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: Xerox

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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.

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  - **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.

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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.

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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.

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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.

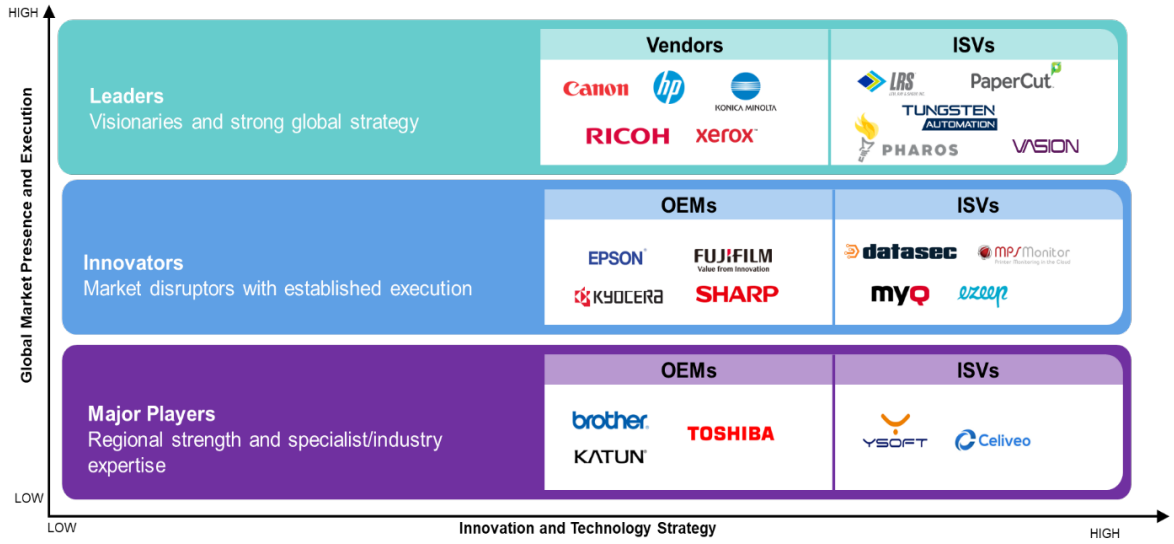

Figure 4. Quocirca ACT Leadership Landscape

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: Xerox

Quocirca opinion

Xerox is positioned as a Leader in Quocirca's 2026 ACT assessment, which evaluates vendor capability across Automation and AI, Cloud, and Technology Ecosystems. This leadership reflects the breadth, maturity, and integration of Xerox's offerings, alongside a clear strategic direction that extends well beyond traditional print. AI is positioned as foundational across its service offerings, supporting predictive maintenance, workflow automation, intelligent document processing (IDP), and production print optimisation.

Innovation at Xerox is embedded across products, services, operating models, and go-to-market execution. The establishment of a dedicated Digital Services business, alongside the continued scaling of Xerox IT Solutions, reflects a deliberate shift toward high-value, recurring services and reinforces Xerox's evolution into a broader technology and services partner.

Embracing agentic AI

Xerox's strength in Automation and AI is based on its ability to embed intelligence across devices, workflows, cloud platforms, and services. Early innovations include the launch of the first AI-assisted MFP, the Xerox AltaLink 8200 Series, and the CareAR service solution. Xerox stands out for its comprehensive AI workflow ecosystem and its use of AI to enhance service delivery in areas including parts failure prediction and inventory management, proactive device failure alerts, call resolution recommendations, and AI-enabled monitoring of print devices.

Notably, Xerox is also an early mover in adopting agentic AI. X.Assist, a framework of AI agents that collaborate with employees and customers to automate tasks, optimise workflows, and accelerate decision-making, is at the core of its strategy to embed agentic AI across every function, solution, and service. Xerox expects 50–70% of work to be optimised or executed by AI agents by 2027. An AI Hub acts as a centralised platform designed to support the effective evaluation and deployment of generative AI use cases and technologies. Xerox describes it as a driving force for innovation, enabling the organisation to fully harness generative AI to improve its processes, products, and services.

