

IDC MarketScape: Worldwide Print Management Solutions Independent Software 2021 Vendor Assessment

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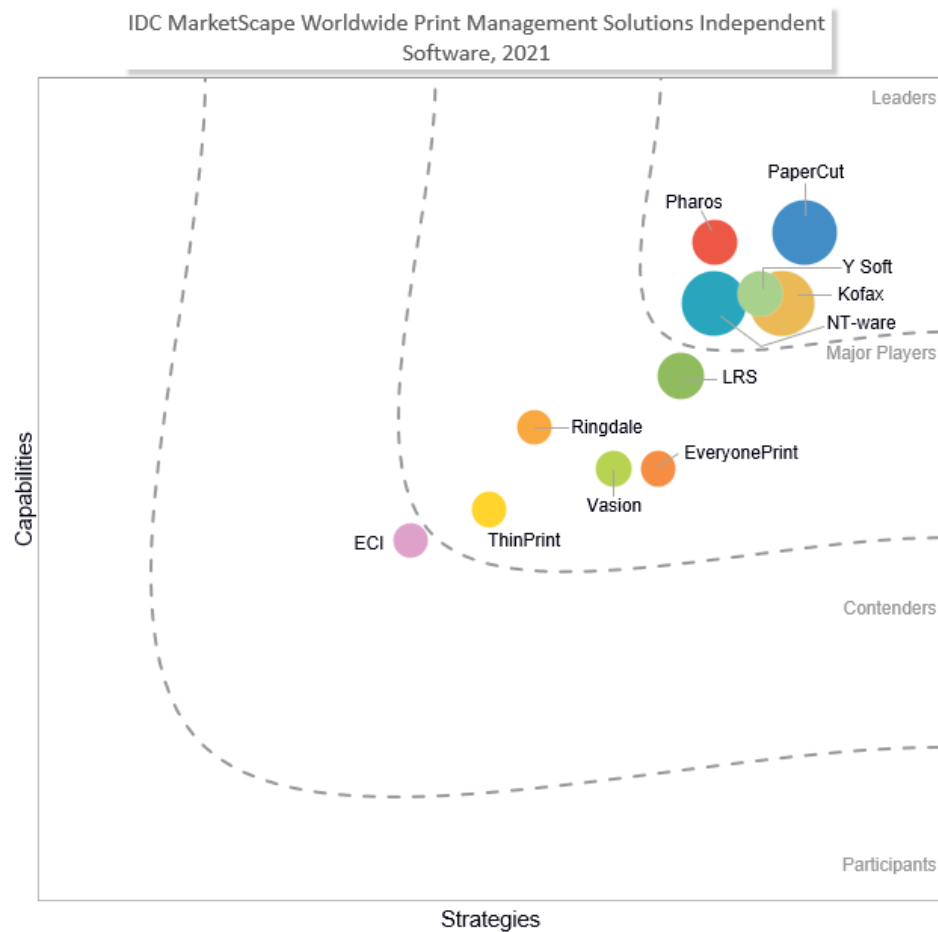
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IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Print Management Solutions Independent Software Vendor Assessment



Source: IDC, 2021

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Print Management Solutions Independent Software 2021 Vendor Assessment (Doc # US47348521). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study assesses the market for print management solutions among select independent software vendors through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that position vendors for success in this important market. This IDC MarketScape covers a variety of software vendors and is based on a comprehensive framework to evaluate print management solutions. Organizations using the IDC MarketScape for print management solutions can identify vendors with strong offerings and well-integrated business strategies aimed to keep the vendors viable and competitive over the long run. Capabilities and strategy success factors identified from this study include:

- Current solutions portfolio with product-specific services and features to address a wide-ranging print landscape
- Road map to address specific customer challenges related to print infrastructure
- Capabilities and strategies to help customers achieve an optimal secure print environment
- A holistic approach to delivering horizontal and vertical print management solutions through direct and partner-led engagements
- Continued expansion into new geographic territories, vertical industries, and line-of-business applications
- Flexible service and solution development and delivery, pricing, and billing models and the ability to support on premises and private and public cloud

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This document includes an analysis of 11 prominent print management independent software vendors with wide-ranging extensive product portfolios to specifically address printing environments on a global scale. Vendors must offer a solid portfolio of print management solutions and meet given revenue criteria of \$8+ million annually. Given this approach, certain independent software vendors have been excluded based on worldwide revenue. Also excluded from the study were indirect channel partners and hardcopy equipment manufacturers.

