



# Managed Print Services Landscape, 2018

*A vendor analysis of the global enterprise MPS market*

**October 2018**

**HP Inc. Excerpt**

This report examines the competitive landscape for managed print services (MPS) and discusses the key market drivers and trends that will shape future MPS engagements. It also draws on new research conducted in June 2018. The survey covered organisations with over 500 employees using MPS in the UK, France, Germany and the US.

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**REPORT NOTE:**

This report has been written independently by Quocirca. During the preparation of this report, Quocirca has spoken to a number of suppliers involved in the areas covered. We are grateful for their time and insights.

Quocirca has obtained information from multiple sources in putting together this analysis. These sources include, but are not limited to, the vendors themselves. Although Quocirca has attempted wherever possible to validate the information received from each vendor, we cannot be held responsible for any errors in any information supplied.

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# Managed Print Services Landscape, 2018

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## Executive summary

Managed print services (MPS), along with related services and solutions, represent fundamental growth opportunities for print manufacturers and their partners. However, the market is mature, forcing MPS providers to differentiate themselves with new offerings. Today MPS has largely been repositioned in the broader realm of digital workflow transformation. While most providers offer a broad portfolio to help drive workplace productivity and efficiency, Quocirca's 2018 MPS survey reveals that some are falling short in the key areas needed to support this – analytic insight, workflow automation and innovation. MPS providers should deepen their competencies in these areas and expand their influence in the enterprise through participating in the broader managed security and internet of things (IoT) space. This will enable providers to become trusted partners for services beyond print.

## Strong MPS market leadership group

The enterprise MPS market is characterised by a closely packed group of leaders: Xerox, HP Inc., Ricoh, Canon, Lexmark and Konica Minolta. All demonstrate a mature service portfolio, commitment to enhanced service delivery and an ongoing investment in analytics. Xerox in particular excels in its workplace productivity strategy, supported by its innovative ConnectKey multifunction printer (MFP) platform. HP Inc. continues to deepen its footprint with an expanded hardware portfolio and one of the most advanced security service offerings. Ricoh has perhaps the broadest range of non-print-centric services, with its IT services capabilities, and it has gained stronger traction in Europe over the past year.

## MPS is recognised as an enabler for digital transformation

MPS is a key enabler for accelerating digital transformation, through digitisation and workflow automation, and organisations recognise the potential. While today just under a quarter (23%) agree that MPS plays a very important role in digital transformation, 54% expect it to do so in two years' time. While most vendors have expanded their digital workplace portfolios, some traditional MPS providers are struggling to deliver successfully, due to the sheer complexity of workflow automation.

## Security moves up the MPS agenda

With cybersecurity threats constantly increasing, there is growing concern about IoT devices being the target of attacks, pushing security higher up the MPS agenda. Quocirca's 2018 MPS Survey reveals that data losses remain widespread across companies of all sizes that use MPS. In 2018 65% report at least one data loss, an increase from 60% in 2017. Overall, just 30% of respondents report that they are completely confident that their print infrastructure is protected from all threats, both internal and external. Leading MPS providers are enabling businesses to close this print security gap through comprehensive security assessment services, although the level of depth varies by provider.

## Analytic insight is key to enhanced service delivery

Organisations are expecting deeper analytic insight from their MPS provider, with 41% indicating that this was a 'very important' requirement, compared to 31% in 2017. This puts it in second place after service level quality. In fact, both criteria are closely linked, as service performance can be enhanced through embedding analytics throughout MPS engagements, from the initial assessment process to continuous monitoring. However, providers must expand their capabilities beyond predictive analytics for service delivery. To make a real impact on workplace productivity MPS providers need to develop a true understanding of user behaviour to deliver cohesive digital workflow services that automate manual, paper-based processes.

## Future outlook

MPS providers cannot rest on their laurels in a market that demands stronger differentiated services beyond traditional MPS engagements. Quocirca recommends that providers develop broader collaboration and partnerships with IT service providers to participate in growth areas such as managed security and managed IoT. Developing services in these areas not only offers broader growth opportunities but unlocks the potential for traditional MPS providers to innovate their service portfolio. This will enable them to make their offerings more relevant to enterprises, which are increasingly looking for more expertise from their providers.



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# Methodology

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## End-user analysis

Quocirca conducted a survey among senior IT managers with responsibility for decisions relating to managed print services. The research was conducted in the UK, France, Germany and the US, amongst 240 enterprises with 500 or more employees that already use a managed print service. For the purposes of this research, organisations with 500 to 999 employees are referred to as midmarket organisations and those with over 1,000 employees as large organisations. The survey was conducted online and fielded during June 2018.

## Vendor analysis

The following vendors participated in the study: HP Inc., Konica Minolta, Lexmark, Ricoh and Xerox. Vendors were selected according to the following criteria:

- **Experience and skills in providing MPS services** – All providers had to demonstrate a strong record of delivering MPS.
- **Geographical delivery capability** – Each provider was required to have the capability to deliver global services.

Each MPS vendor was asked to complete a written submission detailing its strategy, capabilities and customer references to capture key facts and figures. These submissions were followed up with vendor interviews. The quantitative and qualitative inputs from the vendor research were analysed by Quocirca, to determine each vendor's score against a list of criteria related to market presence and completeness of offering. Each score is on a scale of 1 to 5, where 1 is weak and 5 is very strong. This evaluation of the MPS market is intended as a starting point only. Please note that Quocirca's scoring is based on an unweighted model, although prospective buyers may wish to weight the scores to meet their own specific needs.

# Definitions

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Quocirca defines a 'managed print service' as the use of an external provider to assess, optimise and continuously manage an organisation's document output environment and improve productivity and efficiency while reducing cost and risk. It also leverages existing investments in multifunction printers (MFPs), while continually monitoring usage, so that the optimised infrastructure continues to meet business needs.

MPS covers several service areas across three broad categories:

- **Assessment** – A review of the current print environment to provide recommendations for rationalisation and an estimate of potential future savings. Assessments range from basic online assessments to full workflow assessments. Environmental impact analysis and document security assessments may also be included.
- **Optimisation** – Device rationalisation and consolidation to improve user-to-device ratios, and development of print policies as part of a governance framework for a full enterprise MPS, deployment, transition and change management.
- **Management** – Continuous process improvement, business reviews, service level agreement (SLA) monitoring, remote management and workflow improvement.

These services fall under Quocirca's definition of MPS when the vendor takes over responsibility for delivery under a contract of three years or more in length.



# The MPS ecosystem

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The MPS landscape includes printer/copier manufacturers, systems integrators and software infrastructure vendors.

- **Printer/copier manufacturers** – These vendors’ programmes are generally tied to their product offerings, although multi-vendor support is often available. Service offerings include assessment, design, implementation and support services. They may also offer MPS programmes via their resellers. Vendors in this category include Canon, HP Inc., Kyocera, Konica Minolta, Lexmark, Ricoh, Sharp, Toshiba and Xerox.
- **Systems integrators/resellers** – These are a channel to market for some printer and copier vendors, and may offer MPS as part of a wider managed IT services offering.
- **Independent software vendors (ISVs)** – These provide software tools for use in the print environment. Examples Nuance, Print Audit, ECI FM Audit, PrintFleet, Ringdale, UniPrint and YSoft, which offer print management and secure printing products. MPS providers often use such third-party products to add value to a particular element of their MPS portfolio.



# Market overview

## A mature and evolving market

In a relatively mature enterprise market, MPS remains a key strategy for print manufacturers to expand service-centric revenue. Overall, 65% of organisations expect MPS budgets to increase over the next year, which is unchanged from 2017. The US leads in its MPS spending plans, with 78% of US respondents indicating a rise in spend over the next 12 months, compared to 50% of UK organisations (Figure 1).

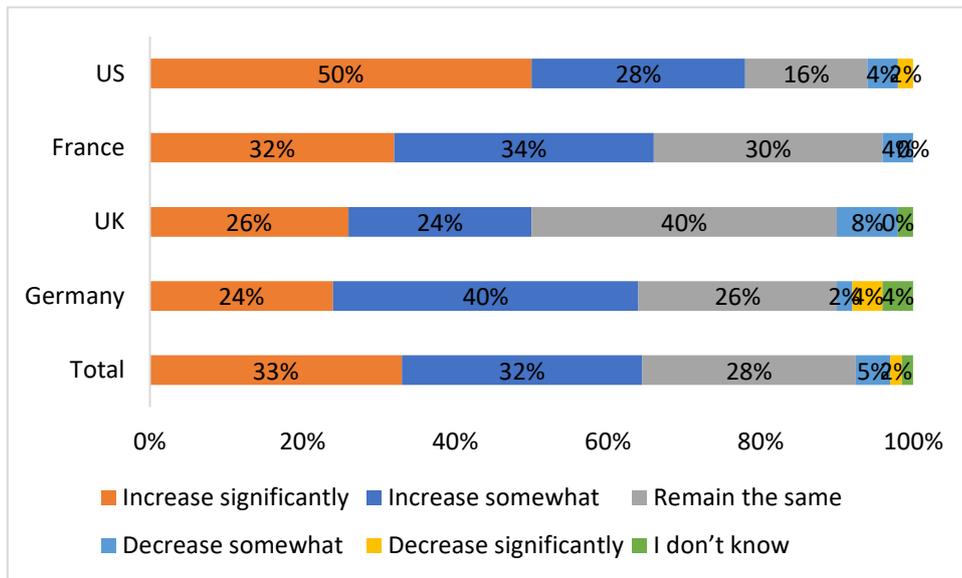


Figure 1. MPS budget plans over the next 12 months

Organisations remain dependent on paper to support their business processes, although this is diminishing – at a faster rate in some regions than others. Overall, 44% of organisations using MPS indicate that paper is ‘very important’ to their daily business (Figure 2). This is a drop from 48% in 2017. The US continues to be the most reliant on paper, with 72% saying it is ‘very important’ compared to 30% in France.

