Managed Print Services, 2025

How workplace automation, security, and sustainability are redefining managed print services

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Executive summary

Managed print services (MPS) continue to evolve as an enabler for workplace transformation, helping organisations modernise the print infrastructure to reduce costs, enhance security, and support the flexibility of a hybrid workforce. This strategic shift allows businesses to offload the burden of managing and maintaining a complex printer fleet, freeing up IT resources to focus on core business initiatives and enabling a more efficient, agile, and sustainable operational model. Increasingly, MPS is transitioning from its role as a device fleet management tool to one that embraces information security and management to provide enhanced business value.

MPS is considered a strong enabler for digital transformation

MPS serves as the critical bridge between an organisation's continued reliance on print and its growing digital transformation initiatives. This is a fundamental concept, as businesses are not abandoning paper but increasingly treating it as a dynamic part of their digital workflows. Quocirca's MPS 2025 study reveals that almost 60% of organisations believe printing will be very important to their business in 2026. Alongside this, 66% of IT decision-makers believe MPS will be very important to their digital transformation initiatives, rising to 74% in the US and 75% in the UK. Furthermore, scanning capabilities are now the single most important differentiator when organisations are selecting an MPS provider (very important for 50%), rising to 68% in the US and 61% in the business and professional services sector. This reflects the growing recognition of MPS as a key enabler for digitisation and a critical first step towards streamlining business processes and workflow automation.

Environmental impact is no longer the top print management challenge

Notably, the top print management challenge in 2025 is controlling costs (41%), rising to 46% in the UK. For organisations operating a mixed multi-vendor fleet, the top challenge is securing printing across a hybrid workforce (42%), compared to 32% for those operating a single-vendor fleet. This demonstrates that as fleet complexity increases, the primary concern shifts from financial control to mitigating the significant security and management challenges posed by a diverse, distributed environment.

A further key finding this year is that reducing environmental impact (32%) has dropped to a sixth-ranked concern, a significant change from its position as a joint first priority alongside controlling costs last year. While it remains a top challenge for businesses in the UK and France (37% and 39%, respectively), its importance has notably declined in Germany and the US to 26% for each region, for both of which security is now the top-ranked concern.

This reveals a critical shift in how businesses are prioritising their technology investments. While sustainability remains an important consideration, geopolitical uncertainties, among other factors, have led to it being eclipsed by more immediate, risk-focused drivers, such as cybersecurity, especially in major markets such as the US and Germany. Environmental benefits clearly must be communicated as a crucial component of a broader MPS solution that, first and foremost, addresses core business challenges related to device and information security, operational resilience, and cost control.

The top MPS drivers are service quality and security

The joint top drivers for managed print services (MPS) adoption are service quality and security, with 55% of organisations reporting these factors as very important. Reducing consumables costs comes third (52%). However, there is a notable gap between expectation and reality. When evaluating the effectiveness of their MPS, only 44% of respondents report it has been very effective in improving service quality, and just 41% say it has been effective in reducing consumables costs. The only area where perceived effectiveness comes close to expectations is security, at 50%. Meanwhile, a smaller number – just 39% – say their MPS has been effective in reducing environmental impact.

Clearly, a significant portion of the market believes their MPS is failing to meet these fundamental expectations. This gap in delivery, particularly regarding key business drivers, poses a threat to customer trust and loyalty. Overall, 42% of organisations are very satisfied with their MPS provider (down from 48% in 2024). Consequently, the majority (57%) are open to changing provider when their contracts come up for renewal. Around one in seven (15%) say that they will definitely change provider, dropping to 9% in France and rising to 21% in the US.

IT and cybersecurity expertise are paramount
Expertise in IT (32%), cybersecurity (32%), and workflow automation (25%) remain the top requirements in MPS selection criteria. US and German organisations are most likely to demand IT expertise (42% and 36%, respectively). UK organisations rate cybersecurity expertise the highest (37%), and French organisations place more importance on brand reputation (35%).

Organisations require an MPS partner that can embed services and solutions into their broader digital and IT transformation strategies. The heightened awareness of data protection, compliance risks, and a hybrid workplace that expands the attack surface means IT and cybersecurity expertise is critical alongside a proven track record of delivering MPS to support strategic business outcomes.

This report highlights the findings from Quocirca's primary research study, conducted in August 2025 across 400 organisations with over 250 employees using MPS in the UK, France, Germany, and the US.

The report also includes detailed profiles of the key MPS providers and their service offerings, as well as a vendor landscape of the market leaders and strong players, covering Brother, Canon, Epson, HP, Konica Minolta, Lexmark, Ricoh, Toshiba, and Xerox.

Key findings

- **The MPS market continues its evolution towards comprehensive workplace transformation.** Leading vendors that offer integrated print and capture platforms, with data-driven approaches to enhance security and lower environmental impact, are best positioned to support their customers on this journey. This report includes a detailed analysis of the leading and major players in the market. Based on Quocirca's 2025 assessment, Xerox, HP, Canon, Ricoh, and Konica Minolta have been identified as Leaders in the market, with Brother, Epson, and Toshiba identified as Major Players.