Xerox Workflow Central, ConnectKey apps, and the EveryDoc IDP app serve as entry points into a broader ecosystem of IDP and RPA (robotic process automation) managed services. Xerox's integrated IDP platform unifies proprietary and third-party AI technologies across the document lifecycle.

The combination of on-device intelligence, cloud-based workflow orchestration, and enterprise-grade automation enables Xerox to support customers at different stages of digital maturity, from task-level automation through to end-to-end process transformation. Formal governance structures further reinforce the responsible, secure, and scalable use of AI across the portfolio.

Advanced cloud portfolio

Xerox has evolved its portfolio to support distributed and hybrid work environments through cloud-native and hybrid platforms that reduce infrastructure complexity while maintaining security and control. Cloud print management, workflow automation, content services, analytics, and security are delivered as integrated platforms rather than isolated tools, enabling consistent deployment and management across locations.

Xerox's cloud strategy is strengthened by its role as a Microsoft Tier 1 Cloud Solution Provider, enabling it to support customers across Microsoft 365, Azure, and Copilot through licensing, migration, optimisation, and ongoing management. This positions Xerox as a cloud services partner with long-term customer engagement, rather than solely a technology supplier.

The company has one of the broadest cloud print services portfolios, covering secure print and capture alongside comprehensive reporting for both enterprises and SMBs. Its cloud-first strategy enables direct-to-cloud device connectivity, zero-trust-based print security, centralised fleet management, and flexible deployment across office, remote, and hybrid environments. Xerox Workplace Cloud, which forms the foundation of its cloud MPS offering, remains one of the most feature-rich cloud platforms available.

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The Lexmark integration is expected to enhance Xerox's strengths in workflow automation and cloud capabilities, particularly through the Lexmark-developed, AI-enabled, IoT-driven Optra Platform and Lexmark Optra Edge, which provides a complete infrastructure for deploying and running advanced visual AI capabilities at the edge, alongside cloud services for managing, monitoring, and updating AI deployments.

Ecosystem-driven platform leadership

Xerox combines its own platforms with a broad set of strategic partners across security, automation, analytics, IT infrastructure, and industry-specific solutions to deliver integrated, outcome-focused offerings. The expansion of Xerox IT Solutions significantly strengthens this capability, particularly in cybersecurity, AIOps, managed services, and cloud operations. By orchestrating partner technologies into cohesive solutions, Xerox reduces complexity for customers while delivering enterprise-grade capability, particularly for SMB and mid-market organisations that lack extensive in-house IT resources.

Xerox further strengthens its technology ecosystem through a growing marketplace strategy that supports scalability, partner enablement, and customer choice. Xerox participates in cloud marketplaces to extend the reach of its digital offerings, with selected Xerox and Lexmark solutions available via the Microsoft Marketplace, alongside its own Xerox App Gallery, which enables customers and partners to access apps and cloud services within its broader ecosystem.

The next phase for Xerox

The next year will be critical for Xerox. The successful integration of Lexmark and continued execution of its reinvention strategy will determine how effectively Xerox can translate strategic ambition into sustained market impact. Portfolio harmonisation, organisational integration, and consistent delivery across hardware, software, and services will be key. If executed well, Xerox is well placed to reinforce and extend its leadership position; however, execution will be closely watched as the company moves from transformation to scale.

Automation and AI

Automation and AI form the core of Xerox's 2026 strategy, with a clear emphasis on embedding intelligence across devices, cloud platforms, workflows, and internal operations. Xerox delivers a continuum of automation, from on-device apps that streamline everyday tasks to advanced intelligent document processing (IDP) platforms that extract, classify, and operationalise unstructured information at scale. Critically, Xerox balances automation with governance. A centralised AI Council, staff education, and formal oversight mechanisms help ensure ethical, secure, and responsible use of generative and agentic AI across both customer-facing and internal environments.