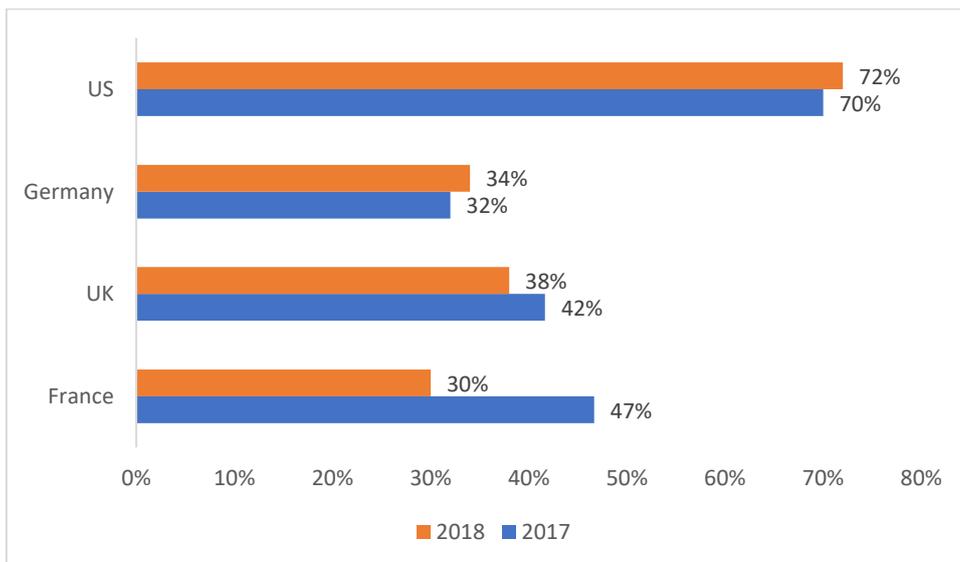
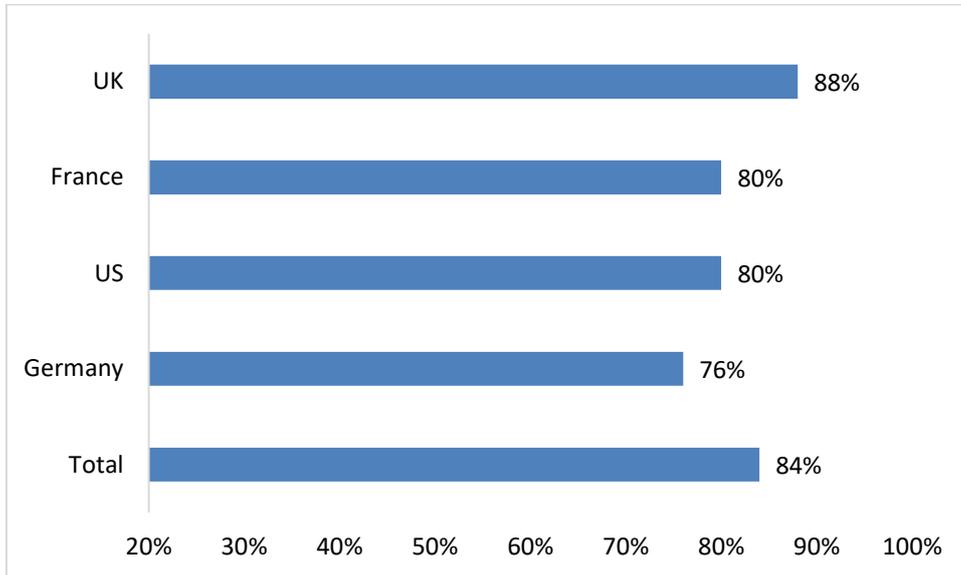


Figure 2. How important is paper to the daily business of your organisation? (‘Very important’ responses)



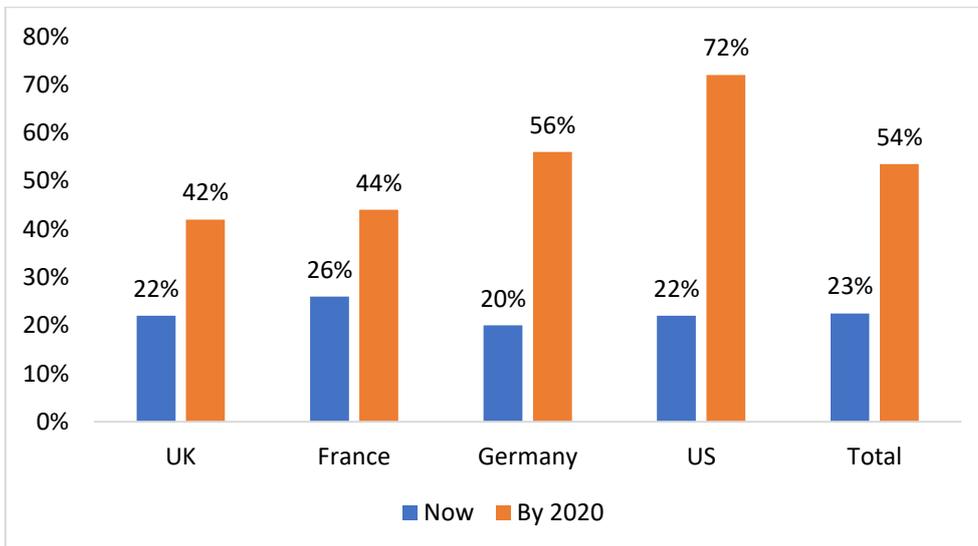
**Digitisation initiatives are underway**

Given the high level of paper usage among all organisations, digitisation is a key opportunity for MPS providers. Extending MPS contracts to encompass digital workflow services can help businesses drive further efficiency and productivity improvements. Overall, 84% organisations have implemented digital paperless processes. This rises to 88% among UK respondents and 83% in the retail sector.



**Figure 3. Organisations that have already implemented paperless processes**

MPS is a key enabler of digital transformation, through the implementation of digitisation and workflow automation. Organisations certainly recognise the potential. While today just under a quarter (23%) agree that MPS plays a ‘very important’ role in digital transformation, 54% expect it to do so in two years’ time (Figure 4). All industry sectors predict an increase, but this is highest in the public sector, where 8% see MPS as important to digital transformation now, while 53% anticipate that it will be by 2020.

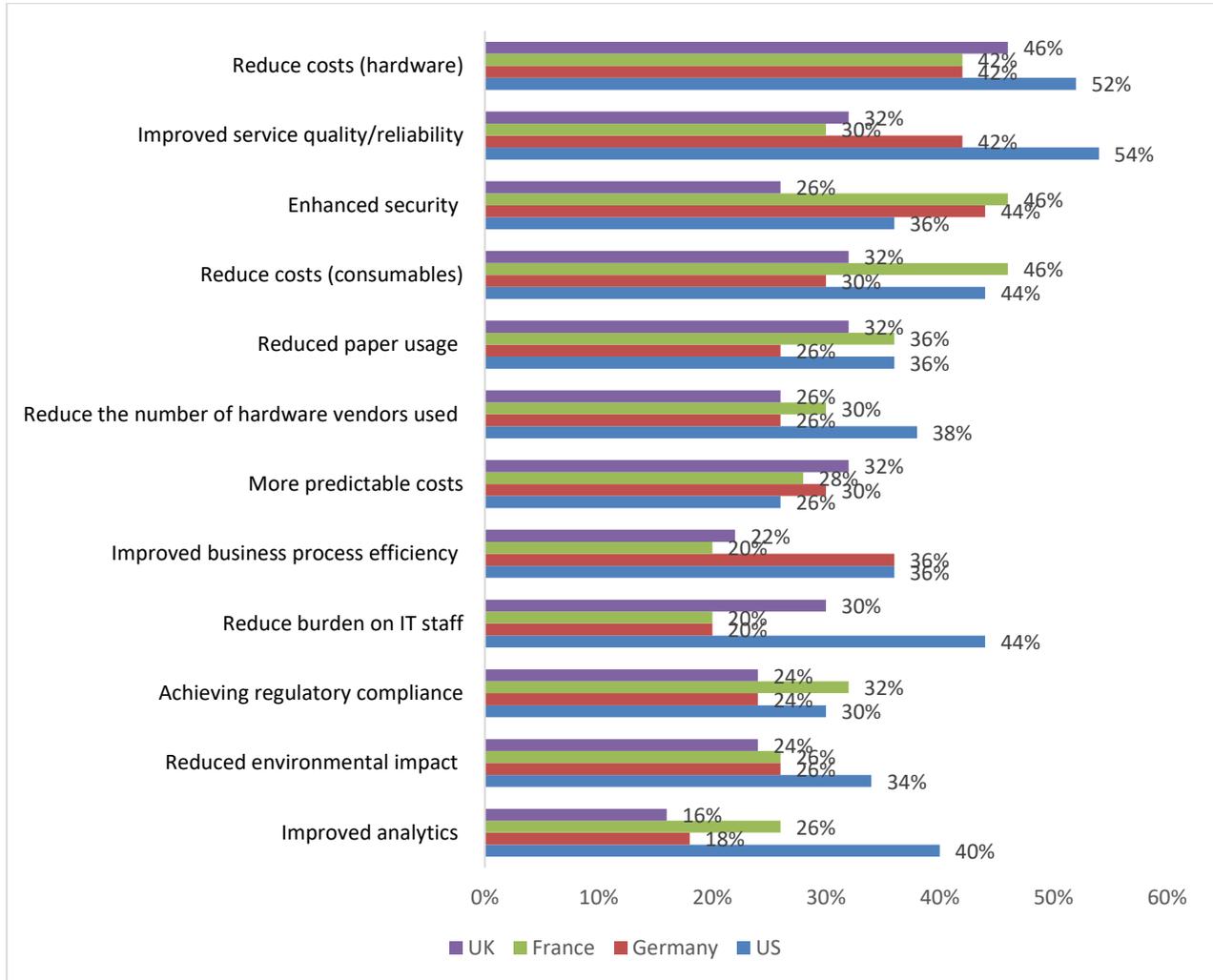


**Figure 4. The importance of MPS to digital transformation initiatives (‘Very important’ responses)**



**Cost, service quality and security remain top drivers for MPS**

While cost, service quality and security are the top reasons for MPS adoption, there are notable variations by country and organisation size. Service quality is the top MPS driver for 54% of US organisations. Meanwhile 30% of French organisations rate enhanced security and reduced costs as the top factors driving MPS adoption. Notably, 40% US organisations place importance on analytics, such as reporting on device usage or user behaviour – higher than in other countries (Figure 5).