ADVICE FOR TECHNOLOGY BUYERS

Print management, across an enterprise, can be an enormous challenge as pressure to optimize print device usage, control costs, and provide security remains an operational priority. For most companies,

print is decidedly regarded as a burden rather than a key component of the corporate infrastructure; however, when print is interrupted, it becomes essential.

COVID-19 presented many challenges to organization's IT, and with print specifically. Businesses grappled with a rise in remote and home workers who were prevented access to business processes, applications, and common business tools, such as print. As the pandemic persisted, it resulted in demand for more digital tools to target the home and remote worker. While office printing declined, home and remote printing surged, as such, end users now expect access to business processes, applications, and tools from anywhere, at any time.

Organizations now seek to embrace technology such as cloud to deliver solutions quickly and seamlessly. Print management solutions must now provision for devices in the office, branch office, and home office. Coupled with a mounting need to provide secure continuous access to information and tools that drive productivity and efficiency, organizations are looking for flexibility and scalability in solutions offerings. Direct alignment of print solutions with business needs provides for flexible pricing models, modular offerings available on a subscription basis, and services to deploy and integrate.

Accordingly, organizations should ask the following questions when considering print management software:

- What core needs exist, companywide, when it comes to print management: cost savings, better print job control, improved visibility into device usage, reduction in IT burden, and easy access to users for print?
- How is the hybrid working model changing the printing landscape? Do we have a need to now track home printing?
- What will the key metrics be for successful print management: reduction in overall print devices, supply cost reduction of ink and toner, improved worker productivity, enhanced document security, and companywide print activity tracking?
- How will the print management solution address industry-specific considerations?
- Can organizations start small and scale up with users, devices, features, and services?
- What is the typical length of time for installation and deployment?
- What considerations need to be made with displacing an existing print management solution?
- What is the cost of a print management solution and what are the available billing methods – pay per user, pay per device, pay per print, and enterprisewide licensing?
- How will upgrades, updates, service, and maintenance be handled?
- What type of internal IT support will the print management solution require?
- What types of deployment options are available: on premises, cloud, and hybrid?

This IDC MarketScape evaluates independent software vendors and helps answer these questions and others. The purpose of the IDC MarketScape is to provide enterprises with the ability to identify vendors with strong offerings and well-integrated strategies.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

PaperCut

PaperCut is positioned in the Leaders category in the 2021 IDC MarketScape for worldwide print management solutions independent software.

PaperCut Software Pty Ltd. was founded in 1998 and is headquartered in Melbourne, Australia.

PaperCut is a print management solution provider, with a genesis tracing back to the environmental impact of print. PaperCut engages with organizations looking to gain control over their print landscape, helping identify specific needs and providing solutions designed to create an impact. PaperCut's approach to the print management market, initially, was to reduce and remove paper waste, however, has evolved to "crafting better environments" with print management. A self-proclaimed culture of values and people, the company is led by the original founders of the company.

PaperCut offers and delivers print management solutions for market sectors ranging from small to large enterprises. PaperCut's self-hosted print management solutions can be implemented and managed within an organization. Companies frequently have variable levels of complexity and confidence within their IT group; in this case, PaperCut contends that a self-hosted model may prove appropriate. Self-hosted models can be on premises, hybrid cloud, or private cloud with diverse feature sets, licensing options, upgrades, and support structures. An example is PaperCut's NG product; it will track, manage, and charge for printing and can be implemented and hosted by the customer directly. These varied solution offerings look to allow choice in organizations print management decisions.

PaperCut MF, also self-hosted, is the subsequent solution with added features such as secure print release and data loss prevention. PaperCut understands that the MFP acts as a hub for not only print activity but also scan and workflow initiation. As a result, the company has embedded MFP software that allows for scan to cloud, scan to email/folder, image management (OCR/PDF/A Support), and scanning integrations. Beyond the features mentioned previously, PaperCut MF also has support for customization with Open APIs, print scripting, integration, and multiregions with language support.

PaperCut continues to expand its suite of solutions with two cloud-based solutions (public cloud or self-hosted): PaperCut Pocket and PaperCut Hive. With PaperCut Pocket, largely for small business, organizations can take advantage of secure print release with a mobile device, view and audit print activity logs, receive toner alerts, and have a level of device access and control. With PaperCut Hive, a more comprehensive feature set is available for cloud-ready organizations. PaperCut Hive can benefit customers with secure print and ID card job release. Further product features are planned that align with the PaperCut MF product category, such as enhanced print cost control, on-device scan to the cloud, scan to email, and expanded scanning integrations.

