Cloud Print Services Landscape, 2025

Navigating market fragmentation, hybrid realities, and evolving customer concerns

QUOCIRCA

Executive summary

As the era of hybrid work becomes embedded, organisations are increasingly focused on digital transformation, while building resilient IT infrastructures that can adapt to the future. With its inherent availability, flexibility, and scalability, the cloud has underpinned this journey beyond traditional on-premise environments, enhancing agility, data compliance, and security while providing opportunities for improving financial and environmental cost management.

Cloud-based print management can directly address these needs by reducing the burden on IT teams and lowering associated variable costs around power, maintenance, real estate and availability. Traditional print management, reliant on on-premise print servers, demands extensive IT administration. A cloud-based model can simplify these tasks, freeing IT teams for strategic initiatives such as further business value-add digitisation activities.

However, the cloud print market remains fragmented, characterised by differing approaches – 'cloud-first,' 'cloud-native,' and hybrid – demanding clarity from OEMs and ISVs regarding their cloud-centric and native offerings. The cloud is often a lower priority for MPS selection, highlighting a need for greater market education. Security, performance, and feature parity concerns persist, acting as inhibitors to full cloud adoption and solidifying the hybrid approach as the prevailing model. Furthermore, a trend toward workload repatriation is emerging, driven by data sovereignty, latency, and cost considerations. This adds complexity, requiring flexible solutions that integrate seamlessly with both on-premises and cloud environments. UK and midmarket organisations demonstrate higher average importance for cloud print, highlighting regional and segment-specific variations in adoption drivers.

Crucially, the rapid advancement of artificial intelligence (AI) is accelerating cloud adoption and reshaping the demand for cloud print solutions. The demands for AI-powered automation, predictive analytics, and enhanced security compel organisations to embrace cloud platforms for their IT infrastructure. This AI-driven acceleration will increase the need for seamless integration of cloud print services with broader cloud ecosystems as organisations seek intelligent and efficient document management workflows.

To succeed in this evolving landscape, MPS providers and ISV partners must:

- **Prioritise education.** Bridge the awareness gap by demonstrating the clear value proposition of cloud print, focusing on security, cost efficiency, and workflow optimisation.

- **Offer hybrid solutions.** Cater to the prevailing hybrid cloud reality by providing flexible and adaptable solutions that integrate seamlessly with diverse IT infrastructures, while offering a way forward to more complete cloud-based solutions in the future.

- **Address security and performance concerns.** Emphasise robust security measures and ensure optimal performance to alleviate lingering apprehensions.

- **Provide clarity on cloud strategies.** Help organisations navigate the fragmented market by clearly defining cloud-native and cloud-centric offerings that align with their specific needs.

- **Acknowledge and mitigate any repatriation concerns.** Understand the drivers behind repatriation and offer solutions that fit this changing landscape.

By addressing these key areas, MPS providers and ISVs can capitalise on the growing demand for cloud print services and help organisations navigate the complexities of the 2025 cloud landscape, ensuring they are well-equipped to support customers with print infrastructure modernisation strategies.

This report highlights key market trends for cloud print services and solutions, covering offerings from original equipment manufacturers (OEMs) and independent software vendors (ISVs). The following vendors are included in this report:

- OEMs: Canon, Epson, HP, Konica Minolta, Lexmark, Ricoh, Sharp, Toshiba, Xerox

- ISVs: Celiveo 365, LRS, Microsoft Universal Print, MyQ, NT-Ware, OptimiDoc, PaperCut, Pharos, ThinPrint/ezeep, Tungsten Automation, Vasion.

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Key findings

- **The cloud print market is characterised by products and services from print and software vendors.** Print vendors typically offer cloud-based MPS or print management solutions that integrate directly within their hardware and software ecosystems, with ISVs offering a range of solutions to support a mixed-fleet print environment. This includes serverless print, cloud, cloud-native, and hybrid cloud print infrastructure solutions.