**Figure 5. How important are the following business benefits to your organisation in relation to managed print services? (Average score on a scale of 1 to 5, where 1 = not important and 5 = very important)**

**Security assessment trends**

Ongoing concerns about the ever-growing number of cybersecurity threats are exacerbating worries around IoT devices being targeted in cyberattacks. Almost half (49%) of organisations agree that print security is important to their overall information security strategy, rising to 70% amongst US respondents. Yet overall, just 30% of respondents report that they are completely confident that their print infrastructure is protected from all threats – internal and external. Today’s advanced MFPs present a range of potential risks, if left unprotected. This includes data, document, device and network security vulnerabilities.

Quocirca’s 2018 MPS Survey reveals that data losses remain widespread across companies of all sizes that use MPS. In 2018, 65% reported at least one data loss, an increase from 60% in 2017. Notably this rises to 70% for midmarket organisations and drops to 60% for larger organisations. The growing threat is not so much from paper documents going missing in output trays, but the potential for MFPs to be used as a point of access to the network. The threat is real – overall 68% report at least one denial of service (DoS) or malware attack on a print device, reflecting the growing need to ensure that networked MFPs and printers are safeguarded from such attacks.



Given that print security is a broad and diverse area, delivering robust and comprehensive security assessment and monitoring services is becoming critical for MPS providers. Security assessments provide a good opportunity to uncover vulnerabilities, including any print security shortcomings. MPS providers are responding to the need by stepping up their security assessment service offerings.

The most effective security assessments evaluate the complete print environment, identify security gaps and offer ongoing monitoring. The more advanced services integrate with existing security incident event monitoring (SIEM) platforms to provide a holistic approach.

As the security landscape becomes increasingly more complex, it is likely that enterprises will turn to IT service providers to manage their security needs (Figure 6). Already, 31% of organisations indicate that they use a managed IT service provider that offers print security assessments, and this rises to 44% in the US. MPS providers should capitalise on the opportunity to collaborate and partner with such service providers to deliver these services, and potentially expand their reach.

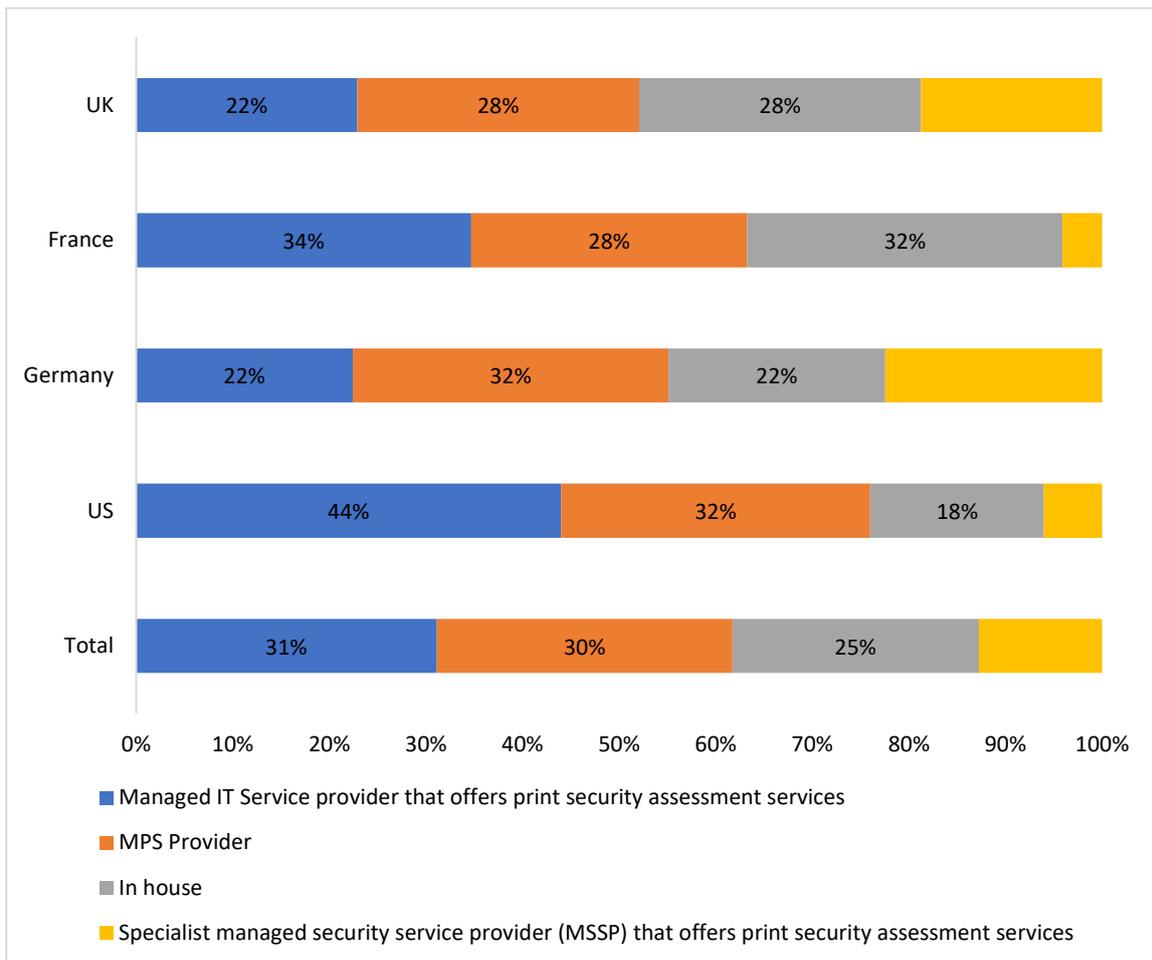


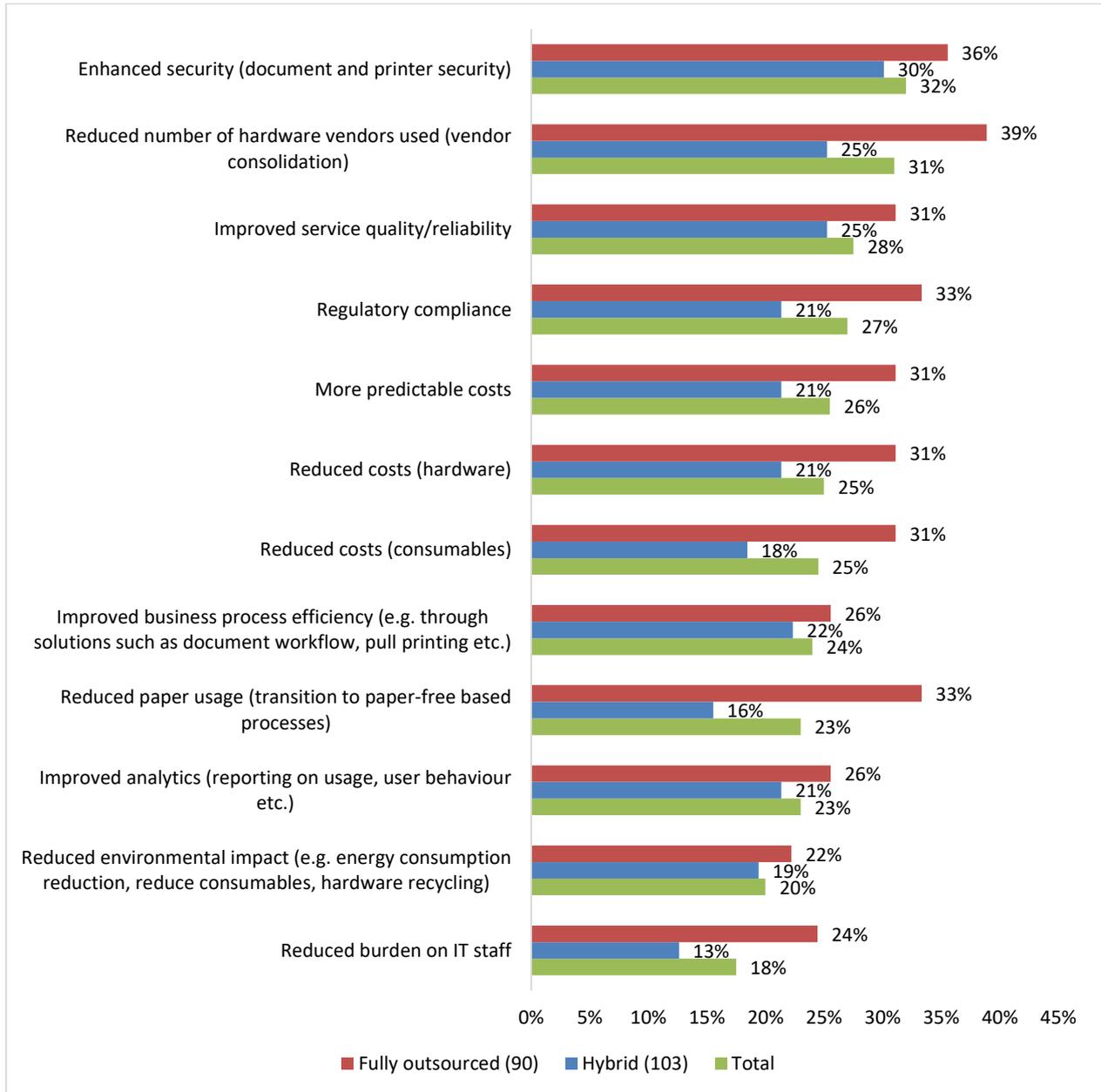
Figure 6. Print security assessment provider preference (among those using or planning a print security assessment)