- **Environmental impact has been overtaken by cost reduction as the top print management challenge.** Controlling costs is the most widespread challenge in managing print infrastructures (41%), with print security not far behind (38%). The costs of on-premise print servers and educating users on how to ensure printed documents are handled securely rank third and fourth overall (37% and 35%, respectively). Reducing the environmental impact of printing has fallen from joint first place overall in 2024 to sixth in 2025, driven by the US (for which it was a top three challenge for 40% in 2024 but just 26% this year).

- **Integrating workflows, reducing print volumes, and improving security are top print technology priorities.** Better solutions to integrate print and scan workflows (28%), reduction of print volumes (26%), and security solutions (25%) are the top three print management priorities for the coming year overall, but this varies by region. French ITDMs are making the use of digital signatures their top priority, along with reducing print volumes (both 29%). Priorities have changed since 2024, with addressing security now more about fleet protection than document security, with reducing print volumes as a slightly greater focus in 2025. However, the proportion looking to eliminate print servers altogether has dropped slightly compared to a year ago (from 14% in 2024 to 10% in 2025), in spite of the fact 37% cite the cost of on-premise print servers as a key challenge.

- **MPS is increasingly a key enabler for digitisation.** The vast majority (89%) state that MPS is either very (43%) or fairly (46%) important to their digital transformation efforts, increasing to 94% (66% 'very important') within two years. Scanning capabilities have become the single most important differentiating feature for respondents when selecting an outsourced MPS provider. Half (50%) of organisations consider scanning capabilities 'very important', and a further 39% say it is 'fairly important'. This rises to 68% ('very important') in the US and 61% for business and professional services organisations.

- **Expectations of MPS providers are high.** MPS customers give high importance scores across a range of benefits, all of which have increased since 2024. The top expected benefits from adopting MPS are improved service quality and reliability, along with enhanced security (55% consider these 'very important', respectively). These are followed by reducing costs in terms of both consumables (52%) and hardware (50%), as well as achieving more predictable costs overall (49%). Improved business process efficiency is also key (49%).

- **Most plan to invest more in MPS to realise these benefits.** Overall, 71% of respondents expect investment in MPS to increase. This is highest in the UK (76%) and finance businesses (76%). Lower levels of increase are seen in France (63%), large organisations (66%), and business and professional services organisations and the public sector (68%, respectively).

- **IT and cybersecurity expertise are the top selection criteria for an MPS provider.** IT expertise (32%) and cybersecurity (32%) remain the top two areas buyers evaluate, but IT expertise has dropped from 42% in 2024. Workflow automation expertise has also dropped from 31% to 25%. Scanning/digitisation skillsets and AI expertise (not included in 2024's study) are now in fourth and fifth position, with 24% and 23% placing them in their top three, respectively.

- **Satisfaction with MPS providers has dropped slightly in the last year.** Just over two fifths (42%) report high levels of satisfaction with their MPS provider, compared to 48% in 2024. However, this does not translate into reduced loyalty. Only 15% in the 2025 study definitely plan to seek a new provider, and 42% may do so, compared to 26% and 39%, respectively, in 2024. Those in the UK and US appear most satisfied, which translates to greater loyalty (just 51% and 53%, respectively, considering switching), while those in Germany are most likely to seek a new provider (65%).

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Quocirca MPS vendor assessment

Quocirca's vendor assessment is based on a range of criteria that determine an overall score for market presence and completeness of offering. Each score is based 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.

Strategy criteria

- **Enterprise customers.** The strength of the vendor's global enterprise customer base.

- **Vision and 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, via either direct engagement or 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 criteria

- **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 and IT services.

- **Help-desk capabilities.** Centralised help-desk 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.

- **Workflow automation.** Capabilities and expertise for business process automation – both software solutions and business process services. This includes solutions to support document capture, routing, and integration with enterprise content management (ECM) systems.

- **Industry solutions.** Ability to offer industry software solutions in key vertical markets and industry alignment of the sales force.

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Figure 10 represents Quocirca's view of the competitive landscape for MPS vendors. Please see the Methodology section for details on vendor inclusion and exclusion criteria.

