

# Cloud Print Services Landscape, 2025

Navigating market fragmentation, hybrid realities, and evolving customer concerns



## 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.

## 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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# 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.



## Vendor profile: LRS

### Quocirca opinion

LRS Output Management is a division of Levi, Ray & Shoup, Inc. (LRS), a global provider of technology solutions. The company has more than four decades of experience in output management in the enterprise space. The company continues to develop and enhance its on-premise offerings and invest in LRS CloudPrint to better support the hybrid workplace environment, where printing originates from laptops, desktops, and mobile devices. Its product offering includes solutions that run on-premise, in a private cloud, as a managed service, or as a multi-tenant SaaS. LRS-hosted services and its SaaS offerings include LRS CloudPrint and LRS Mission Control, run in Microsoft Azure. LRS also continues to expand its managed services offering, which includes its full suite of products in a managed environment, minimising the IT administrative burden for its customers.

#### Scalable offerings for large enterprises

LRS solutions are designed to support large enterprise global customers with thousands of printers. The Personal Print Manager (PPM) feature is a critical component of LRS's print management offerings. PPM is the client software that runs on Windows, macOS, and Linux desktops. It supports a variety of end-user and administrative print management functions, such as self-service capabilities, policy printing, print driver management, direct IP printing, and find/add/delete printers.

LRS is strongly focused on offering its large enterprise clients flexible and scalable offerings. It continues to enhance its on-premise offerings, which include its flagship output management platform for the SAP environment. This offers centralised end-to-end visibility and management of print queues and solutions such as VPSX Enterprise and VPSX/OutputManager, which eliminate the need for print servers. It also offers healthcare printing via Cerner and Epic.

Its extensive vendor-agnostic print management solutions portfolio, encompassing print and scan, also enables customers to future-proof solutions for new requirements such as scan workflows and mobile, secure, and cloud printing.

#### Secure centralised print management for on-premise and cloud environments

LRS is also growing SaaS offerings in LRS Mission Control, a cloud-based tool that provides a central point of control for managing large print and output. It also offers a migration path both to and from the cloud, particularly addressing the needs among customers repatriating their cloud workloads back on-premise. LRS has addressed potential security concerns with multi-tenant services, designing LRS Mission Control to give each customer full control of their data.

In 2025, LRS is introducing new multi-tenant SaaS-based functionality to its LRS Mission Control cloud-based service. New offerings including Innovate/Audit Cloud, VPSX/DirectPrint Cloud, and MFPsecure/Print Cloud have feature parity with its on-premise solutions and notably provide customers with a seamless migration path to and from the cloud. In addition, LRS is a member of the Mopria Alliance and opening migration paths to allow customers to leverage Windows Protected Print mode, which eliminates traditional drivers entirely.

#### Support for label printers

LRS's core on-premise and private cloud offerings also support label printers such as Zebra and other compatible devices. Key features include printing to remote locations without the need for private networking or VPNs; push (guest) printing with an option to enable pull-printing, which requires the guest to enter an assigned code (sent via email) at the device; and delegate printing, which enables print job owners to assign other users the right to retrieve documents on their behalf. Optional products include a distributed data capture solution – users authenticate in the same way they do for pull-printing and can scan to, for example, email, home folder, and OneDrive – and Intelligent Document Bundling, which enables users to retrieve, sequence, format, and bundle/merge documents in different formats and from various source locations into a single output file for assured delivery to any print device.



## Product overview

### VPSX

VPSX software is available in three variations. VPSX Enterprise provides robust, scalable output and print management for UNIX, Linux, Windows, and other distributed environments. VPSX Workplace handles all aspects of Windows printing and enables support for accounting and mobile and virtualised environments. VPSX DirectPrint automates print driver management without the need for print servers, resulting in lower cost and reliable document delivery.