MPS

AI is deeply integrated into Xerox's MPS strategy through predictive maintenance, fleet optimisation, workflow automation, and service delivery. Capabilities such as predictive AI dashboards, Quick Resolve, Adaptive Learning on MFPs, and AI-enabled production print workflows demonstrate practical, applied innovation rather than experimental use cases. Xerox's ambition to have a majority of work optimised or executed by AI agents reinforces its long-term commitment to automation-led efficiency gains.

In addition, Xerox is enhancing its MPS service delivery with Solver, a 24/7 multilingual, AI-powered virtual assistant available across multiple Xerox platforms and designed to improve client self-service and boost first-contact resolution. For security, Xerox has also developed a security dashboard and security templates that help customers monitor and deploy security settings, while security apps, such as auto-redaction, use AI algorithms to enhance functionality.

AI-enabled MFPs

Xerox's MFPs are pre-loaded with AI-enabled apps that allow users to summarise documents, convert handwritten notes, and automatically redact sensitive content. Xerox Adaptive Learning uses AI-based algorithms to analyse usage patterns, learn from user behaviour, and automatically adjust device settings to streamline workflows.

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Intelligent Document Processing (IDP)
Xerox's IDP capabilities comprise a suite of AI-powered components that streamline and enhance document workflows, including data capture, Named Entity Recognition (NER), Natural Language Processing (NLP), and semantic analysis to accurately extract and process meaningful information. They also include machine-learning-based document classification to automatically categorise documents, alongside image-enhancement algorithms that improve readability and reduce processing errors.

Xerox EveryDoc IDP uses AI-powered data extraction and built-in GenAI prompts to support multi-channel document ingestion, intelligent data extraction, and smooth integration with business applications. Xerox Capture and Content Services leverages IDP, AI, RPA, and machine learning to enable advanced multi-channel capture, document processing, and end-to-end automation.

Predictive analytics
Xerox's advanced analytics approach uses a consistent global process for collecting and unlocking data intelligence across the full contract lifecycle. Xerox MPS Advanced Analytics delivers AI-driven insights from thousands of data points across Xerox- and partner-managed devices worldwide, helping clients optimise print, reduce costs, address security risks, and improve environmental impact through near real-time, self-service analytics presented in a single pane of glass.

Xerox has also integrated its Predictive AI Dashboard, which provides colour-coded visibility into device status, tickets, supplies information, and device failure probability.

Xerox IT Solutions
Xerox's AIOps-enabled Network Operations Center delivers 24/7 intelligent monitoring, real-time analytics, and predictive insights across the entire IT environment. The platform applies machine learning to correlate events, reduce alert noise, and automate incident handling. Xerox aims to shift IT operations from reactive troubleshooting to proactive, predictive management that improves efficiency, uptime, and overall IT performance.

Cloud and collaboration

Cloud is a foundational enabler of Xerox's automation, collaboration, and security strategies. Xerox and Lexmark offer mature, cloud-native and hybrid print management platforms designed to reduce on-premises complexity while supporting distributed and hybrid work environments.

Key strengths include serverless printing, secure cloud authentication, centralised fleet and security management, and automated updates that reduce IT burden. Cloud platforms such as Workflow Central, DocuShare, Digital Hub, and Cloud Print Services extend Xerox's reach beyond print into content automation, digital communications, and brand-controlled output management.

Xerox's role as a Microsoft Tier 1 Cloud Solution Provider further strengthens its cloud proposition, allowing it to act as a single, trusted adviser for Microsoft 365, Azure, and Copilot adoption. This positions Xerox as both a technology provider and a cloud services partner, capable of supporting customers through migration, optimisation, and ongoing management.

Cloud print management
Xerox and Lexmark cloud print management solutions deliver device authentication, fleet management, security, print management, cost control, and secure mobility workflows. Xerox provides a suite of globally available, multi-tenant, cloud-native applications with flexible deployment options across on-premises, private-cloud, or multi-tenant public-cloud environments.