- **Cloud print management expertise is an important MPS supplier selection factor.** Organisations are looking for ways to accelerate their move to cloud-based print management. Overall, 79% state that it is either somewhat or very important for their print management provider to offer cloud-based solutions, with 72% stating that the benefits of using an MPS provider is accelerating their move to the cloud.

- **While the move to cloud-based IT infrastructure continues, hybrid cloud infrastructure is the dominant approach.** This reflects a pragmatic approach to IT modernisation, where organisations leverage the benefits of both on-premises and cloud resources. This dominance of hybrid cloud infrastructure creates a demand for cloud print solutions that can seamlessly integrate with and manage printing across these diverse environments, as addressed by the specialised offerings of ISVs.

- **Quocirca's assessment of the cloud print market focuses on services and solutions from print vendors (OEMs).** A significant differentiator among cloud print vendors lies in their capabilities beyond basic print management, specifically in offering robust cloud-based capture and intelligent workflow automation, coupled with sophisticated analytics and reporting tools that provide actionable insights into print environments. Leaders include:

  - **Xerox.** Xerox's leading position is attributed to its extensive and well-established portfolio of cloud-based print services and solutions. This strength is further amplified by its integrated cloud workflow automation capabilities and advanced cloud-based analytics.

  - **Canon.** Canon presents a strong cloud offering characterised by its comprehensive scope, covering both office and production printing environments. Its unified strategy, centred around uniFLOW, provides a clear value proposition, particularly in the realm of cloud-based workflow solutions.

  - **HP.** HP has made significant strides in developing its cloud print platform over the past year. A notable offering is HP MPCS for enterprise direct customers, a fully managed cloud infrastructure service incorporating layered HP Wolf Security. This service enables enterprises to migrate their on-premise print infrastructure to the cloud and outsource end-to-end print management to HP under a service agreement. Additionally, HP has expanded its suite of cloud-based workflow solutions, including HP Scan AI.

  - **Ricoh.** Ricoh is actively evolving its cloud presence through its RICOH CloudStream platform, demonstrating a strategic focus on integration by connecting its cloud print solutions with platforms such as ServiceNow and RICOH Spaces.

  - **Lexmark.** Lexmark continues to build out and enhance its cloud services platform, most recently with the launch of the new Lexmark Cloud Solution Center (CSC), which adds AI-powered OCR, translation, and redaction capabilities to its broad range of cloud productivity applications.

  - **Konica Minolta.** Konica Minolta has a comprehensive suite of cloud print and workflow services. Its own-IP-based Workplace Pure cloud print services platform has been developed to fully leverage the benefits of the OEM's proprietary technology. Workplace Pure provides device-agnostic cloud-printing capability, with no added hardware or software needed on-premise.

- **Major players in the market include Sharp, Toshiba and Epson.** These vendors are typically channel centric and focus on the SMB market.

  - **Sharp.** The launch of Synappx Cloud Print in 2024 marks a significant step forward, and Sharp anticipates further expansion of its SSP ecosystem throughout 2025. This includes extending Synappx Manage for remote device monitoring and management across print and display products, as well as enhancing document processing capabilities through AI automation.

  - **Toshiba.** Toshiba offers a different suite of cloud solutions depending on the needs of the region. In Europe and the UK, its portfolio includes e-FOLLOW.cloud and e-BRIDGE Global Print. In the United States, the portfolio includes e-BRIDGE Global Print, Elevate Sky Print Management and other Elevate Sky services.

  - **Epson.** Epson's strength lies in its ability to offer reliable and cost-effective cloud printing, workflow, and service tools solutions that are easy to deploy and manage. Epson's cloud solutions offering includes Epson Print Admin (EPA), Epson Print Admin Serverless (EPA Serverless), Epson Remote Services (ERS), Epson Connect, and Epson Smart Panel.

