MFA enforcement, role-based access policies, and tenant isolation within a multi-tenant SaaS architecture.

The security roadmap includes active planning for post-quantum cryptography transitions, ensuring long-term cryptographic resilience alongside current industry-standard best practices.

Analytics
MPS Monitor's fully integrated Power BI environment provides dashboards covering fleet health, consumables, SLA performance, contract profitability, and sustainability, while also enabling custom reporting without the need for external BI tools. By bringing together metre data, service events, consumables information, ERP and CRM signals, and customer insights, the platform removes data silos and enables dealers to manage operations from a single, clean, connected view.

Cloud and collaboration

Cloud-native architecture
MPS Monitor's cloud-based, multi-tenant SaaS architecture provides centralised monitoring, automatic updates, embedded analytics, and global scalability without requiring on-premise infrastructure. Built for high availability and horizontal scale, it supports millions of devices through resilient microservices, secure APIs, and rapid feature deployment.

Its lightweight, multi-platform DCAs use encrypted, standards-based communication, support clustering and local buffering, and maintain telemetry continuity. Edge processing optimises data before transmission, while secure remote access enables controlled remediation without exposing customer networks.

Sustainability
MPS Monitor's sustainability strategy combines software-driven carbon and paper reduction tools with embedded analytics. Through integration with PrintReleaf Exchange, monitored page volumes are automatically converted into certified reforestation actions, generating verifiable planting certificates to support ESG reporting across global projects.

Embedded analytics provide visibility into key sustainability metrics, including total pages, colour versus mono mix, pages per user, and usage trends, helping to identify waste. By combining device telemetry with job accounting data from print management solutions such as PaperCut, organisations can pinpoint high-consumption areas and implement targeted reduction initiatives.

Technology Ecosystems

MPS Monitor's innovation strategy is built around a broad technology ecosystem spanning OEMs, cloud platforms, analytics providers, ERP and PSA vendors, security partners, and sustainability specialists.

OEM collaboration is central to its ability to deliver differentiated capabilities. Deep integrations with HP, including Smart Device Services and cloud-based DCA technologies, enable advanced telemetry, remote diagnostics, firmware management, and proactive remediation. MPS Monitor operates as a fully vendor-

agnostic platform, supporting embedded agents and OEM APIs from manufacturers such as Canon, Ricoh, Sharp, Konica Minolta, Kyocera, Lexmark, Epson, and Zebra. This provides consistent fleet visibility while enabling enhanced capabilities where vendor interfaces are available.

MPS Monitor is also integrating datasets and complementary technologies from Valsoft's managed print division to enhance cross-platform intelligence and broaden the insights available to dealers.

Microsoft Azure and Power BI drive cloud and analytics innovation, supporting scalable data pipelines, AI and machine learning workloads, and an integrated self-service BI environment. MPS Monitor integrates with more than 100 ERP, CRM, and service management platforms to automate counter-to-invoice processes, replenishment, and SLA-based service workflows.

Open APIs and pre-built connectors ensure seamless integration across ERP, PSA, CRM, logistics, and OEM cloud systems. Support for all major brands and models, including HP large-format printers and Zebra label printers, enables heterogeneous fleets to be managed within a single platform.

Security and identity partnerships, including Okta and independent cybersecurity assessors, reinforce enterprise-grade authentication and continuous validation.

Recommendations

The trends in Automation and AI, along with cloud and transformation capabilities, are not optional innovations but the new table stakes for survival. To expand their capabilities and meet these new demands, the ecosystem must embrace collaboration. OEMs and ISVs must work together to drive innovation, moving beyond their traditional models. This collaborative approach allows each player to leverage its unique strengths, from hardware engineering to software expertise, to deliver the comprehensive solutions customers now require.

Vendors seeking to adopt the ACT model must:

- **Rethink the device beyond an endpoint.** The MFP has evolved to become an intelligent, interconnected hub. OEMs need to embed AI-enabled productivity, environmental, and security features directly into the hardware while also supporting advanced integration with third-party solutions and workflows.

- **Invest in, acquire, or partner with software expertise.** Building complex AI and automation software from scratch is a slow and costly process. OEMs can accelerate their capabilities by strategically acquiring specialised software companies or forming key partnerships with them. ISVs should seek to develop deeper OEM and adjacent software partnerships, demonstrating their expertise and ability to collaborate across the print value chain.

- **Develop and market advanced cloud offerings.** Meet customers where they are on their cloud journey while educating them on the value of transitioning to more flexible hybrid or cloud-native solutions.

- **Transform the channel.** The sales channel is critical to this transition. OEMs must equip their partners to sell strategic solutions, not just boxes, while ISVs must support partners in building deeper software sales capabilities. This requires comprehensive training on consultative selling, a deep understanding of customer business challenges, and a compensation model that rewards long-term recurring revenue over one-time hardware sales.

To thrive, the industry must fundamentally transform its go-to-market approach. This means aggressively forging partnerships with IT service providers, actively participating in cloud marketplaces, and enabling a new breed of channel partners that can sell a complete IT solution – not just a box or standalone software solution. This is the future for the industry, and it must act now to secure its place in a world where the power lies not in the device, but in the ecosystem to which it belongs. By embracing AI and automation, building on the cloud and collaboration, and strategically positioning themselves within a broader IT ecosystem, print vendors can secure their relevance and unlock new revenue streams in the future of work.

About Quocirca

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

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

Quocirca has pioneered research in many emerging market areas. More than 10 years ago we were the first to analyse the competitive global market landscape for managed print services (MPS), followed by the first global competitive review of the print security market. More recently Quocirca reinforced its leading and unique approach in the market, publishing the first study looking at the smart, connected future of print in the digital workplace.

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