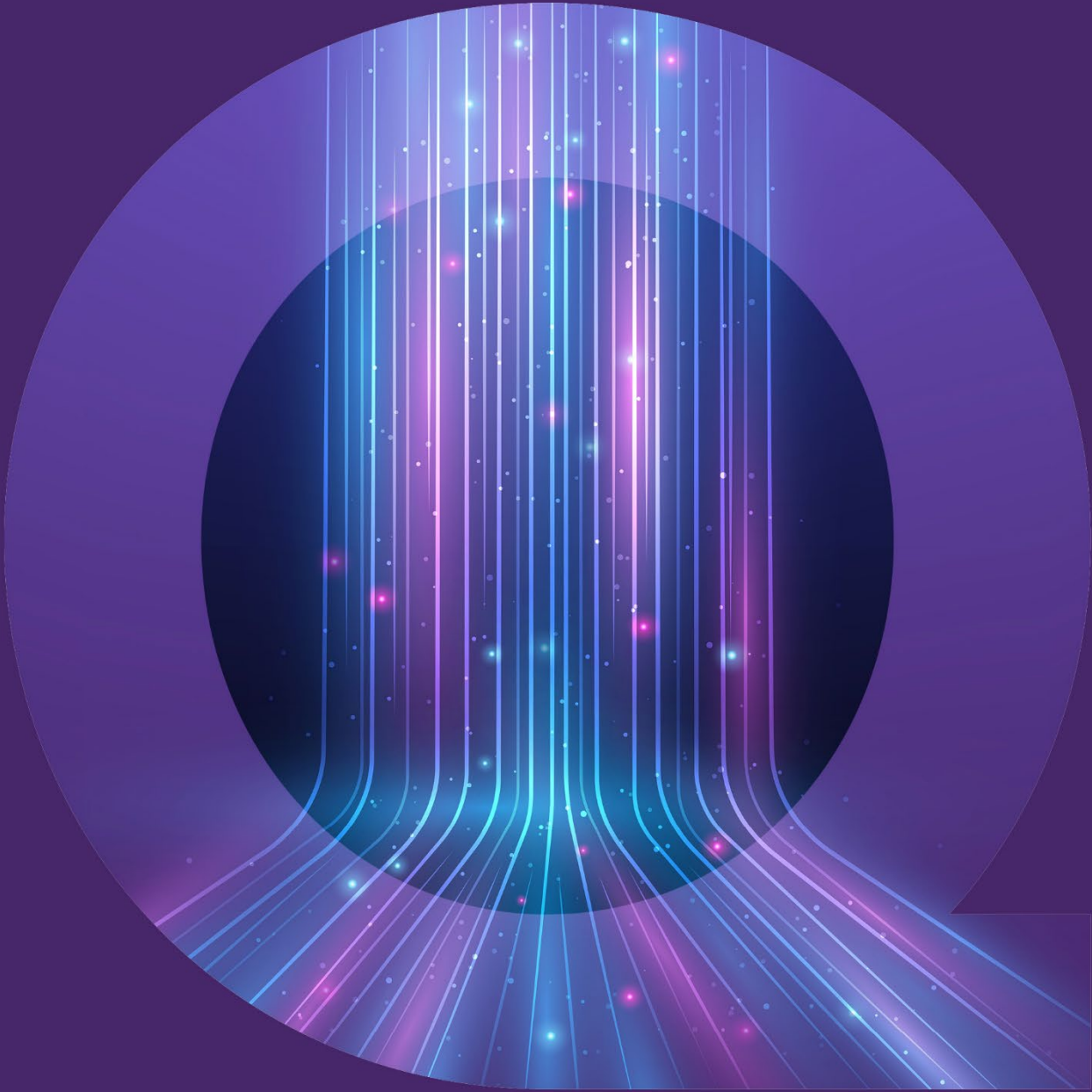


# ACT: Print Industry Ecosystem Leadership

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



## 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

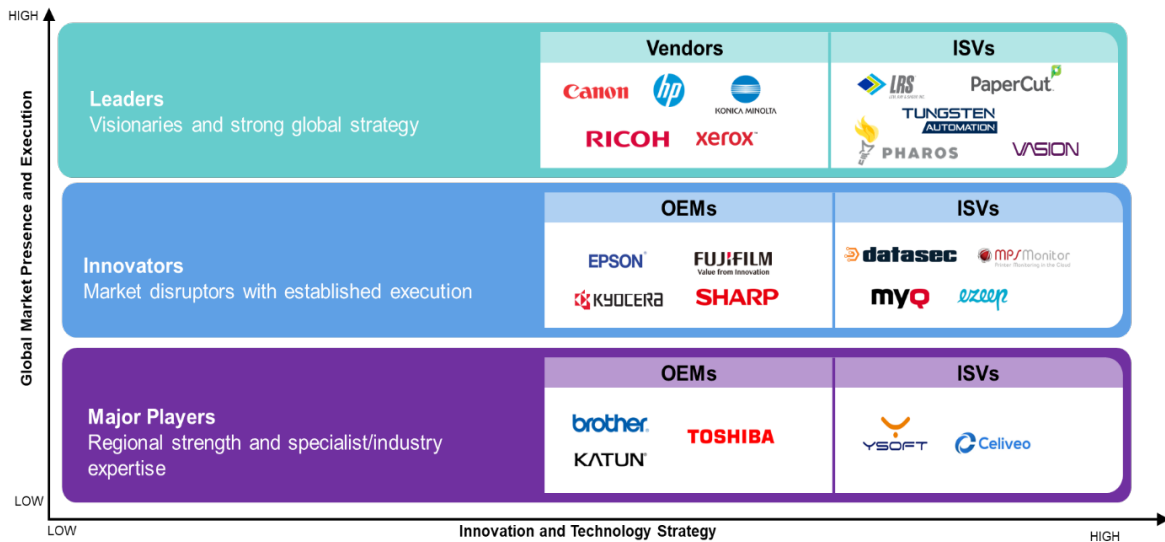
Quocirca's ACT leadership assessment evaluates vendors in these critical areas, defining their market position as **Leaders, Innovators, or Major Players**. The assessment is conducted in three key phases:

- **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: PaperCut

### Quocirca opinion

PaperCut is positioned as a Leader in Quocirca's 2026 Print Industry ACT Leadership report. PaperCut's 2026 strategic focus centres on accelerating digital transformation through cloud-native innovation, automation, and strengthened partner ecosystems. Its strategy is built around five key pillars – protecting and expanding its market leadership in education, scaling its footprint in healthcare, accelerating cloud maturity and independence, reshaping its go-to-market model for a SaaS-first future, and empowering consultative reselling through data.

PaperCut aims to capitalise on the growing demand for cloud-native solutions in the education sector by supporting the long-term success of PaperCut MF customers while enabling seamless migration to PaperCut Hive. By enhancing the technical capabilities of PaperCut Hive and Pocket, it is further decoupling print management from hardware refresh cycles, enabling faster deployment and new high-growth routes to market through MSPs and direct engagement.

As OEM consolidation continues, PaperCut is diversifying its distribution models and integrating complementary MSP-centric pathways to ensure resilience and shared value across all channels. It is also enabling resellers to shift from transactional sales to data-driven, consultative engagements, with deep usage insights.

PaperCut's R&D and innovation strategy reinforces these priorities through investment in distributed edge evolution, security, interoperability, and AI. It is advancing its distributed Edge Mesh architecture to deliver a deterministic, highly supportable print experience with improved diagnostics and reduced reliance on legacy servers. It is committed to eliminating print as a security exception, ensuring it integrates seamlessly into a modern identity stack, and is adopting modern authentication (SSO/MFA) to streamline user onboarding and strengthen the print environment. PaperCut also continues to champion interoperability across all brands and platforms; this includes leading the transition to modern print stacks via WPP and ARM64.