**MPS performance**

Notably those that are using a fully outsourced MPS, rather than a hybrid approach (where some print management tasks are managed internally), are more likely to be achieving their goals. Nevertheless, MPS appears to be falling short of expectations in several areas. For instance, just 25% of organisations indicate that they have fully achieved their cost saving goals, and only 28% indicate that their service delivery goals have been met (Figure 7).

This could be due to a range of reasons, including expectations not being set correctly at the outset and the MPS contract failing to adapt as business needs change. Both these risks can be mitigated through more comprehensive assessments, implementation of effective print policies and ongoing or proactive strategic business reviews.



**Figure 7. Achievement of MPS goals ('Fully achieved' responses)**



Overall, MPS satisfaction levels have dropped from 2017, with a third (33%) of organisations reporting that they are 'very satisfied' with their MPS provider in 2018, compared to 43% in 2017 (Figure 8).

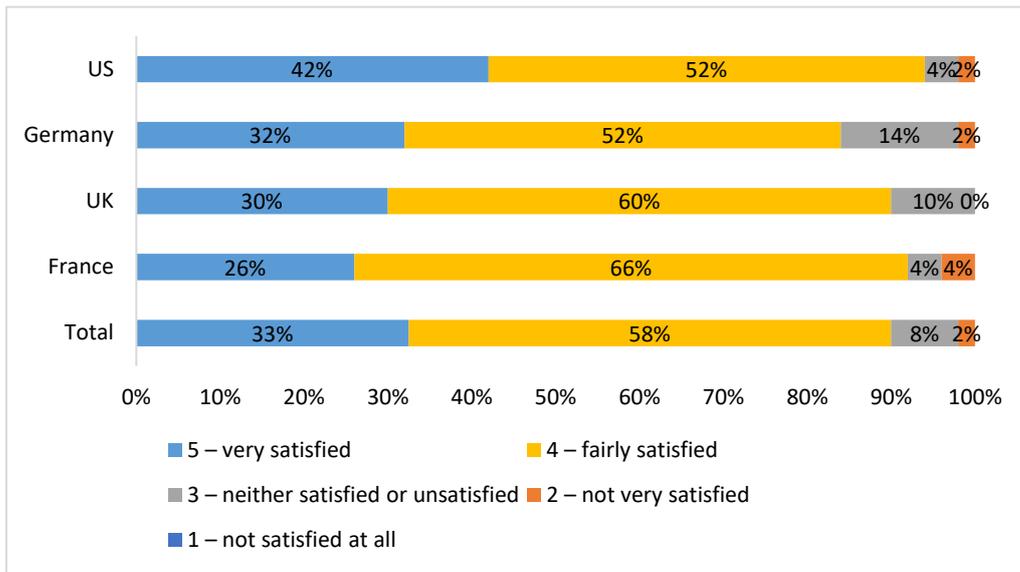


Figure 8. MPS satisfaction rates

While service quality remains the top supplier selection requirement, analytic insight has moved higher up the ranks, from 31% of respondents to 41% in 2018 (Figure 9). As organisations move to the second or third phase of their MPS engagement, it becomes more important that strategic business reviews deliver proactive, actionable insight to improve efficiency and performance. That means analytics that go beyond device usage and encompass a true understanding of user behaviour, driving efficiency and workplace productivity improvements and facilitating the next level of business transformation.

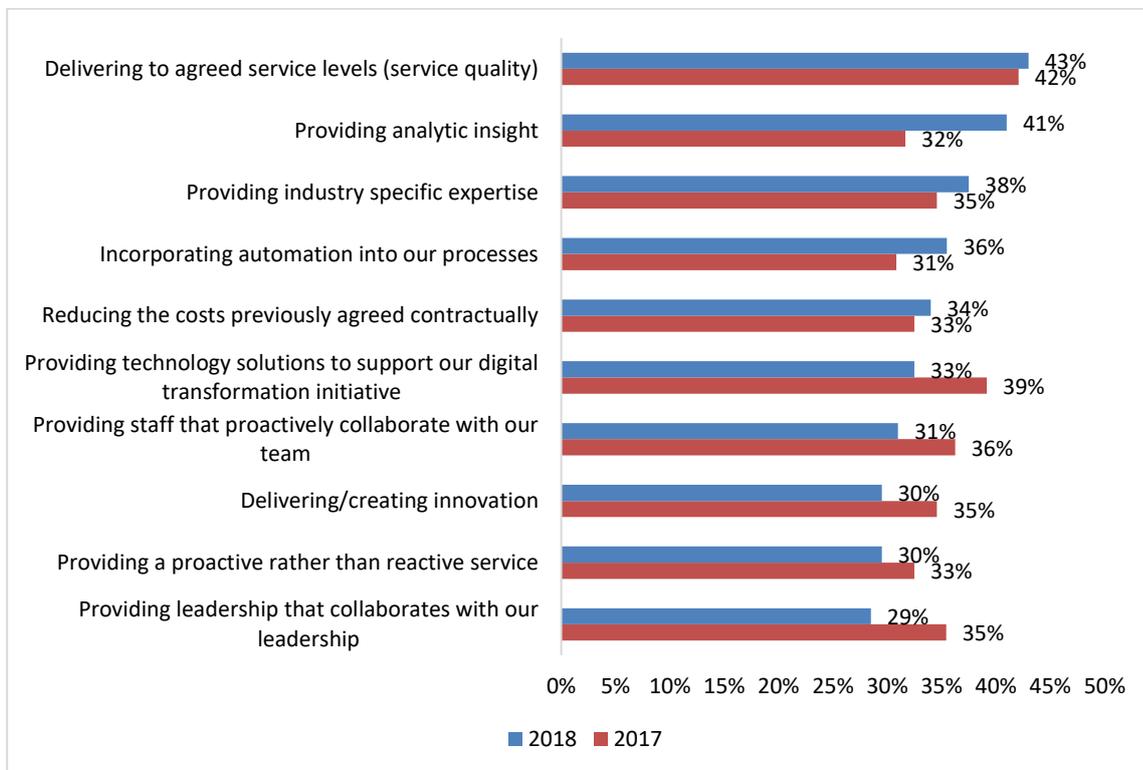


Figure 9. Importance of MPS provider selection criteria ('Very important' responses)



However, there are significant variations by region in how MPS providers are performing, with the US most positive across most criteria and Germany most conservative in their ratings (Figure 10). UK organisations display low satisfaction rates around MPS providers providing technology solutions to support digital transformation and industry expertise, compared to other regions.