- **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, proven offerings and are continuing to develop their solutions service portfolio. These vendors tend to be primarily channel-centric in their go-to-market approach.
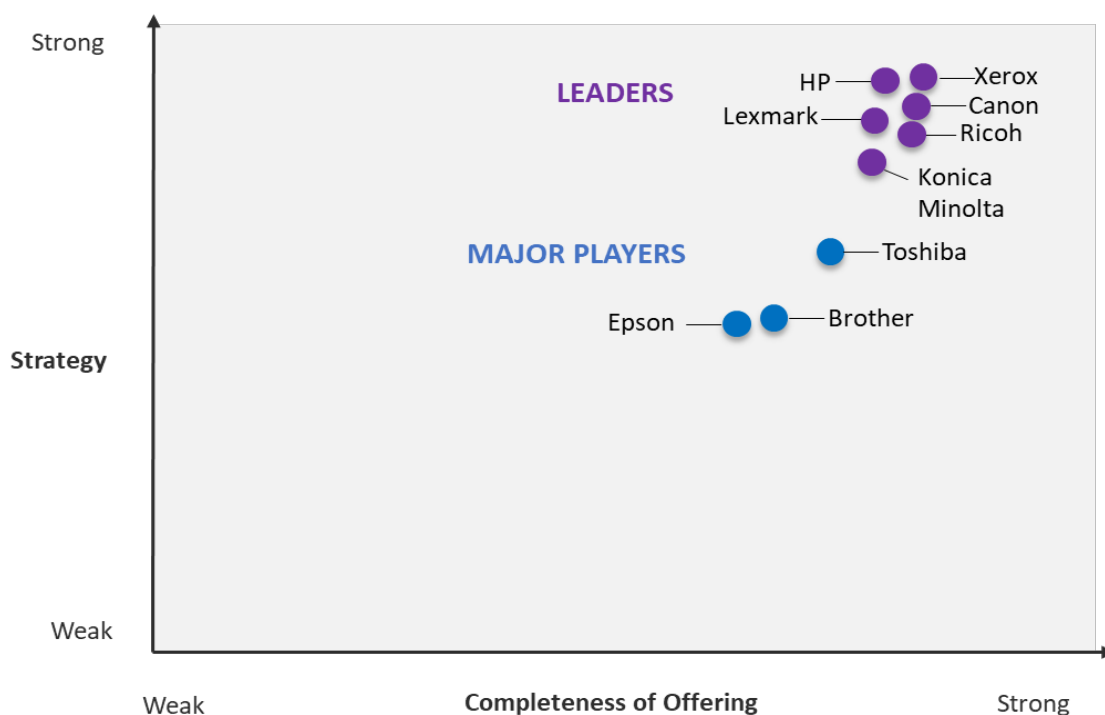

Figure 1. Quocirca MPS Vendor Landscape, 2025

The Quocirca Vendor Landscape is a graphical representation of Quocirca's opinion of the market and 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 reflect judgment at the time. All opinions are subject to change.

Vendor profile: Xerox

Quocirca opinion

Xerox has maintained its leadership position in Quocirca's 2025 assessment of the MPS market. The acquisition of Lexmark provides an opportunity for further expansion of its MPS strategy and supports its ambition to offer customers a more comprehensive device choice under a unified MPS platform. Xerox is currently reviewing and merging best-of-breed solutions and services from both legacy organisations to further improve its capabilities and processes.

Lexmark's global channel ecosystem complements Xerox's direct, partner-led model, particularly in EMEA and APAC. In addition, Lexmark's robust A4 and A3 printer/MFP lineup will extend Xerox's existing product portfolio and enhance its ability to meet a broader range of customer needs, especially in SMB and vertical-specific markets. Lexmark's established strength in A4 devices in particular will broaden Xerox's addressable market.

MPS strategy
Xerox's MPS combines advanced technologies with deep expertise in cloud, analytics, AI/machine learning (ML), workflow automation, sustainability, and zero-trust security. Its MPS strategy is centred on AI-powered analytics, AI/AR-enabled service delivery and cloud-first platforms. Notably, investments in digital and IT solutions capabilities and acquisitions in IT (e.g., ITSavvy and Lexmark) mean Xerox is well-positioned to address ongoing market shifts and become more agile.

Over the past year, Xerox has advanced its MPS strategy in response to evolving market dynamics, including declining print volumes, growing demand for cloud-native infrastructure, and heightened security expectations. It has further invested in partner-led MPS delivery, including tooling, licensing models, and support infrastructure, to bring the strength of its enterprise MPS to SMB and midmarket customers served by partners and Xerox Business Solutions (XBS).

Xerox delivers a consistent global service experience, supported by the same MPS toolset across all regions, including APAC. Of note is its formal MPS Multi-Channel Support Process, which enables seamless collaboration on MPS delivery for international customers between Xerox and partners or between partners. The MPS Multi-Channel Support Process provides global customers with the backing of Xerox's global support architecture combined with partners' local knowledge and presence. This offers customers a single service focal point, aggregated reporting, reduced on-site technology, and a consistent client experience across the globe.

Intelligence and automation built in
While AI has long been embedded in its services, recent advances in generative AI have further accelerated Xerox's development roadmap, ensuring that intelligence and automation are built into every element of its MPS portfolio, which is a key differentiator. For example, investments in AI, ML, and robotic process automation (RPA) enhance analytics, service delivery, and user productivity. Tools such as the Predictive AI Dashboard and Quick Resolve App provide proactive alerts, intelligent recommendations, and data-driven insights to maximise uptime and efficiency. In addition, AltaLink and VersaLink MFPs use AI to simplify repetitive tasks. When a user performs a multi-step job, the device learns the workflow and offers to save it as a one-touch shortcut. AltaLink devices also feature three AI-powered apps that streamline daily tasks such as summarising documents, converting handwritten notes into shareable digital files, and automatically redacting sensitive information.

