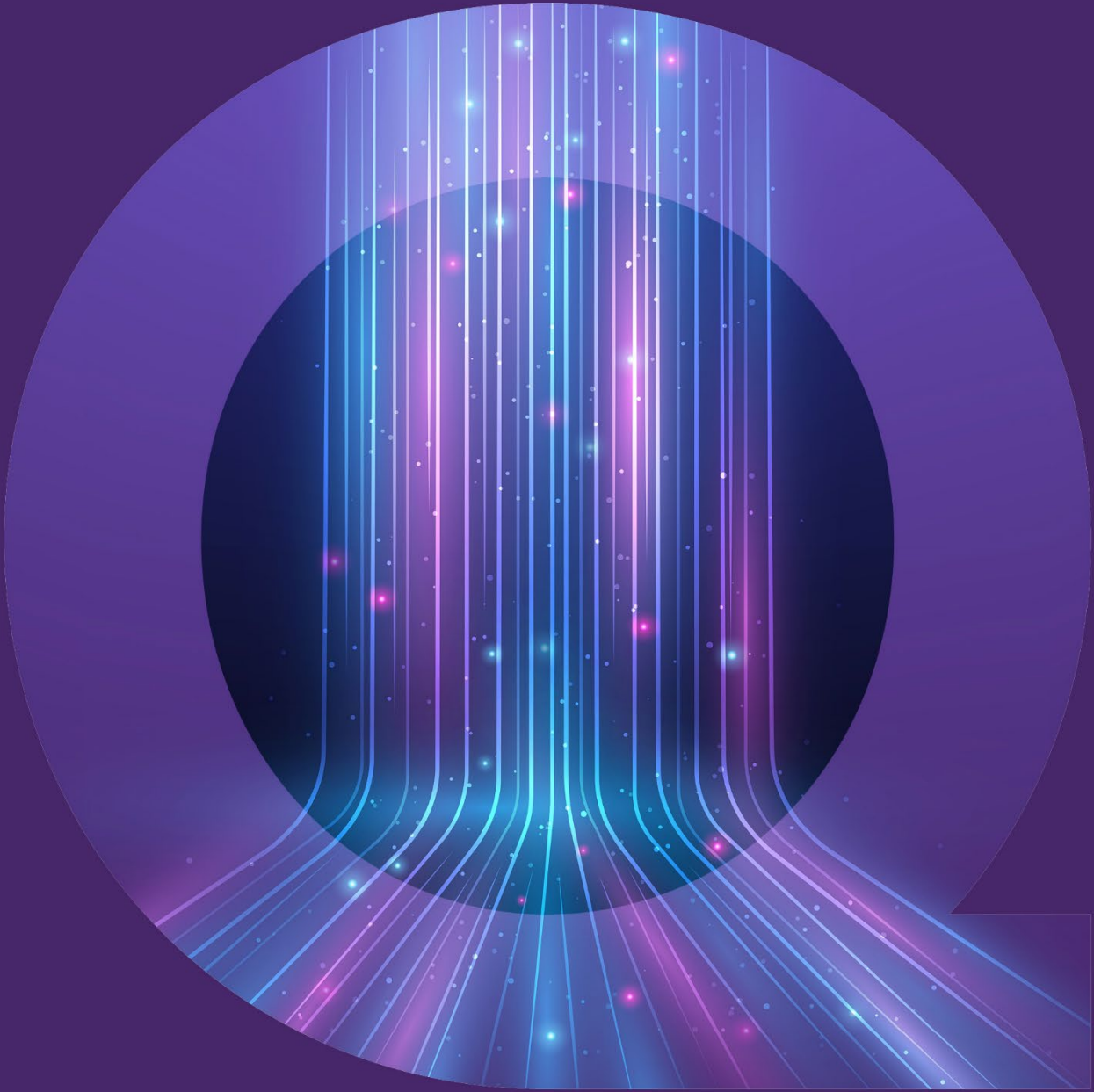


# **ACT: Print Industry Ecosystem Leadership**

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



## Introduction

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

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

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

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

## Methodology

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

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

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

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## Key findings

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

- **Sharp** is evolving into a broader workplace technology and services provider, strengthening its ACT positioning through cloud platforms, managed services, and a growing IT and security ecosystem.
- **Major players are defined by established execution and specialist expertise.** This category includes Katun, which is developing its ACT capabilities through a partner-led, open-architecture approach, with a focus on secure hardware foundations, telemetry, and data-driven service enablement.

## 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.

## 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.

## Vendor profile: Sharp

### Quocirca opinion

Sharp is positioned as an Innovator in Quocirca's 2026 Print Industry ACT Leadership report. Sharp is transforming from a hardware-centric print provider into a trusted technology services provider for SMEs and mid-market organisations across Europe, strengthening its capabilities, credibility, and competitiveness through an expanding services portfolio.

In November 2025, the company introduced its Sharp unified brand proposition. By bringing IT services, AV, workplace technology, and digital solutions together under a single, cohesive strategy for the first time in its history, Sharp is better placed to position itself as a credible player in the AI- and automation-driven, cloud-centric workplace technology landscape.

The launch of Sharp DX (Sharp Digital Experience), a new brand unifying the company's IT services businesses across Europe, strengthens Sharp's ability to scale beyond print and differentiate. Sharp DX continues to evolve to deliver integrated digital transformation services that unify cloud platforms, managed services, workplace technology, and cybersecurity. This helps organisations seamlessly manage information, infrastructure, and workflows while supporting secure, sustainable hybrid working.