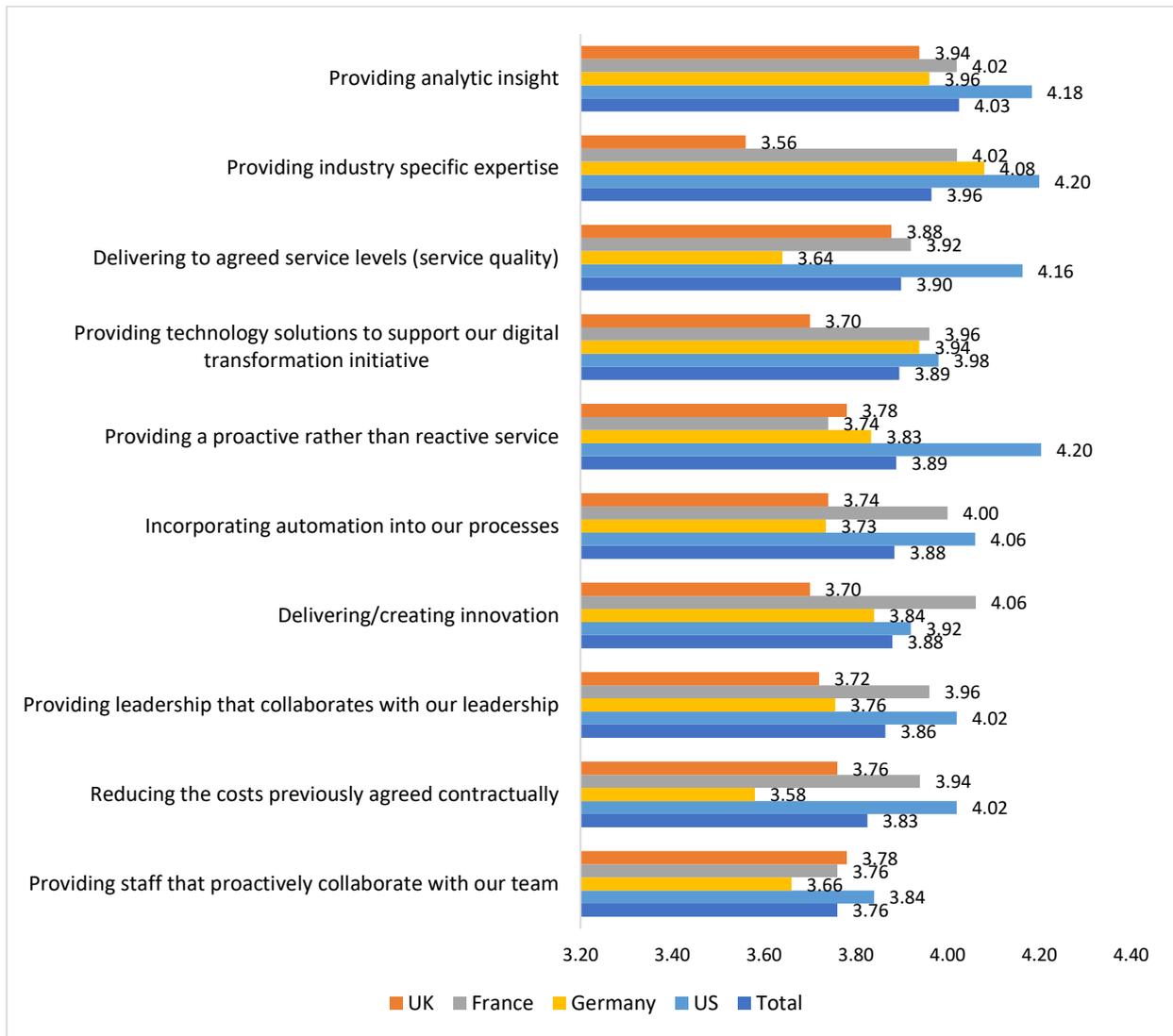


Figure 10. How effective is your current primary MPS provider at delivering the following business benefits? (Average score where 1 = completely ineffective and 5 = completely effective)



# Future opportunities for MPS providers

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As the core services of MPS continue to mature, traditional MPS providers must improve their offerings and deepen their competencies in areas such as IoT, security and analytics. While most of the market leaders offer a diverse set of services, the future of MPS lies in manufacturers and their partners fostering deeper partnerships across the broader IT landscape.

Quocirca recommends that providers evaluate the following opportunities:

## **Extend to a managed IoT service model**

MPS providers should capitalise on their expertise in managing the most established IoT devices on the network – printers and MFPs.

MPS provides a foundation for ensuring the performance, reliability, security and continuity of the print infrastructure. Today's advanced MFPs enable automatic firmware upgrades, device monitoring and diagnostics, predictive maintenance and device authentication.

Today, the emergence of IoT platforms designed to manage a wide range of connected devices, offering centralised security, fault detection and remote monitoring, presents a broader opportunity for MPS providers. By integrating management of non-print IoT devices into their service portfolio, traditional MPS providers stand to increase their influence, becoming involved in a broader IT services engagement, as well as tapping into new revenue opportunities.

Traditional MPS providers should work with platform vendors or managed IoT service providers to integrate MPS technology. This could potentially extend to managing other IoT workplace assets such as lighting, heating and vending machines.

HP has already made some steps in this direction, with its Device-as-a-Service offering, covering PCs and laptops. Whether it extends to cover more IoT devices or whether other print manufacturers will follow suit remains to be seen.

Although managed IoT services can offer broader opportunities, providers also need to consider the security challenges it can bring. While most MPS providers offer robust security solutions to protect print devices from external hacking and prevent exposure of confidential information, managing other connected devices will demand new competencies. Collaborating and partnering with third-party providers to gain expertise in IoT device management and security is therefore the best way forward for MPS providers looking to extend their capabilities in the IoT space.

## **Develop managed security services offerings**

Security has come to the forefront of the MPS agenda, and many providers are already expanding and deepening their capabilities around print security assessment and monitoring services. Quocirca's Print 2025<sup>1</sup> study revealed that enterprises are looking more to IT services providers to deliver MPS capabilities, which represents both a threat and an opportunity for MPS providers. While IT service providers are likely to outsource the MPS engagements to traditional print suppliers, MPS providers should evaluate the opportunity to work more closely with such providers and develop joint offerings.

Adding managed security to their service portfolios enables MPS providers to extend their core services. However, their print security offerings need to evolve beyond device monitoring to encompass incident detection and response. To participate in this broader managed security services market, MPS providers should partner with security technology providers who have the tools and specialist skills to provide strategic services around an integrated print and IT security offering.

Some print security offerings already integrate with security information and event management (SIEM) tools, and MPS providers should consider adding services and integration around these capabilities. As the market gravitates to a security-as-a-service model, MPS providers should also consider adding cloud-based security services to their portfolio. This will particularly appeal to small to medium-sized businesses (SMBs) that lack the budget and expertise to manage device security internally.

## **Unlocking the value of IoT analytics**

MPS providers already use analytics as part of their assessment services, ranging from basic assessments of device usage to more sophisticated analysis of user behaviour. Although much of this data is used effectively to improve the efficiency of a print infrastructure – providing predictive maintenance and asset tracking, reducing unplanned downtime, minimising risk and lowering costs – MPS providers have yet to exploit the true potential of analytics.



MFPs generate a wealth of data, including device, document and user information. Manufacturers can use data about product usage to gain customer insights, which they may then use to market and deliver new services. Beyond this, predictive analytics can be used to personalise customer experiences, predict demand and dynamically set and optimise prices.

However, print management analytics tools are often not designed for massive data analysis, and MPS providers may lack the necessary business intelligence analysis skills. Exploiting big data and analytics requires new expertise and competencies from manufacturers. This will need to be built through a big data talent acquisition strategy, driven either organically or through collaborative partnerships.

#### References

<sup>1</sup> Quocirca's Print 2025 global market insight study, 2018 – [www.print2025.com](http://www.print2025.com)



# Buyer recommendations

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Having evolved beyond device-centric contracts focused on fleet optimisation, the most effective MPS contracts leverage data analytics and industry expertise to drive better business performance.

As the market continues to mature, organisations need to look for providers that can meet higher expectations around improved service delivery and longer-term business efficiency. MPS providers need to make the transition from high quality service delivery to innovative and proactive partnerships with their customers. As MPS enters the realms of business transformation, contracts will become increasingly complex and involve a wider range of stakeholders.

When shortlisting and selecting MPS providers, buyers should seek vendors that possess the ability to:

- **Help them improve business performance** – In addition to helping customers improve the efficiency and security of their print infrastructure, an MPS provider can help them drive business transformation and increase employee productivity. MPS is not just about reducing costs and mitigating risks – the right MPS partners will also have a vested interest in supporting a customer’s revenue growth. Today’s MPS proposition should be designed around specific business outcomes, whether these are increased revenue, enhanced customer service or faster innovation. As such, an MPS provider should understand the customer’s business and be able to advise them on solutions they can implement to improve performance.
- **Offer a broad portfolio of managed services** – Organisations that use multiple providers for their print and IT services often find that managing them can be costly and complex. For maximum efficiency, organisations should look for a provider that has a comprehensive suite of services covering office and production printing, IT services and business process automation. As businesses look more to ‘as-a-service’ options for software implementation, MPS providers with strong expertise across both on-premise and cloud delivery models will be better placed in the market.
- **Provide consistent global service delivery with local support** – Global delivery capabilities offer many advantages, including rapid implementation in new locations and the ability to effectively manage engagements across multiple countries. However, it’s also important that a provider has local resources, with knowledge of the relevant regulatory and legal requirements. MPS providers must use standard delivery processes across all locations, and also standardise how multi-location teams are organised and collaborate.
- **Make proactive continuous improvements** – An MPS provider must go beyond a break/fix model to offer proactive and pre-emptive support and maintenance. As well as simple device monitoring, they should offer advanced analytics that can drive proactive support and provide visibility into areas for ongoing improvement. Analytics is now a critical technology differentiator for improving the outcome of an MPS engagement. Not only does it improve operational performance on an ongoing basis, but it can also support long-term strategies for business efficiency improvement, through helping clients understand existing document and business processes. Organisations should demand increasingly strong analytical capabilities from their MPS provider, supported by strategic business reviews to ensure that the MPS contract continues to meet their expectations.
- **Guarantee strong multi-vendor support** – Most print infrastructures are heterogeneous environments, comprising hardware and software from a variety of vendors, so MPS providers should have proven experience of working in multi-vendor environments. A true vendor-agnostic MPS provider should play the role of trusted technology advisor, helping an organisation select the technologies that best support its business needs. Independent MPS providers should also have partnerships with a range of leading vendors, giving them visibility of product roadmaps and emerging technologies.
- **Be flexible** – Businesses will always want to engage with MPS in a variety of different ways. Some may want to standardise on a single vendor’s equipment and software, while others may prefer multi-vendor environments. Some may want a provider to take full control of their print infrastructure while others may only want to hand over certain elements. And some may want to mix new technology with existing systems so they can continue to leverage past investments. Organisations should look for an MPS provider that offers flexible services able to accommodate their specific requirements. Flexible procurement and financial options are also key, with pricing models designed to allow for changing needs.
- **Be accountable** – Organisations need greater accountability from their MPS providers, to help them meet the increasing demands of shareholders, regulators and other stakeholders. A key differentiator for leading MPS providers is the ability to ensure strong governance of MPS contracts and act as a trusted, accountable advisor, making recommendations on the organisation’s technology roadmap. MPS providers must be willing to meet



performance guarantees through contractual SLAs, with financial penalties for underperformance. They should also understand the controls needed to meet increasingly complex regulatory requirements.