Xerox also provides extensive self-service capabilities to empower end users and reduce IT burden. These include intuitive mobile apps, interactive MFP interfaces, and cloud-based portals such as MPS Advanced Analytics and the Fleet Management Portal. These tools drive faster resolution, enhance uptime, and improve the user experience.

Cloud-first approach
Xerox's cloud-first approach enables direct-to-cloud printer connectivity, centralised fleet management, zero trust-based print security, and productivity apps. Xerox's secure, cloud-first architecture enables it to deliver services remotely with zero IT footprint, enabling flexible deployment across office, remote, and hybrid environments. By integrating AI, intelligent document processing (IDP), and advanced analytics, Xerox helps customers reduce costs, improve agility, and achieve sustainability goals.

Xerox has continued to scale its Workplace Cloud Platform as the foundation for cloud-first MPS delivery. Workplace Cloud Direct enables VersaLink and AltaLink devices to connect directly to the cloud, eliminating on-premise infrastructure. Notably, Lexmark-branded eSF devices are also supported by Workplace Cloud in the same manner as Xerox devices.

Xerox has also introduced its Verified Carbon Neutral MPS service, which is aligned with ISO 14068 and independently certified. In addition, lifecycle emissions data and sustainability benchmarking have been integrated into MPS Advanced Analytics to support customer ESG reporting requirements.

These changes reflect Xerox's continued commitment to delivering globally consistent/locally adaptable services through a services-led, software-enabled approach.

Service offerings

Xerox Workplace Cloud & Suite
Xerox Workplace Cloud is an all-in-one platform designed to simplify and secure the print environment. It combines security, mobility, and cost control in a single, powerful solution – and by December 2025, it will expand to include integrated cloud scanning.

With Xerox Workplace Cloud, organisations gain a unified platform for:

- Device authentication
- Fleet and security management
- Print management and cost control
- Secure mobile workflows
- Integrated cloud scanning (new in December 2025)

This multi-tenant platform is ideal for organisations seeking to reduce local IT infrastructure or manage print fleets across multiple locations and networks.

For customers with specific data control or hosting requirements, Xerox Workplace Suite offers the same robust print management and mobility capabilities in a privately hosted deployment – giving organisations the flexibility to meet their security and compliance needs.

Features include:

- **Integrated Cloud Scanning (available December 2025).** The platform now includes seamless scanning integration with leading cloud repositories. Clients can easily deploy Scan to Google Drive and Scan to OneDrive from a single administrative console. This centralised approach simplifies setup, licensing, and ongoing device management – saving administrators' time.

- **Single Sign-On (SSO) for 35+ Xerox App Gallery Apps.** With the Xerox Workplace Cloud authentication vault, users enjoy a streamlined login experience to the company's full range of workflow automation apps. Once authenticated or signed in at a device, users automatically gain access to all supported Xerox App Gallery SSO apps – eliminating repetitive login steps and improving workflow efficiency.

- **Workplace Mobile App.** Provides cloud print and printer unlock capability, but when logged in as an admin, it provides simple device onboarding to the cloud platform. With a tap of a phone, a ConnectKey printer can be brought into a cloud account and then managed centrally from the cloud portal.

- **Embedded Release app.** Available for both Lexmark eSF-branded printers and Xerox ConnectKey-branded devices, the app enables end users to edit and securely release jobs at the printer user panel during a logged-in session.

- **Workplace Cloud Direct.** Supported on all current VersaLink and AltaLink devices, this feature integrates with Xerox's cloud to deliver a true serverless infrastructure. MFPs can connect directly to the cloud service with no agents or on-premise middleware.

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- **Print Queue Conductor.** Allows IT teams to automate driver deployment for Xerox and non-Xerox print devices from a single cloud portal. Queue conductor can detect the user's location and automatically push the right driver to their PC (in the background).

- **Remote Monitoring.** Proactive break-fix, supplies replenishment, and metre reads.

- **Printer Security Audit Service.** Monitoring of passwords, configuration, and firmware; remediating violators to policies.

- **Home Worker Print Tracker.** Counts print usage and provides content security for jobs submitted from a corporate laptop to any brand of printer in a home office.

Advanced analytics

MPS Advanced Analytics provides clients with self-serve, always-on insight into the global printer fleet, users, documents, and security via a single pane of glass. Architected on Microsoft BI, the web-based tool is organised into modules including fleet health, asset metrics, operational volume, user analytics, service history, security, sustainability, and budget analytics. User and security analytics require additional passwords for data privacy.

Analytics also identify high-volume scan-to-email activity, enabling Xerox to streamline and automate the process with ConnectKey Apps. In addition, Benchmark Analytics capability delivers deeper visibility into printing ecosystems, modelling sustainability performance across key metrics such as duplex usage, scanning rates, network scan volumes, connected device ratios, and remote resolution percentages. Drawing on the world's largest MPS database, Xerox Services Manager, customers can measure results, benchmark against industry peers or fleet size, and use the 'what-if' modelling feature to visualise the environmental and productivity benefits of improving performance against current baselines.