- **The market is augmented by a diverse ISV landscape.** This provides customers with a multitude of options tailored to specific needs and deployment models. This includes established print management vendors such as PaperCut, which offers PaperCut Hive, and Tungsten Automation, which offers its Hybrid Cloud Print solution that combines a public cloud print platform from Printix and on-premise platform ControlSuite. LRS offers CloudPrint, a serverless solution, and is strongly focused on offering its large enterprise clients flexible and scalable offerings. MyQ offers MyQ Roger, a cloud-native solution, and Celiveo 365 is an enterprise-class serverless print management platform. Pharos Cloud is built as a cloud-native platform designed to eliminate the need for on-premises print servers.

- **Microsoft is driving change in cloud print management.** The Universal Print management platform, integrated within Microsoft 365, is significantly reshaping the cloud-printing space, providing a cloud-based print infrastructure that simplifies print management, enhances security, and reduces reliance on traditional print servers for organisations heavily invested in the Microsoft ecosystem.

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Vendor landscape

Quocirca's vendor landscape for the Cloud Print Services market includes the major MPS providers offering cloud-based services (Figure 6). Independent software vendors (ISVs) have not been included in this vendor landscape or those vendors that did not participate in the vendor submission process. This evaluation of the cloud print services market is intended as a starting point only. Please note that Quocirca's scoring is based on an unweighted model, and prospective buyers should use this as guidance alongside the more detailed vendor profiles to assess suppliers based on their specific requirements.

Quocirca has based this landscape on vendors' completeness of offerings and strategies across the following key areas:

- **Overall cloud strategy and vision.** The comprehensiveness of the vendor's cloud strategy, the quality of its overall value proposition, and its future roadmap.
- **Maturity of offerings.** How long the vendor's cloud print services offering has been established in the market.
- **Geographic reach.** A vendor's geographical reach, either via direct engagement or through the channel.
- **Breadth and depth of service offering.** Provisioning, deployment, and implementation of cloud-based print services, as well as support for hybrid cloud models.
- **Multi-vendor support.** Support for a mixed-fleet environment.
- **Digital workflow automation.** Adjacent cloud-based services to optimise print and digital workflow automation.
- **Cloud security and zero trust.** Approach to zero-trust and cloud security models.
- **Analytics and reporting.** The breadth and depth of capabilities to provide analytics and reporting.
- **Channel tools.** Flexible cloud platforms to support channel partners.

Vendors are categorised as:

- **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.
- **Major players.** Vendors that have established and proven offerings on a regional basis, and may be more focused on a single brand environment.
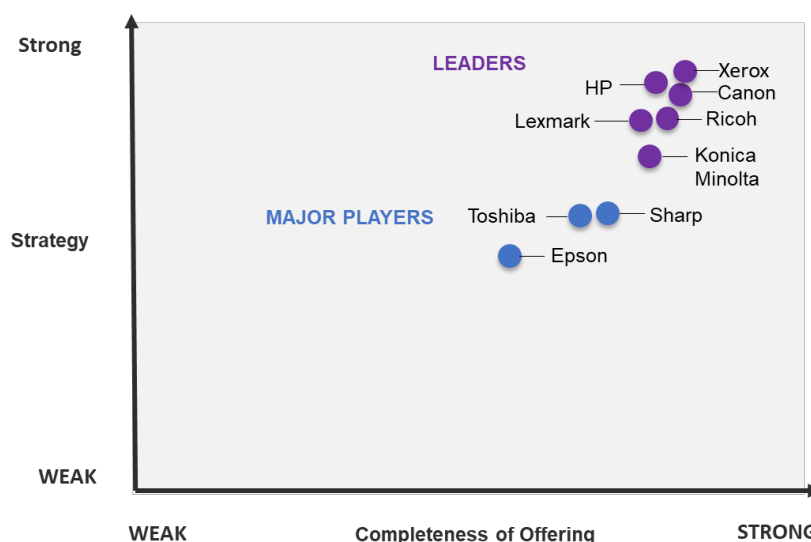

Figure 6. Quocirca Cloud Print Services Landscape, 2025

The Quocirca Vendor Landscape is a graphical representation of Quocirca's opinion of the market and is based on Quocirca's 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 that reflect judgement at the time. All opinions are subject to change. Where a vendor does not submit a survey, Quocirca bases positioning on analyst knowledge.