- **Provide full service transparency** – Consistent service delivery is built on consistent processes that employ a repeatable methodology. Buyers will be looking for access to secure, web-based service portals with dashboards that provide real-time service visibility and flexible reporting capabilities.
- **Align with standards** – An MPS provider should employ industry best practices, in particular aligning with the ITIL approach to IT service management. ITIL best practices encompass problem, incident, event, change, configuration, inventory, capacity and performance management as well as reporting.
- **Innovate** – MPS providers must demonstrate innovation. This may include implementing emerging technologies and new best practices as well as continually working to improve service delivery and reduce costs. Businesses should choose a partner with a proven track record of innovation, and either dedicated research centres or partnerships with leading technology players and research institutions. They should also consider how a prospective MPS provider can contribute to their own innovation and business transformation strategy. Innovation within any outsourcing contract may come at a premium, however – this is where gain-sharing models may be used.



# Vendor assessment

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

## Market presence criteria

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

## Completeness of offering

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

Figure 13 represents Quocirca's view of the competitive landscape for printer and copier vendors that deliver enterprise MPS. A vendor's market position is indicated by the size of the bubble, based on customer base estimates.

- **Market leaders** – Vendors that lead the market in both strategic vision and depth of service offering. Leaders have made significant investments in their service portfolio and infrastructure and are supported by strong delivery capabilities.
- **Strong performers** – Vendors that have established and proven offerings supported by demonstrable customer success.



- **Contenders** – Vendors with service offerings that are currently being aligned on a global or European basis. Contenders are typically investing in resources, infrastructure and partnerships to expand their market coverage.
- **Emerging** – Vendors that are in the process of developing MPS offerings, or which offer MPS on a regional basis.

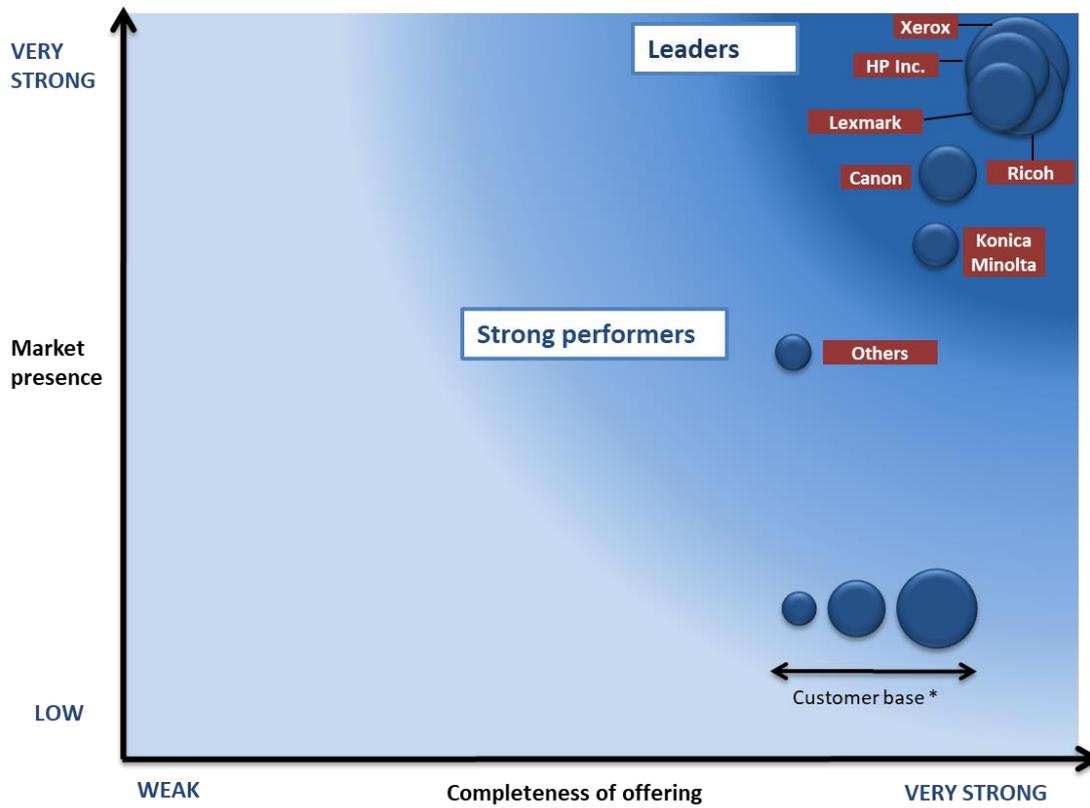


Figure 13: Quocirca MPS vendor positioning

\* Customer base: Note that enterprise customer figures and estimated devices under management have been considered when determining customer base bubble size. Please refer to vendor profiles and scorecards for detailed information.



# HP Inc.

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## Quocirca opinion

HP Inc. remains a leader in the MPS market, boosting its position through continued enhancements to its MPS portfolio and investment in its global MPS infrastructure and channels. HP reports over 6,600 MPS clients globally with over 1 million devices under management through its direct MPS offering. As a company, HP is continuing its journey of transformation and reinvention across both its Personal Systems and Print groups. For Q2 2018 (three months ending 30 April), sales reached \$14 billion, up 13% on the previous year. For the first time since 2010, sales increased for both the printing (2%) and PC (10%) segments. It also reported the 20th consecutive quarter of MPS growth.

HP is strongly committed to leading innovation in the print market, focusing on next generation areas such as mobile-optimised printing and voice-enabled printing, along with a leading position in print security. It is making strong progress in the integration of S-Print (the Samsung business). The channel is a key competitive advantage to HP and its strategy to gain 20% of the A3 market by 2020 is fully underway, supported by the continued expansion of its partner network. Most recently, HP is advancing on its contractual sales strategy through the acquisition of Apogee, a European services firm.

Today HP is the only MPS provider that can leverage its own IT and network technology to deliver a complete 'everything-as-a-service (XaaS)' model across printing and PCs. HP's strong IT credentials will serve it well as businesses increase their expectations of MPS providers to deliver robust IT expertise. As MPS evolves, the company is well positioned to address the varying needs of business of all sizes that are looking to improve the efficiency of their print infrastructure and accelerate their digitisation initiatives. HP's broad hardware, software and services portfolio is backed by extensive investment in its sales and technical resources.

## A mature and broad MPS portfolio

HP continues to build on its MPS proposition for organisations of all sizes, a mature and proven approach based on three elements: optimise and secure, manage the ecosystem and enable digital transformation. Its unified global service platform is supported by global delivery that serves both its direct and indirect channels.

HP's broad range of configurable services ranges from assessments, procurement, implementation, ongoing management and support, through to document and workflow services, including management of change and sustainability initiatives. HP continues to invest in its sales and delivery channels, which will continue as it deepens its combined service offering of MPS and device-as-a-service.

A fundamental element of HP's direct MPS engagements is its strategic business reviews, which evaluate SLA performance. Strategic business reviews are tailored to a client's KPIs, and leverage analytics to drive improved performance and increased customer satisfaction. HP particularly stands out in offering an innovation roadmap as part of continuous improvement for its large account clients.

## Industry leading security services

Security is at the heart of HP's MPS strategy, which is supported by its major advertising campaign entitled *The Wolf*. In addition to standard security features, HP devices include advanced embedded functionality such as HP Sure Start (BIOS-level security), whitelisting and run-time intrusion detection. HP was also first to enable a print security bug bounty program.

HP Secure MPS is a comprehensive offering that provides advanced print security services, delivered by credentialed print security advisors. Services include a print security implementation service, an advisory retainer service, governance and compliance and enhanced reporting and reviews. HP continues to expand its HP security consultant resources and also its range of security-related professional service offerings.

## Extensive solutions portfolio

Solutions are a major strength for HP, through its expanding JetAdvantage portfolio. Its JetAdvantage partner programme now has 125+ developers with over 300+ solutions, including document capture, security, mobility, job accounting, forms automation and production printing. The JetAdvantage solutions portfolio combines best-of-breed technologies (HP and partner developed) to support and optimise business processes. HP continues to deepen its industry focus, through market development, industry segment marketing and sales enablement capabilities.

It has a range of solutions targeted at industries such as financial services and insurance, healthcare, manufacturing and distribution, communications/media/entertainment and public sector, and a broad set of vertical solutions. And, through the



HP JetAdvantage Link cloud platform and marketplace, customised (and personalised) workflows can be more easily developed and accessed.

### Broad hardware portfolio

HP has the broadest portfolio of MPS-oriented MFPs and SFPs in the industry. With the acquisition of Samsung's printer business in 2017, HP has a wider range of both A4 and A3 colour and mono laser devices. It also has a range of A4 and A3 colour PageWide devices, which offer the most affordable way for customers to print in colour.

HP's unique PageWide architecture, features no-contact printing, for fewer wear parts, and the longest life consumables of any product in its class. Combined with the additional cost savings of HP PageWide's General Office mode, customers can experience more colour for less money than laser technologies. And all of HP's MPS-designed products offer the award-winning security capabilities to protect customers' data. HP ScanJets enable high speed, quality digitisation, and the graphics business has a wide range of specialty printing options, including HP JetFusion 3D printers.

### Summary

HP continues to build momentum in its MPS strategy. Its broad portfolio is differentiated in particular by its enhanced security assessments, analytics-led strategic reviews and workflow solutions, to support a client's digital transformation journey. Its overarching 'as-a-service' strategy is enabling it to extend its service and software portfolio to SMB and mid-market customers, which will also value HP's credentials for managing both print and PC environments. Quocirca's MPS IT decision maker research continually positions HP as a market leader. This is testament to its strong brand reputation with IT stakeholders and its continued commitment to driving innovation in the industry.