The Xerox Renewal Advisor tool applies predictive analytics to determine whether devices should be redeployed, renewed, or retired, while the Rapid Assessment Tool helps optimise fleet composition for cost, productivity, and sustainability.

Security solutions and services

Print security is a key tenet within Xerox MPS engagements. Xerox solutions support zero-trust architecture (ZTA). Its layered approach spans devices, data, documents, and users – with continuous monitoring, policy enforcement, and proactive remediation visualised through dynamic dashboards and SIEM integration. To extend protection further, Xerox has introduced a Printer Security Operations Center (PSOC) that combines automated remediation with expert monitoring.

Workflow and business process automation

Xerox offers a range of digital transformation capabilities, from simple device-based apps to full-scale process automation and enterprise content management systems. These solutions automate document storage, extract critical data, and seamlessly integrate with downstream systems such as ERP and CRM platforms. For hybrid and remote workers, the same apps are available on VersaLink devices, ensuring consistency across work environments. Xerox's MPS ecosystem integrates directly with its workflow automation suite, including IDP through ConnectKey Apps, enabling organisations to capture unstructured documents, extract actionable insights, and embed them into critical business processes.

Xerox helps customers digitise and automate core processes such as customer onboarding, accounts payable, and employee communications through RPA, AI, and analytics. ConnectKey apps, Xerox Workflow Central, Digital Hub and Cloud Print Services, and Capture & Content Services leverage AI and IDP to digitise and streamline business processes.

Notably, Xerox solutions support home, office, and mobile environments. Customers can securely print, digitise, and share information; initiate automated workflows; and collaborate across geographies. With the acquisition of ITSavvy, Xerox is expanding its IT solutions portfolio, positioning itself to address broader digital transformation and infrastructure needs across SMB and enterprise clients.

Sustainability-focused services

Xerox offers a comprehensive suite of sustainability-focused services, including cloud platforms with lower energy use, analytics to identify high-impact print behaviours, tools to reduce or offset consumption, and its ISO

14068-certified Verified Carbon Neutrality Service. In addition, Lifecycle Carbon Emissions Analytics provide clients with actionable Scope 3 reporting.

Xerox App Gallery and ConnectKey Apps
These tools help businesses streamline workflows, secure documents, enable mobile printing, and integrate with popular cloud repositories such as Microsoft 365, Google Drive, Box, and Dropbox. Apps cover everyday needs, from translating and redacting documents to summarising content or converting handwritten notes, along with industry-specific solutions for education, healthcare and legal.

Xerox Workflow Central
This cloud-hosted platform automates document conversion with workflows such as translation, redaction summarisation, audio conversion, and secure PDF creation. Users can also combine tasks (e.g., translate and redact in one step) and automate recurring processes by monitoring email inboxes or cloud folders. With unlimited users and devices under one subscription, Workflow Central delivers simple, scalable, and secure automation for the hybrid workplace.

MPS Asset Management
MPS Asset Management provides accurate, end-to-end lifecycle management for physical assets (Xerox and non-Xerox) across a client's locations, even those that are not under an MPS contract.

CareAR
The CareAR remote assist/remote call resolution tool provides live visual guidance for remotely seeing and solving issues anywhere, helping achieve faster time to resolution, higher first-time fix rates, improved knowledge transfer among field engineers, enhanced service and downtime reduction, and improved customer experience.

Strengths and opportunities

Strengths

- **Consistent global service experience.** Xerox delivers a consistent global service experience, supported by the same MPS toolset across all regions, including APAC.

- **EU hosting for MPS tools.** To help address data sovereignty concerns, Xerox now offers EU hosting for its range of MPS Tools including MPS Advanced Analytics and XSM.

- **Comprehensive security approach.** Bolstered by advanced features from the ConnectKey ecosystem, in collaboration with Trellix and Cisco, Xerox's comprehensive security approach safeguards data and devices from intrusions and unauthorised changes. Security services are available through Xerox fleet management tools, print management tools, and analytics. By the end of 2025, Xerox will its Certificate Management Service and Printer Security Audit Service to Lexmark-branded devices as well as Xerox branded devices.

- **Adjacent services.** Xerox Capture and Content Services; workflow automation services including IDP and customer engagement services, e.g., centralised production print services; and communications campaign management can be added to an MPS engagement to boost productivity and resilience.

- **Advanced analytics.** Xerox has a mature analytics offering to help MPS clients gain deeper insight into their print and scan infrastructure. Analytics that leverage AI also deliver predictive support, supplies, and maintenance, reducing downtime and wasted part replacement. In addition, Xerox uses analytics in its MPS offering to monitor and manage printer fleet security. Xerox has also extended its MPS advanced solutions including analytics to Lexmark devices.

Opportunities

- **Lexmark integration.** Lexmark's robust A4 and A3 printer/MFP lineup complements Xerox's existing product portfolio and enhances its ability to meet a broader range of customer needs, especially in SMB and vertical-specific markets.