Sharp's 2026 R&D and innovation strategy is platform-first, centred on engineering the Sharp Services Platform (SSP) as a scalable foundation for moving paper-centric processes into secure cloud workflows. SSP, hosted in Microsoft Azure's German data centre for GDPR compliance, enables Sharp to deploy and deliver new solutions and services at scale, speed, and geographic reach. The platform provides a single point of administration for all SSP-based solutions, offering centralised analytics and insights, a notification gateway for enrolment and system updates, and automated creation and management of secure customer tenants fully integrated with License Manager. It also ensures secure connectivity between applications and services through industry-standard identity management technologies.

Sharp's expanded Synappx solutions help customers extract greater value from their business data while strengthening Sharp's cloud-native capabilities. The launch of Synappx Cloud Print v1.7, featuring embedded scanning to connect Sharp MFPs to popular cloud storage services; Synappx Cloud Capture, the company's first AI-centric software solution; and Synappx Manage, its next-generation cloud-based remote monitoring and management platform, reflects Sharp's progression towards cloud-based automation and the use of predictive analytics for device management.

### Automation and AI

Sharp's AI and machine learning (ML) strategy focuses on delivering practical intelligence across device, cloud, and service layers to improve uptime, efficiency, and sustainability. Synappx products leverage SSP's central administration, analytics, connectors, and tenant services, while AI and ML enable intelligent capture in Synappx Cloud Capture and incorporate internal automation processes to provide fleet services in Synappx Manage.

#### Workflow automation

Sharp combines two cloud-native Synappx products with Sharp DX's managed automation services to deliver secure, scalable digitisation, and workflow orchestration.

Synappx Cloud Capture uses AI to intelligently capture key information from documents across multiple input sources and deliver outputs directly into line-of-business systems, such as accounting or ERP platforms. This represents a significant step forward in advancing AI-enabled workflow intelligence.

Synappx Cloud Print delivers policy-driven print release, queue control, and analytics to optimise print behaviour, reduce consumables waste, and enforce secure workflows.

Sharp DX provides consultative, managed deployments covering cloud orchestration, automation rollout, and ongoing operations, enabling customers to achieve rapid, low-risk adoption at scale.

**Security**

Sharp's Complete Print Security subscription bundles setup, enforcement, and managed monitoring, ensuring devices remain secure from delivery throughout their lifecycle.

**Cloud and collaboration**

Sharp's cloud-native and hybrid print management strategy combines native Sharp solutions with a broad partner ecosystem to support flexible deployment models.

**Cloud print management**

Synappx Cloud Print eliminates the need for on-premise infrastructure and supports secure, seamless printing for both office-based and remote users. Designed around zero-trust principles, data is encrypted and print jobs remain within the local network behind a firewall. The solution integrates with Entra ID and Google Workspace to prevent unauthorised access to documents. Key features include pull printing, comprehensive print auditing for compliance, and tools that promote sustainable printing practices through improved visibility and control over print usage.

For on-premise or hybrid environments, Job Accounting II delivers user authentication, cost allocation, reporting, and secure pull-printing capabilities across Sharp MFP fleets.

**Remote monitoring and management**

Synappx Manage is Sharp's next-generation cloud-based remote monitoring and management platform. It provides centralised device administration, remote monitoring to reduce support costs, and seamless integration with the wider Synappx and IT services ecosystem, helping organisations streamline operations and manage hybrid workplaces more effectively.

**Predictive analytics**

Synappx Manage provides remote monitoring, AI-driven analytics, and sustainability reporting across printers, MFPs, and other Sharp devices. This enables organisations to optimise device utilisation, predict consumable demand, and reduce unnecessary service visits or shipments, supporting lower operational carbon footprints<sup>1</sup>. The Sustainability Dashboard further encourages responsible behaviour by ranking users' environmental impact—such as paper saved—across the organisation and the wider Synappx Cloud Print community.

Synappx Manage's extensible platform design integrates with managed service and business platforms such as ConnectWise PSA and ERP systems. This open approach allows customers and partners to connect Sharp device data with existing IT, service management, and workflow tools, turning operational data into actionable insights that enhance productivity, service delivery, and decision-making

**Technology Ecosystems**

Synappx Cloud Print integrates with intelligent document capture and workflow technologies built on Azure Intelligent Document Processing, enabling automated document classification, OCR, and data extraction directly from Sharp MFPs. This transforms scanned information into structured data that can flow into enterprise workflows and business systems, while also supporting partner integrations such as Print.io and Optimidoc.

Sharp platforms, including Synappx Cloud Print and Synappx Manage, also integrate with Microsoft 365 and Google Workspace to deliver secure cloud printing, scan-to-cloud workflows, identity integration, and centralised device analytics. These capabilities support secure pull-printing, advanced reporting, and policy-based governance across hybrid environments.

Sharp's open software ecosystem, built on Sharp OSA, supports integrations with print management and workflow platforms such as PaperCut MF, PaperCut Hive, YSoft SAFEQ, Print.io, and MyQ. This enables secure pull-printing, cloud-native print management, and detailed reporting across hybrid environments. Together, the Synappx ecosystem and ISV partnerships create a flexible, interoperable environment that allows organisations

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<sup>1</sup> Synappx Manage – Eco Report

to integrate print, document workflows, and analytics with existing cloud platforms, security frameworks, and business applications, while advancing automation and intelligent workplace services.

**Strategic partnerships**

Sharp's partnerships with companies including Bitdefender (anti-malware integration for Future Workplace A3 MFPs), ConnectWise (remote monitoring, access services, and Security Operations Centre), SentinelOne (managed detection and response), SkyKick (Microsoft 365 migration and backup), Microsoft, and CyberSmart (cybersecurity regulatory compliance services including UK Cyber Essentials and NIS2) are integral to Sharp's journey towards a services-led business model.

## About Quocirca

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

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

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

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

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