### Strengths and opportunities

#### Strengths

- **Global reach.** HP has a broad global reach – both directly and through a vast global partner network. With 50% of its direct MPS customer base being multinational or global, HP has developed a robust and mature global MPS platform and infrastructure to support and service global customers. Continued investment in its services delivery platform will enhance its global invoicing, reporting and service capabilities, which will be key to expanding its global MPS footprint.
- **Mature and established MPS technology foundation.** HP's mature MPS platform, a broad hardware portfolio and enterprise-scale technology across the IT infrastructure make it a reliable choice for businesses of all sizes. With its expanded channel-led service and solutions offerings, HP now has a comprehensive set of services to support its channel partners in transitioning their customer base to MPS contracts in the SMB and mid-market space.
- **Extensive security services and solutions portfolio.** HP has established an industry leading position in print security, having built a compelling range of services and solutions. Through its Secure MPS offering it provides an advisory service, advisory retainer service, governance and compliance, enhanced reporting and reviews and expanded remote management tools and services. This is all backed by a technology portfolio offering some of the more advanced security features in the market.
- **In-depth continuous reporting.** HP's strategic business reviews include building an innovation roadmap for MPS clients. The Strategic Business Reviews constitute an ideal framework for analysing workflow needs and proposing tailored solutions. As part of the Strategic Business Reviews, HP offers advanced predictive analytics and print-policy optimisation to identify areas of focus for cloud/fleet management, mobility, security and workflow/digitisation, help model the financial impact of improvements, and set a roadmap for implementation and innovation.

#### Opportunities

- **Strategic systems integrator partnerships.** HP is increasing its focus on expanding its systems integrator focus. This will be of significant value as market expectations for MPS through an IT-centric provider increases. HP can also leverage its single delivery platform to provide managed services for both the print and PC environments. As its PC 'device-as-a-service' model gains traction, this integrated offering approach will appeal to organisations looking for a single supplier to manage both environments.
- **Customised workflow apps.** While HP has a broad range of solutions, it should further expand its range of customised MFP workflow apps. This provides a simplified approach to digitisation for specific workflows directly from the MFP, and can help organisations better leverage MFP investments to support digital transformation.



## MPS Strategy

HP's strategy is centred on three key stages where a customer can engage with HP from the start in any of these three stages.

- **Optimise and secure.** Based on a full assessment of the existing printing infrastructure and workflows, this stage focuses on rationalising the printer fleet, standardising on fewer models and increasing network and fleet security for an increasingly mobile workforce. Gaining visibility of print usage and costs helps reduce IT's burden and allows it to focus on other priorities.
- **Manage the ecosystem.** Ongoing, proactive management of the existing infrastructure helps to maintain efficiencies, security and improve user productivity, while making best use of existing assets.
- **Enable digital transformation.** This phase focuses on digitising and streamlining paper intensive business processes. HP identifies digital processes that would generate the greatest return on investment. Solutions range from packaged offerings to highly custom implementations for specific industries (financial services and insurance, public sector (government/education), manufacturing and distribution, communications/media/entertainment, health care and legal).

HP continues to leverage its partnerships with top systems integrators to deliver business process outsourcing (BPO) and information technology outsourcing (ITO) capabilities and to broaden its sales coverage at the enterprise level. It is also actively ramping up its Partner Managed Print Services offering to capture the SMB and Enterprise opportunity for MPS through its broad channel partner ecosystem.

## MPS infrastructure

HP has a strong and mature MPS platform, which it continues to enhance. This supports the following key service capabilities:

- **Global delivery.** HP MPS' technology platform integrates devices, solutions, monitoring and management tools with HP's enterprise services infrastructure. The platform transforms data into information, enabling HP Managed Print Services (MPS) global delivery teams to optimise imaging and printing environments, remotely manage and maintain fleets and solutions, and proactively deliver and support customer needs. HP MPS technology platform, coupled with global standard delivery processes and resources, simplifies fleet management activities for enterprise managed print services environments, improving the total customer experience. HP is currently building a single global services delivery platform for its print and personal systems offering.
- **Service portal and Device Control Center.** HP provides a singular global integrated services portal and dashboard that provides live, instant views of overall fleet status and detailed device information. The HP Service Portal is a secure website that enables customers to view their MPS contract, usage reports, and printer fleet details online. Customers can order supplies, preventative maintenance kits, and initiate next-business-day onsite hardware support. HP's Device Control Center provides HP and customer the capabilities to view and track fleet device change requests in real time.
- **Multivendor support.** Multivendor procurement and support capabilities have expanded over the past year, with services for over 30 brands. Service includes hardware support and supplies replenishment for models from all major brands. Canon, Epson, Fujitsu, Konica Minolta, Kyocera, Lexmark, Okidata, Panasonic, Ricoh, Xerox, Zebra and others are supported. In addition to hardware support, the base level support for multivendor models includes supplies management/auto-replenishment, remote monitoring, fleet maintenance services, and fleet administration. HP's security services also help address multivendor fleets.
- **Proactive supplies management.** This includes automated supplies replenishment services, which have been enhanced to be based on historical consumption (based on days-based-thresholds technology to provide 'just-in-time' supplies replenishment based on observed consumption patterns rather than remaining toner or ink levels.) This approach allows HP to manage usage thresholds with minimal customer intervention. HP also has a reporting system that shows the customer where toner/ink may be wasted, and how to target educational activities to minimise waste and conserve resources.
- **Billing.** HP offers a variety of billing options including:
  - **Level Pay.** A monthly fee is paid based on the projected annual ink/toner usage. At the end of the year a consolidation is carried out, reconciling the amount of consumables actually used against the forecast that has been billed.
  - **Base plus Click.** A base fee is paid, which covers the hardware and any fixed services. A click charge is also paid based on the variable charge.



- **Pages included plus excess click.** A base fee is paid, which covers the hardware, any fixed services and a minimum volume of pages. A customer pays the base fee for any under-usage, and an over-usage charge based on the number of pages above the forecasted volume in addition to the base fee.
- **Custom.** HP will work with clients to design a customer billing programme to meet their needs.
- **Reporting.** HP offers comprehensive reporting through the Service Portal and Device Control Center along with regular strategic business reviews conducted by the Account Delivery Manager (ADM). The ADM is a dedicated point of contact who monitors all aspects of the business to ensure SLAs are met, using data-driven analysis to identify, recommend and implement improvements (including workflow automation opportunities). This proactive approach is supported by HP's Business Intelligence model that includes predictive analytics and print policy optimisation to ensure continuous improvement. Device Control Center (CDD) provides instant visibility and manageability of MPS devices in a highly-secure user interface. Users can search and drill down to view device attributes, make non-contractual changes, run reports, and export data as needed. With the appropriate user permissions, they can also order supplies and place service requests.
- **HP remote management centres (RMCs).** These global and geographically diverse centres provide direct regional coverage, local language support and around-the-clock monitoring in over 26 languages. RMC personnel remotely monitor, diagnose, and resolve device issues, using a configurable set of tools to align with the customer agreement. HP personnel regularly review device data to proactively recommend service, leading to improved device uptime and reliability. In addition to proactively monitoring alerts and remotely applying the appropriate fix, RMCs cover back-office tasks such as data analytics and reporting, billing, call-centre and help-desk duties, dispatch services, account administration, supplies management, and firmware updates. RMCs also are ISO27001-13 certified and help deliver the unique HP Governance and Compliance service.

## Service offerings

HP offers a comprehensive range of services, which include the following:

- **Diagnostics and assessment services.** HP offers a vast range of assessment services, from simple online analysis to sophisticated discovery and design services. Customers can choose from the following:
  - **HP Managed Print Analysis.** A free online tool that quickly assesses a customer's office printing environment. A customised report identifies inefficiencies and outlines recommendations for increased efficiency and reduced costs.
  - **HP Secure Print Analysis.** A free online tool that allows a client to self-evaluate their print security practices. The tool generates a private checklist of fundamental and advanced printer security actions in five focus areas: device, network data, access control and authentication, monitoring and management, and documents.
  - **HP Security Manager Quick Assess.** A free, no obligation, security risk assessment of up to 20 HP printers/MFPs. Access to HP technicians and an online assessment (via a download) enables a client to receive a report on 13 of the most common security settings.
  - **HP Industry Benchmark Analysis.** Provides benchmark cost estimates by industry, providing a predictive model appraisal of potential print spend, comparing to benchmark metrics. This model is powered by All Associates Group using Enterprise Document Assessment Methodology (EDAM), which measures over 270 industries across 56 segments. The model also measures over 300 occupational descriptions within the segments.
  - **HP Optimisation Assessment.** This provides recommendations for a future-state fleet design that goes beyond simple ratios to incorporate recommendations for solutions and longer-term strategies.
  - **HP Managed Environment Assessment.** This analyses the impact of print output and provides findings, recommendations and a preliminary business case for moving to a managed services approach.
  - **HP Eco Printing Assessment.** This evaluates the current print-related carbon footprint, offers recommendations for improvement and projects the positive impact of changes on the future carbon footprint.
  - **HP Security Advisory Services.** A broad range of services that offer a holistic approach to developing quantitative and qualitative understanding of security exposures based on industry regulation and best practices. Provides recommendation towards security remediation and recommended steps and a business case for security remediation. Credentialed security experts assess client's print security vulnerabilities, build a comprehensive print security policy based on business needs and best practices, and create a plan to achieve improved security within their unique environment. For organizations looking for ongoing help, the HP Advisory Retainer Service reassesses every six months and provides audit and breach assistance.
  - **HP Workflow Discovery.** Identifies business-critical, paper-intensive processes and provides a customised workflow analysis and the business case for informed decision making.