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Vendor profile: Lexmark

Quocirca opinion

Lexmark has maintained its leadership position in Quocirca's 2025 assessment of the MPS market. The completion of the Xerox acquisition of Lexmark in mid-2025 created a new powerhouse in the print industry, combining the companies' global reach to serve over 200,000 clients in more than 170 countries. The merger is designed to leverage Lexmark's core strengths, including its Global IoT infrastructure, end-to-end technology ownership, and fully cloud-enabled MPS platform. Lexmark's recent strategic moves to integrate AI, predictive analytics, and enhanced security are particularly noteworthy as they align with the needs of a hybrid workforce. For customers, the opportunity to benefit from a broader, more integrated portfolio and a larger, unified service network is a strong positive. However, as the companies undergo integration throughout 2026, customers will need to monitor how Lexmark's distinct leadership position and innovative portfolio are maintained and further enhanced within the new, combined organisation.

Lexmark particularly stands out for its Global IoT infrastructure, which provides MPS customers with visibility and consistency in reporting across device fleets worldwide. The Global IoT System enables Lexmark to deliver consistent, scalable services across geographies, eliminating IT burden and enabling digital transformation. In addition, end-to-end technology ownership is a key differentiator. A consistent technology platform across all devices enables uniform support, simplified serviceability, and enhanced lifecycle management.

Over the past year, Lexmark has expanded and refined its MPS strategy to align with evolving customer needs, technological advancements, and market dynamics. In particular, it has moved to a fully cloud-enabled MPS infrastructure, anchored by its Global IoT System and Cloud Fleet Management (CFM) platform, which provide centralised, cloud-native control over device fleets. This infrastructure supports remote diagnostics, firmware updates, and security compliance without requiring on-site IT intervention. In January 2025, it launched the Lexmark Cloud Solution Center (CSC), consolidating services such as Cloud Print Management (CPM) and Cloud Scan Center into one unified, AI-powered platform.

The Lexmark Cloud Services platform eliminates the need for on-premises infrastructure and enables remote diagnostics, print release, and configuration management. This is particularly relevant as a hybrid workforce requires scalable, secure, and flexible print solutions. The Lexmark Global IoT System plays a central role in this strategy, offering predictive support and real-time analytics across a unified device ecosystem. This system is optimised for managing the lifecycle of output assets and designed to reduce IT burden while enhancing uptime.

Lexmark uses data along with digital-twin technology to power sophisticated algorithms that ensure system uptime and availability. This is a key area of differentiation. Also of note is Lexmark's Smart Refresh programme, which uses data analytics to determine when devices are truly at the end of their useful life, reducing unnecessary replacements and enhancing sustainability. In addition, predictive services leverage artificial intelligence (AI) and IoT to anticipate failures, automate consumables management, and reduce downtime.

Lexmark's MPS offerings include ISO 27001- and ISO 20243-certified devices, Cloud Fleet Security Dashboards for automated vulnerability detection and remediation, and configuration and security services that align with zero-trust principles.

Lexmark has also continued to advance its use of analytics for MPS, including Smart Refresh. By leveraging interactive analytics, Lexmark helps customers identify inefficiencies, automate workflows, and make data-driven decisions that enhance business outcomes. Lexmark also customises solutions to specific business needs, such as custom supply replenishment algorithms and predictive maintenance models. Notably, these innovations are built from real-world usage data and refined in partnership with customers.

Lexmark and Xerox confirm that as of the second half of 2025, the complex work to integrate the global companies is underway. The combined company's offerings will harmonise under a single Xerox brand over time; the Lexmark brand will continue to be marketed and sold under the Xerox umbrella for a period still to be determined. Lexmark has stated that current client agreements will remain in full effect, with no changes to the terms, conditions, or service agreements, or to the way the company does business with clients.

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Service offerings

Global IoT System
The Lexmark Global IoT System is a key differentiator for its MPS offering; rather than multiple systems to track billing or service or systems split by geography, this single system provides complete visibility in one location. Through IoT sensors that monitor hundreds of data points across each device, Lexmark can identify issues, inconsistencies, waste, security risks, and usage trends for insight that drives continuous business improvement.

AI and machine learning (ML)
AI is a cornerstone of Lexmark's MPS evolution. It has integrated AI and ML across its MPS offerings. Leveraging digital-twin technology and AI, Lexmark anticipates maintenance needs and prevents failures before they occur to increase uptime. Algorithms autonomously adjust engine settings, update firmware, or guide users through issue resolution via device front panels, minimising human intervention, and AI/ML algorithms predict toner depletion based on actual usage patterns, ensuring proactive supply replenishment.

Security services
Lexmark's security services are designed to adapt to evolving threats, ensuring that customer environments remain resilient and compliant. Its security services offering is based on a secure-by-design approach built around four pillars – products, services, standards, and solutions. Key security services include:

- **Security Assessments.** Lexmark conducts in-depth evaluations of firmware, device settings, and user permissions to identify vulnerabilities and recommend improvements. Customers can discover security concerns across their printing and scanning fleets with regularly scheduled assessments to detect and report on the risks associated with these devices.