Vendor Profile: Ricoh

Quocirca opinion

Ricoh is positioned as a Leader in Quocirca's assessment of the Cloud Print Services Landscape in 2025. Its leadership stems from its committed 'cloud-first' strategy, offering flexible and secure hybrid/multi-cloud solutions that directly support customer digital transformation initiatives. Ricoh's scalable infrastructure caters to diverse business sizes, providing both multi-tenant and dedicated hosted environments, while delivering tailored solutions across partner, SMB, midmarket, and enterprise segments, demonstrating comprehensive market coverage and adaptability.

Scalable and secure cloud services

Ricoh cloud print solutions are built on a highly available, scalable infrastructure to support businesses of all sizes. They can be deployed as part of a multi-tenant cloud service or in a reserved hosted environment for very large enterprise and government customers. The company provides tailored solutions for partners, small businesses, the midmarket, and enterprise customers.

Ricoh places security at the core of its cloud print services, incorporating zero-trust security principles, end-to-end encryption, and robust authentication mechanisms to safeguard sensitive documents. Security is further enhanced with industry-leading remote monitoring and management of device security policies, settings, and certificates and commitment to compliance with industry standards such as GDPR, ISO 27001, SOC 2, WCAG, EN 301 549, and Section 508.

RICOH CloudStream and Streamline NX offer additional security features, such as vulnerability audit services, remote management, and automatic updates for device certificates, settings, and firmware, as well as options for data masking in reports. Ricoh supports Microsoft Universal Print across the majority of its portfolio of print devices without the need for a connector. The Ricoh app for Universal Print is available in 20 languages and enables end users to easily dispatch print jobs directly to Ricoh MFPs.

Global IoT device management

Ricoh has integrated its cloud print solutions with ServiceNow and RICOH Spaces, enabling end users to more easily report issues and access asset and support information through a common user experience platform in the workplace. Ricoh cloud print services provide a consistent experience on any device, and with the integration of RICOH Spaces, end users can quickly and easily access print services within the same experience platform they use for booking desks and interacting with other workplace assets. The company plans to expand its global workplace device management platform in 2025 to enable the monitoring and management of all types of (IoT) assets in the workplace.

AI-driven analytics

AI-driven analytics and automation optimise print workflows, predict maintenance needs, and proactively address issues before they impact productivity. Advanced analytics provide insights into print behaviour, which, in particular, help organisations make data-driven decisions to improve sustainability and reduce costs. Data loss detection and protection help detect anomalies and potential threats in print environments and quickly implement remedial actions.

Product overview

RICOH CloudStream

RICOH CloudStream is a comprehensive cloud-based platform designed to streamline and optimise print infrastructures across organisations. Built upon zero-trust principles, RICOH CloudStream's security protocols help prevent data breaches and unauthorised access, ensuring secure document workflows.

Key features include remote device management, the ability to centrally manage and monitor multi-vendor print devices through a unified web-based interface, and remotely deploy driver, firmware, and security updates across multiple devices. RICOH CloudStream also enables secure location-aware printing; pull-printing – print jobs are held in the cloud, on a gateway, or on the user's PC until the user authenticates at a device; and

personalised and automated workflows – end users can scan and convert physical documents to digital formats with OCR and send them to specific cloud folders, such as OneDrive or SharePoint, with a single touch. Reporting capabilities deliver insightful reports to simplify print management and optimise the multi-vendor print environment.

For customers who want to leverage some features of Microsoft Universal Print but require additional functionality for printing, scanning, authentication, remote monitoring, management, or reporting, RICOH CloudStream uses a Windows Protected Print (WPP) mode-compliant driver to enable secure and easy submission of print jobs from Windows PCs to the Ricoh cloud print service.