- **HP Discovery and Design:** Consultative service that provides a comprehensive view of the existing environment and designs an optimised environment for the future, using the Lean Six Sigma methodology. This is a standard assessment service provided as part of HP's MPS offering.
  - **HP Digital Workflow Consulting Services:** Provides professional services e.g. consultation, business and technical assessments, as well as implementation and solutions integration services (includes business optimisation plans, architecture and deployment plans, as well as rollout/implementation.)
- **Fleet optimisation and planning.** HP right sizes the printer fleet and manages ongoing optimisation through a dedicated team that includes solutions architects and transition managers for the initial implementation. The account delivery manager ensures ongoing optimisation and future state recommendations. HP's Management of Change (MoC) model and toolset help deliver a structured approach to facilitating planned change within an organisation, shifting from a current state to a desired future state. Components include sponsorship and governance recommendations, communication strategies, tools and templates, and training designed to help end-user acceptance and adoption of the new environment.
  - **Project management.** HP uses Lean Six Sigma and ITIL methodologies, handling simple to complex MPS engagements. In the direct model, HP consultants manage the implementation according to a governance model that defines roles and responsibilities, operational processes, risks plans, roll-out schedule, and the transition and transformation programme on a country by country and global basis.
  - **Onsite support.** HP offers a variety of onsite staffing solutions. Onsite administrators (OSAs) can be leveraged for various customer locations or dedicated to a single one and provide a variety of services. These include web-based software and processes to proactively monitor and manage fleets, preventative maintenance and troubleshooting, consumables support, first level device support and troubleshooting, spare device replacements and end-user training.
  - **Remote support.** HP Device Connect collects and reports usage data from entire print environment. Remote fleet engineers continuously watch the printing environment to ensure optimised queue management as well as providing rapid, proactive issue resolution. HP can automatically push firmware and security upgrades – after pushing an upgrade HP remotely tests to ensure a client's print environment is current and working properly. HP also uses unaided service dispatch. HP's sophisticated technology proactively identifies issues and determines the most rapid solution—an automated remote fix or an immediate dispatch of a service technician.
  - **Service Portal and Device Control Center.** HP Service Portal is a highly secure website that enables clients to view its HP Managed Print Services contract, usage reports, and printer fleet details online. Clients can easily order supplies, preventative maintenance kits, and initiate next-business-day onsite hardware support. Benefits include visibility and transparency, ease of access to reports, account information and an ability to initiate service requests. HP delivers a global integrated support desk, world-class services and access to information through a common, simplified services portal for rapid issue resolution and an optimal print environment. Investments continue to be made to the portal to enable near time dynamic fleet analytics
  - **HP Enterprise Production Print Solutions.** HP's MPS production printing offering evolved this year. It continues to offer onsite copy/print and mailroom services. Output management and data centre print outsourcing is managed through partnerships. While HP still supports HP S900 Series MFPs, its new line-up of A3 devices are more of a focus. Expanding the HP portfolio with HP PageWide XL broadens technical print capabilities – effectively delivered and supported through HP MPS. Printing systems like web presses address need for very high volume, personalised printing. Web-to-print offerings continued to be supported, on a regional basis.

## Solutions

HP's extensive installed base has attracted over 125 solutions developers with over 300 solutions. HP's JetAdvantage Partner programme offers accreditation, test and certification (ACT), and HP's Open Extensibility Platform ensures that solutions are integrated with HP's MFP hardware portfolio.

HP's solutions include:

- **Cloud/fleet management.** This includes print management solutions such as Web Jetadmin, Universal Print Driver, Open Extensibility Platform and HP's FutureSmart Firmware, which offers remote firmware upgrades. HP Device Connect (formerly HP Management Server) and UDC (multivendor monitoring) provide additional management options.
- **Mobility.** HP has been a leader in mobile printing innovation since 2009 with the first managed mobile print solution ePrint Enterprise. HP has perhaps the broadest range of mobile print solutions so that printing is fast,



reliable and boosts productivity. HP claims to be the market leader in 'out of the box' enabled mobile print. HP print compatibility is built into more mobile devices than any other print manufacturer.

- **Business cloud solutions.** Support mobile workers and guest printing through PrinterOn Enterprise as well as HP Roam Business. PrinterOn Enterprise solution is targeted at enterprises where security, guest printing capability and multi device support is of paramount importance. HP Roam Business is targeted at SMB customers who invest in HP equipment. Both solutions are cloud based, while PrinterOn Enterprise also offers an on premise option.
- **Direct print solutions.** Simple, secure printing from a mobile device via HP wireless direct or WiFi Direct for a peer-to-peer connection. Available on all key operating systems (iOS, Android, Google Chrome and MS Windows.) Uses the built-in, native OS print capabilities on the mobile device.
- **Security.** HP's JetAdvantage Security portfolio provides an end-to-end approach that includes solutions that secure the device, data and document. HP's JetAdvantage Security Manager includes policy creation and editing features to develop and apply a single corporate security policy across an entire fleet of HP devices. The solution also automates the application of device certificates and automatically restores printers to the company's security policies to new printers added to the network or after a re-boot. HP also offers a modular range of secure print solutions through its HP Access Control portfolio to add layers of authentication, data loss prevention, support compliant document workflows (i.e. pull printing), job accounting and add controls on device usage and feature access (i.e. default duplex printing). HP enhanced its global JetAdvantage Security Advisory Services for MPS customers, and continues to apply broader HP security capabilities into MPS-related industry workflow solutions.
- **Workflow/digitisation.** This includes solutions such as HP embedded capture, capture and route, digital send software and Flow CM. From a hardware perspective, HP's Flow MFPs are designed to help customers get control of 'big data', provided as an on-demand service, as well as Flow MFPs, which enable the capture, indexing, storage, search and retrieval of information – whether it resides as a document, email, voice, video, web page or other format. For advanced content management capabilities, the HP Flow MFPs can be integrated with a range of HP and HP partner solutions.
- **HP Industry solutions.** HP offers 32 industry specific solutions across the financial services and insurance, public sector (government/education), manufacturing and distribution, communications/media/entertainment, and health care sectors. This includes solutions across cloud/fleet management, mobility, security, workflow and digitisation.

## Partnership strategy

- **Alliance partners.** Major alliance partners include Accenture, Capgemini, DXC, Deloitte, TCS, Tech Mahindra, PwC and WiPro.
- **Channel-led MPS.** The HP Partner First MPS Specialization is a channel partner programme available in 20 countries and is a critical part of HP's growth initiatives for expanding its MPS penetration amongst the SMB, mid-market, and enterprise. It is designed to meet a spectrum of channel partner requirements to be successful in the contractual Print business. The programme has two tiers:
  - **Select.** This tier is for HP's traditional IT-oriented channel partners seeking to grow their contractual print business. Select partners have access to HP's complete portfolio of transactional A3 and A4 portfolios and HP's new Managed A4 portfolio.
  - **Premier.** This tier centres on the unique service and support needs of copier dealers selling more complex A3 devices and is limited to partners with qualified service teams. Premier Partners have access to the Select Partner portfolio as well as exclusive access to HP's new Managed A3 portfolio.

One of the distinct advantages HP provides its MPS partners is access to a continuum of service offers that complement a partner's capabilities and geographic coverage:

- **Managed Support Contracts.** For partners without service technicians. Rather than purchase individual support care packs per device upfront, partners can aggregate all HP devices under a single support contract with HP and pay monthly. This gives partners the flexibility to add, swap or remove devices over the life of the contract.
- **Managed Supplies Contracts.** For partners with service technicians but with a supply-replenishment infrastructure. Managed Supplies Contracts enables them to combine HP's supply-replenishment services with their own break/fix services.
- **Managed Page Contracts.** For partners with field-based IT service sales and billing capabilities but not in Print. Partners can resell a Managed Page Contract, where HP delivers all MPS services and bills the partner.



The HP Partner First MPS Specialization allows resellers to own the customer contract and access HP cloud-based pricing and proposal tools, services, fleet analysis and real-time reporting capabilities. It also includes sales support, training, and marketing and co-branding opportunities. It includes HP Express Decision Portal, a cloud-based application that connects customers, partners and HP support together in one portal for services, supplies and maintenance. The platform provides partners with proposal and quote generation for cost-per-page pricing, client invoicing and reporting, device monitoring, and account and contract management.

- **Global Solutions Partners.** HP's Jet Advantage software partner programme has over 125 partners with over 300 solutions and 32 targeted industry solutions that leverage its partners' capabilities. Partners can develop applications for HP devices based on HP's Open Extensibility Platform, and get authorised (and their solutions certified) through the Accreditation, Certification and Test programme. HP spends over 800,000 hours/year testing partner solutions on HP platforms. HP estimates that it has over 12M+ solutions-enabled devices.
- **ePrint partners.** HP is expanding its ePrint partner ecosystem, which includes companies such as Salesforce.com, Good, Mobile Iron and DocuSign (eSignatures).
- **Systems Integrator partners.** HP works with global, regional and industry-specific systems integrators. Enterprise-focused systems integrators give HP's MPS extensibility into BPO/ITO opportunities, as well as 'everything-as-a-service', mobility, and cybersecurity opportunities.



## About Quocirca

Quocirca is a primary research and analysis company specialising in the business impact of information technology and communications (ITC). With worldwide, native language reach, Quocirca provides in-depth insights into the views of buyers and influencers in large, mid-sized and small organisations. Its analyst team is made up of real-world practitioners with first-hand experience of ITC delivery who continuously research and track the industry and its real usage in the markets.

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

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