- **Configuration Management.** Lexmark actively manages device settings and firmware to maintain compliance with customer-defined security policies.

- **Cloud Fleet Security Dashboards.** Automate the detection and remediation of known vulnerabilities across enrolled devices, supporting a zero-trust architecture.

Analytics
Lexmark's Process Analytics uses over 150 metrics and advanced data mining to benchmark usage against industry peers, identify outliers and usage trends, and support deployment planning and fleet optimisation. Its Fleet Performance Analytics service evaluates device usage, age, and service history to generate actionable recommendations, including smart replacement calendars to extend the life of high-performing devices, identifying root causes that affect fleet performance and providing visibility into key metrics that drive operational improvement.

Sustainability-centric MPS
Lexmark has implemented interactive analytics within the Lexmark Cartridge Collection Program (LCCP), meaning a single cartridge returned to an LCCP hub from nearly 50 countries around the world can be easily tracked beyond the site level. When a cartridge serial number is scanned, it will link back to the serial number of the printer it came from and the customer account to which the printer is assigned. Reports are available on the MPS data analytics site, enabling customers to view more detailed, global reports of their sustainability efforts.

Lexmark Cloud Services Platform
The Lexmark Cloud Services Platform encompasses output management solutions, workflow automation tools, remote service capabilities, and data collection. Lexmark Cloud Fleet Management is a cloud-based Lexmark device management solution that makes it easy to configure printers, gather vital statistics, and keep devices up to date with the latest recommended firmware, device settings, permissions, and apps. Lexmark Cloud Print Management (CPM) is a true SaaS architecture that includes extensive real-time reporting, tracking, and analytics capabilities with very simple portal access. It also covers and tracks both PC and mobile printing applications.

Lexmark Cloud Solution Center

The Lexmark Cloud Solution Center streamlines workflows by delivering an intuitive way to capture, process, and route documents with the ease and security of the cloud. Automation functionality includes OCR, redaction, and translation into over 130 languages, all with the touch of a button.

Workflow automation

Lexmark is investing in workflow automation to streamline document-centric processes. This includes edge-based capture and routing, as well as custom solutions co-developed with customers. The vendor has also extended its MPS capabilities across document management, output control, and security through a global, robust network of alliances and ISV partnerships.

Markvision Enterprise

Markvision Enterprise (MVE) provides greater visibility into an entire fleet of network printers and multifunction devices. The advanced toolset makes it easier to configure device settings, update firmware, manage certificates, and update security policies while reducing the burden on IT staff.

MPS Express

MPS Express stops short of a fully customised enterprise MPS solution. The turnkey cloud-based solution provides tools to enable channel partners to create their own commercial package for SME customers. MPS Express with enhanced services expands the programme to work with larger system integrators, providing the same streamlined customer benefits but with day-to-day operations managed directly by Lexmark.

Strengths and opportunities

Strengths

- **Global IoT infrastructure.** Lexmark's Global IoT infrastructure is a key differentiator, providing MPS customers with visibility and consistency in reporting across worldwide device fleets. Ongoing investment in a single global system aims to improve operational execution within the Lexmark Global IoT System, providing customers with transparency and accuracy regarding fleet details.

- **End-to-end technology ownership.** Lexmark designs and controls its entire technology stack, from hardware and firmware to cloud platforms and support processes.

- **Big data analytics.** Services including Lexmark Predictive Service and MPS Process Analytics leverage big data analytics and its Global IoT system to address inefficient paper-based operations, streamlining processes to deliver value.

- **Robust security.** Lexmark is committed to advancing print security through continuous, targeted updates and industry-focused innovation. It continues to invest in next-generation security frameworks, which include secure elements for encryption key generation and self-encrypting hard drives.

- **Supporting a hybrid workforce.** Lexmark offers secure, right-sized MPS solutions through options such as its Cloud Bridge technology (enabling native IoT connectivity), custom supply portals, Cloud Print Management, and VPN connections to support a hybrid workforce.

- **Partnership with Xerox.** The post-merger combination of Xerox and Lexmark should provide customers of both companies with an even richer MPS offering than they have had to date, not that either offering has been lacking.

Opportunities

- **Partnership with Xerox.** Following the merger, Xerox and Lexmark need to work to ensure that the customers of both sides see the benefits of the merger in terms of more feature-rich solutions and better service delivery.

Recommendations

Supplier recommendations

- **Demonstrate a deep understanding of how the client's print environment sits within their overall print infrastructure and prioritise security holistically.** Remember that the security of the information being managed across an organisation's environment is what truly matters. Security considerations across hardware, firmware, software, cloud connections, and consumables must be addressed to ensure such information security. Providers that can offer expert security advice will stand out, especially if they can encompass security considerations across the full IT estate. Suppliers that continually invest in advanced threat detection and prevention technologies to protect clients from cyberattacks will stand out and assuage concerns. Provide a full suite of security services, including threat detection, incident response, and compliance management across the managed fleet. Continuous monitoring of the printer fleet should be a standard offering in enterprise MPS, as well as helping clients meet regulatory compliance requirements. Conduct regular security assessments to identify vulnerabilities and recommend mitigation strategies. Assessments are key, and vendors should offer scalable security fleet assessments to uncover security risks across multi-vendor fleets. This creates opportunities for MPS providers to recommend not only the latest hardware with advanced security, but also secure printing solutions to mitigate security risks.