RICOH Streamline NX (SLNX)
RICOH Streamline NX is a scalable, integrated document management solution designed to optimise print, device, and scan management within midmarket and enterprise organisations.

The solution offers secure pull-print functionality; supports various authentication methods, including network login, PIN, card, mobile, or even password-less FIDO2 authentication; enhances productivity by automating workflows, including manual scan and capture tasks; and enables IT administrators to remotely manage technical changes such as batch configurations, firmware and software upgrades, and driver distributions. Further enhancing functionality are integrations with systems such as RICOH MyPrint to enable quotas, wallets, usage management, and payment services; Microsoft Universal Print to enable printing through Microsoft's Universal Print service; and, effective April 2025, the Ricoh Card Reader Remote Configuration Tool to remotely configure and update card readers from strategic authentication partners such as inepro, rfIDEAS, and Elatec.

RICOH Smart Integration (RSI)
RICOH Smart Integration is a cloud-based platform designed to enhance workplace efficiency by streamlining document workflows and print management. It offers multiple modular apps to allow small businesses and partners to tailor their RSI experience to suit their needs.

The platform provides robust security measures, including zero trust-based authenticated secure printing. Highlights include RSI LogicFlow, allows customers to easily create powerful capture workflows with AI-driven automated data extraction; RSI Connectors, which enable end users to scan documents directly to email or cloud-based storage solutions such as Microsoft 365 and Google Workspace; and RSI Control+, which offers features such as cost allocation, quotas, detailed reporting, and usage trend analysis to help organisations minimise waste, optimise print resources, and achieve cost transparency and savings.

Key differentiators

- **Comprehensive cloud portfolio tailored for all channels.** Ricoh offers three proprietary cloud print solutions as well as third-party ISV platforms, backed by global know-how and processes with local delivery and support, enabling it to tailor its approach to different customer segments.

- **Flexible, scalable deployment options.** SMBs and partners benefit from the simplicity and agility of Ricoh's multi-tenant cloud SaaS subscriptions, while large enterprises and government agencies benefit from reserved hosting data centres and premium SLA options.

- **Strong focus on security.** Solutions deployed as a cloud service for global customers are managed by its ISO 27001-certified Digital Operations Centre (DOC) and Global Security Operations Centre (GSOC).

- **Reporting and analytics.** Ricoh cloud print solutions include analytics and dashboard capabilities, along with APIs for exporting data about customers' devices and usage. Intuitive dashboards, powered by PowerBI, take data feeds from multiple data sources, including Ricoh's cloud print solutions. A single customer reporting portal provides a 360-degree view of fleet performance, as well as a value scorecard measuring the experience levels and value delivered by Ricoh.

- **IoT device management platform.** Customers can access reports and analytics about all Ricoh-managed assets, including printers, lockers, meeting room equipment, wall panels, AV equipment, and sensors.

Recommendations

Buyer recommendations

The cloud print services market continues to evolve. Many organisations are moving away from first-generation cloud-based systems, which have limited per-device functionality via universal print drivers, to newer generation ones whose default functionality is almost equivalent to that obtained via complex, hard-to-maintain dedicated drivers. This leads to better support for mixed printer fleets and frees IT administrators to concentrate on adding value to an organisation's business. However, buyers must ensure that the solution chosen is suitable for the organisation's needs.

Buyers should look to:

- **Design a clear specification for prospective print management solutions.** Identify the key features you need, such as reporting, analytics, security, and pull-printing. Feature sets can vary between on-premise and cloud print management solutions, so verifying that the prospective solution meets organisational requirements and addresses concerns such as cost, environmental impact, and security is essential.

- **Compare the relative merits of fully on-premise, hybrid, and fully cloud-based solutions.** On-premise platforms often come with high upfront costs and significant ongoing management requirements. In contrast, fully cloud-based platforms generally provide fixed pricing and reduce administrative efforts. They are typically easier to integrate with adjacent tools, but they may fall short of meeting an organisation's security and data sovereignty requirements. Hybrid solutions, combining on-premise management for aspects of the print environment with cloud-based management for others, may offer the flexibility needed.