### LRS Enterprise Cloud Printing

LRS Enterprise Cloud Printing software provides all the functionality of the company's VPSX Enterprise, MFPsecure/Print, MFPsecure, and other server-based solutions but eliminates the need for on-premise software installation. The solution can be deployed in a customer's private cloud environment on AWS, Azure, Google, or IBM Cloud and supports business applications, VDI, desktop services, mobile devices, and mainframe.

### LRS Enterprise Cloud Printing Service

The LRS Enterprise Cloud Printing Service is a SaaS solution that runs in the Azure-based cloud. It provides the same robust output management functionality as a comprehensive managed service and is delivered against agreed SLAs.

### LRS CloudPrint

Designed for the SMB market, LRS CloudPrint is an Entra ID printing solution for small to medium-sized businesses that provides mobile cloud- and pull-printing, tracking, and reporting capabilities. CloudPrint offers similar functionality to the entry-level VPSX/DirectPrint product but cannot be extended beyond its standard features. Key features include a single admin portal, built-in printer driver management, automatic updates, data encryption in transit and at rest, and secure authentication through Entra ID.

### LRS Mission Control

The LRS Mission Control cloud-based service is available to customers using LRS VPSX and/or MFPsecure products at no cost and on an opt-in basis. The cloud-based portal provides an overview of a customer's LRS environment, including servers/components. Highlights are a list of licence keys, including the ability to push them to connected environments, a status dashboard showing system performance, and customisable reporting and analytics.

New SaaS services running in LRS Mission Control include:

- **Innovate/Audit Cloud.** Enables accounting and audit reporting without the need to install any database or reporting client on site or within the managed services private cloud. All reporting is available as a service regardless of where print is managed or controlled.
- **VPSX/DirectPrint Cloud.** Leverages the PPM and enables Direct IP printing in a multi-tenant SaaS. Print data is fully encrypted at rest and can be directed to the device in encrypted format if the device supports it.
- **MFPsecure/Print Cloud.** Works with VPSX/DirectPrint cloud for pull-printing. Jobs can be stored locally or sent to the SaaS to be released later using LRS MFPsecure printer-based clients.

## Security features

LRS offers a range of differentiated secure printing features:

- **Pull-Printing (Secure Delivery).** This enables users to authenticate at any printer on the network (e.g., using an employee badge), view the list of documents they submitted for printing at a previous time, and print only the ones they need. The user may also delete any print files they no longer need, and the feature also provides the capability to automatically purge documents that are not retrieved by users within a defined time.
- **Rights Management.** This key feature, typically not available on traditional pull-printing solutions, offers access control features, helping organisations improve security by controlling which MFP

features users/groups can access. This feature can be configured to prevent everyone from accessing the full feature set (for instance, installed apps) of the device.

### Key differentiators

- **Comprehensive solutions portfolio across on-premise and cloud.** LRS is well suited to large enterprises that want to retain print management on-premise/using private cloud. By running their existing on-premise LRS software in a private cloud, customers can manage print and output management for all applications and customise to suit specific business needs.
- **Flexible SaaS model for SMBs.** LRS's SaaS offerings provide greater flexibility around billing/payment methods, including being able to pay for the service with a credit card. New SaaS services running in LRS Mission Control offer customers a seamless migration path to and from the cloud.
- **Application integration.** Enables customers to integrate key business applications such as healthcare systems, document composition products, and enterprise content management solutions with their print management system.
- **Auditing and reporting.** Auditing and reporting capabilities enable enterprise-wide tracking and reporting of print, copy, and scan/fax activity. All data points are externally measurable and can be integrated into third-party predictive analysis tools using APIs. Standard and custom reports include accounting (cost), auditing (security/compliance), and analytics.
- **Advanced security features.** In addition to comprehensive secure printing features, LRS solutions are fully zero-trust compatible. The print-ready data stream is encrypted at rest and in motion and authenticated using standard OIDC methods so the data cannot be intercepted or substituted.
- **Cloud marketplaces.** LRS products are available on cloud marketplaces including the AWS Marketplace, Epic Showroom, and SAP Marketplace.

## 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.

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

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