- **Position MPS as an enabler for transformative services that are linked to cost savings and business outcomes.** MPS remains an effective platform to help businesses innovate and drive digital transformation. In some cases, increasing concern about cost and perceptions of poor visibility into those costs can be mitigated by highlighting the broader economic benefits offered by digitisation, along with dashboards that present cost savings directly to the business. Transformational services that help customers future-proof their businesses include the use of cloud-based services across print and capture, as well as upgrading hardware for improved environmental performance and enhanced security, while ensuring printer fleets are easily managed across a hybrid work environment.

- **Offer a clear pathway to digital workflow automation.** Workflow automation is a key area for MPS providers to add value. Automated processes can lead to cost savings by reducing paper consumption, eliminating manual tasks, and improving resource use. Workflow automation can improve straight-through processing (STP) of information and remove errors introduced through human interventions in such processes. Providers that can effectively identify and implement workflow automation solutions as part of a broader MPS engagement are best positioned to demonstrate how MPS is an enabler for digital innovation and not simply limited to the print environment.

- **Integrate sustainability more strongly into the MPS value proposition, for European customers in particular.** MPS providers must offer sustainable technology solutions that align with customers' environmental goals. Print fleet performance data and analytics can help customers understand where they should make changes and reduce their carbon footprint. MPS providers that can demonstrate sustainable practices across their own business and showcase circularity across the product lifecycle will be best positioned to build competitive advantage. Even beyond Europe, geopolitical actions can change rapidly. Ensuring an overall print environment is flexibly future-proofed for sustainability allows organisations to track the changing legal landscapes within their regions.

- **Form strategic partnerships to enhance credibility.** Strategic partnerships with complementary technology providers will allow MPS providers to expand their service offerings. Along with a range of other commercial benefits, strategic partnerships can help MPS providers mitigate risks by sharing responsibilities and diversifying revenue streams. With IT services and cybersecurity expertise as top selection factors, MPS providers that do not already have service offerings in this space should evaluate complementary MSPs to offer a more comprehensive solution. Workflow automation and AI are also areas where strategic partnerships can prove highly beneficial in terms of capability, flexibility, and speed to market.

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Buyer recommendations

Buyers must evaluate MPS providers for their ability to deliver secure, innovative services that support the full digital transformation journey across print and digital workflows and provide consistent services and visibility across all working locations.

- **Select providers that prioritise cybersecurity.** Aside from the standard evaluation of MPS providers to ensure they conform with security certifications and accreditations, check that they can clearly articulate their approach to protecting devices from compromise to guarantee document, network, and user security. Evaluate cloud security models and gain clarity on identity access management integration with secure printing and capture solutions. Ask providers about their approach to security posture assessments and security incident management in the event of a print-related data compromise. Also, check on the overall end-to-end information security capabilities of any solution. Remember, the information held within your organisation is the intellectual property on which its value is based.

- **Ensure that any MPS contract supports devices across working environments.** MPS must enable businesses to effectively manage and control their print activities across all employees and locations. Look for providers that can advise on and deliver home-office device provision, monitor usage and security patterns, and offer solutions that deliver closer collaboration between the home and office environments, including secure print management alongside consumables replenishment services. Incorporating devices into MPS contracts rather than allowing them to be bought individually mitigates security risks caused by unmanaged devices that are purchased transactionally. Also, check for capabilities in other remote environments, such as hotels, airports, and cafes, where employees are likely to need to work with sensitive documents. Finally, ensure that not only direct employees, but also contractors, consultants, and any other external stakeholders can be included within the print environment in a granular and secure manner.

- **Evaluate modularity and flexible subscription service offerings and ask about cost visibility.** MPS offerings vary considerably, especially for smaller organisations that will benefit from flexible subscriptions in which MPS providers can offer tailored solutions that align with customer needs. Look for flexible subscriptions that can adapt as requirements evolve. For instance, a basic MPS may be suitable for SMBs, but it should also be able to incorporate cloud-based workflow solutions, digitisation, application integrations, and other services that may be required as the organisation grows.

- **Create a roadmap for workflow automation to support broader digital strategies.** Select MPS providers that can demonstrate a coherent roadmap for digitisation that incorporates information management and workflow automation. MPS providers are well-positioned to bridge the gap between print and digital, providing effective support in this area. Consider standardising on MFP hardware to gain the benefits of proprietary and integrated hardware, alongside specialised software, in the information management space.

- **Leverage analytics data to deliver continuous improvement.** Ensure that the MPS provider delivers deep insight into device usage across a printer fleet and uncovers valuable information to identify opportunities for improved automation and the minimising of manual paper-based processes.

Licensed to Xerox and Lexmark

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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 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. Quocirca now also provides vendor landscape reports for Cloud Print Services, AI and Sustainability.

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