- **Focus on security capabilities.** The print environment sits in the broader enterprise security landscape, and solutions must be able to meet wider standards and integrate well with security monitoring and management tools. Factors to consider include availability of zero-trust support; data encryption throughout the print management process; integration capabilities with adjacent third-party tools such as data leak prevention (DLP), digital rights management (DRM), and identity and access management (IAM); and support for output security features such as smart card release, biometrics, Bluetooth, and PIN printing.

- **Evaluate reporting and analytics features.** Printers and MFPs are advanced IoT devices that provide a wealth of analytical data that can be used to optimise deployments, minimise costs, monitor use, indicate environmental impacts, and maintain availability. Print management solutions should offer comprehensive analysis and reporting capabilities with the option to integrate into wider business intelligence and reporting tools.

- **Compare universal print drivers with proprietary drivers**. Traditionally, universal print drivers offered only basic functionality across a printer fleet, even in standardised setups. Organisations often had to rely on dedicated drivers to access advanced features of more complex multifunction printers (MFPs). However, universal drivers have significantly improved and are now a viable alternative to dedicated drivers. Buyers should carefully assess their requirements to ensure the chosen solution meets their needs. Indeed, Microsoft is changing the way that print drivers will be layered over Microsoft's own environment in the future – ensure that a chosen print provider will embrace this as it happens.

- **Ensure clear, comprehensive, and appropriate pricing.** Cloud print management platform pricing models can vary, with vendors offering per-device, per-user, per-queue, or per time segment models. Specific pricing models may be more advantageous depending on your usage and the number of devices. You should also allow for changes in the size and configuration of the print fleet.

Supplier recommendations

The cloud's growing ubiquity and isolated instances of 'cloud repatriation' underscore the need for flexible solutions. A balanced portfolio of robust cloud and on-premises print management capabilities is essential, empowering customers to adapt their cloud journey according to evolving needs and risk tolerance.

To effectively address this dynamic market, suppliers of cloud-based print services and solutions should:

- **Address the cloud print awareness gap.** Proactively communicate the benefits of cloud print and how they address common concerns around cost control, environmental impact, and security while offering flexibility for scaling environments.

- **Directly address barriers to adoption.** Ensure that your solutions overcome areas that have proved concerning to prospective customers. Proactively address security concerns by demonstrating robust encryption, access control, and threat detection capabilities. Ensure your solution integrates well with third-party security tools, as well as meeting relevant regulatory and industry-specific standards. Offer solutions that allow customers to control their data and comply with regional regulations, leveraging sovereignty services provided by the cloud provider. Look to deliver optimised, provable and predictable performance, addressing concerns about latency and reliability. Continuously improve cloud print management offerings to match or exceed the functionality of on-premises systems. Provide transparent and predictable pricing models, demonstrating clear cost benefits and ROI.

- **Offer tailored migration strategies and embrace hybrid flexibility.** Guide customers through their cloud journey, providing expert advice and customised migration plans. Offer seamless integration between on-premises and cloud solutions, enabling gradual migration and mitigating repatriation risks. At the same time, understand the factors where organisations are considering workflow repatriation; ensure solutions address common concerns; and build confidence.

- **Develop cloud-native and cloud-centric offerings.** Help customers navigate the fragmented market by developing offerings supporting every stage of their cloud journey. Clearly define each solution and provide consultancy to ensure customers understand what they offer and the relative merits of each. Provide a roadmap for cloud print management that aligns with the business's cloud strategy.

- **Focus on meaningful AI integration.** Incorporate AI-driven features to enhance automation, predictive analytics, and security, aligning with customer expectations and predicted investment focus.

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 15 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. The Global Print 2025 study provides unparalleled insight into the impact of digital disruption, from both an industry executive and end-user perspective.

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