Additionally, the company is modularising PaperCut Hive for scalable consumption, leveraging AI internally to increase the velocity and quality of its software releases, and exploring AI-assisted support workflows and data-driven insights to empower partners to deliver proactive, consultative services.

### Automation and AI

PaperCut's AI strategy focuses on boosting operational velocity by applying predictive AI for lead qualification and content optimisation, as well as AI-driven translation to accelerate global go-to-market efforts. The user experience is enhanced through AI-powered proactive support, enhanced OCR, and document automation. AI is also used to provide partners with data-driven insights for new SaaS opportunities.

#### **Workflow automation**

PaperCut MF and Hive automate the bridge between physical documents and digital workflows by offering a one-click scanning experience on MFPS. PaperCut's automation engine supports customised workflows for routing, renaming, and processing. Enhancements such as OCR and blank page removal ensure high-quality digital documents and metadata flow seamlessly into customers' broader business process automation ecosystems.

#### **Security**

PaperCut's security strategy is built on zero trust principles, prioritising end-to-end encryption, regional data residency, and modern identity management. Cloud applications continuously reauthenticate devices, and data is encrypted in transit and at rest. PaperCut is advancing authentication methods including SAML-based federation and smartphone-based release, continues to mature its ISO 27001 status, and uses AI to enhance its security response capabilities.

#### **Analytics**

PaperCut turns print data into actionable business intelligence by collaborating with Authorised Partners and ISVs to deliver PaperCut MF integrations and Hive add-ons that feed directly into platforms such as Power BI,

Tableau, and Intuitive BI. Enhanced in-product reporting provides automated, scheduled insights that help administrators reduce waste and optimise fleet performance. The company's strategy centres on using these deep usage insights to help partners mitigate account risk, improve service delivery, and shift from transactional to consultative customer relationships.

## Cloud and collaboration

All PaperCut platforms are guided by a cloud-first transition strategy, with PaperCut Hive and Pocket delivered as cloud-native solutions built on a robust Google Cloud foundation. By leveraging its Google-based infrastructure and optimising for platform centricity, PaperCut increases R&D efficiency while ensuring its cloud datasets deliver unique value for customers managing complex, multi-vendor printer fleets across both Google and Microsoft ecosystems.

### Cloud print management

The PaperCut Edge Mesh processes print jobs locally while remaining cloud-orchestrated, delivering the resilience and performance needed for hybrid environments without onsite servers. Cloud pull delivery enables printers to securely retrieve jobs directly from the cloud, supporting segmented or client-isolated networks. This edge-centric model allows PaperCut to operate as a flexible, secure IoT layer aligned with modern deployment requirements and zero trust security principles.

### Sustainability

PaperCut software uses behavioural nudges, eco-dashboards, and enforced print policies to reduce paper and toner use. PaperCut Grows extends this impact through its Forest Positive programme, which enables organisations to plant more trees than they consume through printing.

### Cloud marketplace

PaperCut's access and identity management plugins for Google Workspace and Microsoft Entra ID are available through the Google Cloud Marketplace and Microsoft Entra App Gallery. These listings allow organisations to simplify identity integration and deployment with the PaperCut ecosystem.

## Technology Ecosystems

PaperCut has deep technical partnerships with all major print OEMs, ensuring seamless compatibility across multi-vendor fleets. To advance cloud and security transformation, the company has forged strategic global partnerships with Microsoft and Google, delivering modern authentication, zero trust alignment, and tight integration with cloud-native productivity suites. Its partnership with Intuitive BI extends its automation and analytics capabilities by turning print data into actionable visual insights.

Beyond formal alliances, PaperCut fosters a broader technology ecosystem through extensive third-party integrations that connect print management with wider IT workflows. Customer and partner advisory boards provide a continuous feedback loop, ensuring its roadmap and go-to-market programmes are aligned with emerging market needs.

## 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.

For more information, visit [www.quocirca.com](http://www.quocirca.com).

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