Built on the Azure platform, Xerox Workplace Cloud forms the foundation of its cloud MPS offering, encompassing print management, secure fleet management, mobile print, analytics, and support for a broad portfolio of Xerox Workflow Solutions based on its ConnectKey and Lexmark eSF technologies.

Workplace Cloud Print Management delivers authentication, pull printing, fleet management, fleet security, print management, cost control, and secure mobility workflows. Xerox Smart Fleet Management provides automated

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discovery, monitoring, management, and security policy compliance for multi-brand networked printers through a single global, cloud-native platform.

Cloud-based automation
Apps available in the Xerox App Gallery create a seamless path between the MFP and chosen cloud repositories, enabling users to scan files directly into folders and print directly from the cloud using any device. Xerox Workflow Central simplifies the conversion of physical and digital files into usable formats and delivers cloud-based document workflows, such as handwriting-to-text, redaction, and translation, many of which leverage AI to streamline document conversion and management.

Cloud security
Xerox follows industry best practices in cloud security, including encrypted user authentication, scheduled backups, off-site storage, and site replication. Its MPS offering supports a zero trust architecture. The company has achieved SOC 2 Type II certification for its MPS tool suite and Xerox Workplace Cloud, and was the first print vendor to obtain FedRAMP and GovRAMP certification for cloud-based managed print services.

Workplace Cloud Content Security uses AI to process printed documents and identify when key content is being printed, alongside relevant attributes that help assess the security impact of that activity. Xerox has also adopted a cybersecurity mesh architecture to ensure interoperability and coordinated security policies across its solutions.

Technology Ecosystems

Xerox's ecosystem strategy is a clear differentiator, combining proprietary platforms with deep, strategic partnerships across security, cloud, analytics, and automation. Integrations with leading vendors such as Microsoft, Palo Alto Networks, Cisco, and Trellix extend Xerox's capabilities while reducing complexity for customers.

The combined Xerox-Lexmark ecosystem enhances IoT and edge intelligence through connected devices, sensor data, and predictive analytics, enabling smarter workplaces and proactive service models. Xerox IT Solutions further expands this ecosystem with cybersecurity, AIOps, and managed services tailored to SMB and mid-market needs.

For the channel, Xerox's ecosystem approach supports consultancy-led engagement, enabling partners to deliver integrated, outcome-focused solutions aligned with customer maturity and industry needs. This reinforces Xerox's shift towards platform-based value creation and long-term customer relationships. Xerox's Power of Collective programme and the 2026 Global Accelerator Network are designed to elevate partner capability at scale through immersive enablement, shared best practices, and real-world use-case collaboration. Structured specialisations, certifications, joint planning, and ready-to-deploy advisory assets accelerate partner maturity and standardise high-value consultancy practices.

Partners have access to a broad, integrated ecosystem spanning workflow software, MFP apps, embedded capabilities, and interoperability with customer IT environments. This enables the creation of tailored, scalable solutions aligned to customer industry needs and digital maturity, addressing priorities across security, automation, sustainability, and digitisation.

The Xerox Workplace Cloud Platform provides a foundation for both direct and channel operations to extend beyond fleet management and deliver additional value-added services, including print management, security solutions, analytics, and single sign-on user management for ConnectKey and Workflow Central apps.

Selected Xerox and Lexmark digital offerings, including DocuShare Go and the Lexmark Optra platforms, are available through the Microsoft Marketplace, extending reach and simplifying procurement for customers already standardised on Microsoft cloud environments. In parallel, the Xerox App Gallery operates as a proprietary marketplace, enabling customers and partners to access, deploy, and purchase apps and cloud services such as Workflow Central and production workflow tools. This dual-marketplace approach reinforces Xerox's ecosystem strategy by combining global cloud distribution with a curated device- and workflow-centric app environment, supporting faster adoption of automation, AI-enabled services, and partner innovation.

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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.

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