Leveraging and supporting its broad sales network, PaperCut has product offerings for the reseller channel designed to scale, as needed. These include low-touch and modestly featured products to sophisticated and cloud-based subscription offerings. To further support a wider print base, PaperCut offers free trials, no cost solutions, or freemium options. For quick customer adoption, PaperCut has solutions that can be downloaded and deployed for no cost or support needed. As Google announced it would no longer support cloud-based printing, Google Cloud Print, PaperCut Mobility Print can help customers fill the Google Cloud Print gap. PaperCut offers this solution free of charge to serve basic printing needs while providing the channel the opportunity to sell up in the print management value chain.

Strengths

PaperCut offers a full range of print management solutions to serve the diverse needs of its channel and the base it operates. PaperCut has designed a portfolio with various options from free/freemium to low-

cost subscription to on-premises, full featured print management. PaperCut engages the smallest of customers, often with free products, and exposes them to a large customers segment. According to PaperCut, the company is willing to disrupt the traditional way of thinking of print management solutions.

PaperCut's large reseller community, approximately 8,000 resellers, including OEM partnerships, gives PaperCut deep industry scope and reach. PaperCut provides continuous training for constant engagement and sales enablement.

PaperCut utilizes Edge Mesh technology to operate cloud-based PaperCut Pocket and PaperCut Hive. The network is designed to handle print jobs and discovery of new print devices. Nodes (workstations) are activated within a customer environment, eliminating the need for print servers. They then work together to create a web that acts like traditional print servers.

Challenges

IDC believes that PaperCut could expand and extend its traditional partner channel to include IT providers. A deep reliance on the traditional office equipment channel and a rapidly changing landscape produce risk in the print management space.

Consider PaperCut When

Consider PaperCut if you are a small company with limited budget for print management and no or low IT support. Conversely, larger organizations with a diverse set of print management needs should also consider PaperCut.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here, and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately

vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

For the purposes of the 2021 IDC MarketScape for worldwide print management solutions, IDC defines print management as "tools that are software based for tracking, measuring, monitoring, reporting, and managing end-user behavior and the printed output produced by office imaging equipment deployed as part of a networked fleet of devices. Functionality includes, but is not limited to, rules-based printing, secure print release, and job auditing and accounting."

In addition, this segment includes mobile printing solutions that deliver print jobs from a mobile touch point (smartphones or tablets) to an output device using cloud (external) or an internally hosted server. These tools include both secure enterprise (behind the firewall) deployments and public (cloud) printing solutions. Direct peer-to-peer print or direct wireless print is excluded. Pages are tracked in the same manner as if jobs were initiated from a PC or laptop (and may be managed by the toolset previously described).

LEARN MORE

Related Research

- *Market Analysis Perspective: Worldwide and U.S. Document Solutions, 2021*(IDC #US47100721, September 2021)
- *Worldwide and U.S. Device and Print Management Market Shares, 2020: Revenue Down as COVID-19 Closes Offices, Accelerates Digital Transformation* (IDC #US46357321, June 2021)
- *Worldwide and U.S. Document Solutions Software Forecast, 2021-2025* (IDC #US46357221, June 2021)
- *IDC PlanScape: Print and Document Management Vision* (IDC #US46357621, February 2021)
- *Managing Print Security for the Hybrid Workforce* (IDC #US47100920, December 2020)
- *IDC MaturityScape Benchmark: Print and Document Management 3.0 in the United States, 2021* (IDC #US45912520, December 2020)
- *IDC FutureScape: Worldwide Imaging, Printing, and Document Solutions and 3D Printing 2021 Predictions* (IDC #US46910220, October 2020)

Synopsis

This IDC study assesses the market for print management software solutions among the most prominent global independent software vendors and identifies their strengths and challenges. This assessment discusses both quantitative and qualitative characteristics that position vendors for success in this important market. This IDC study is based on a comprehensive framework to evaluate print management delivered within the context of an engagement.

"Print management buyers should ensure that the print management solution is aligned with the goals and objectives of the organization. Remote and hybrid work has transformed the technology landscape, and vendors need to provide secure solutions to support these new working conditions," says Anne Valaitis, research manager, IDC's Imaging, Printing, and Document Solutions group.

"Organizations have to reassess their print management capabilities and think critically as SaaS and cloud-based solutions look to transform the traditional print management landscape."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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