

Cloud Print Services Landscape, 2026

Advancing cloud maturity for the print infrastructure



Executive summary

As hybrid work becomes firmly established across organisations, digital transformation has moved to the centre of strategic planning. Technologies such as artificial intelligence (AI) are rapidly becoming core drivers for how organisations operate and compete. Cloud platforms have already demonstrated their value as flexible, scalable foundations capable of supporting the pace of change in today's markets.

However, as cloud adoption has matured, many organisations have uncovered challenges that require renewed attention. Hidden and unpredictable costs, inconsistent approaches to resource optimisation, and uncertainty about the long-term value delivered by both the cloud platform and the service provider are now common concerns. Addressing these issues is essential to ensuring that cloud environments continue to deliver sustainable business value as organisational needs evolve.

Cloud-based print management entered the market later than many other cloud services, but adoption accelerated sharply throughout 2023–2025 and is set to continue. Organisations increasingly recognise that moving print management to the cloud reduces the burden on IT teams and lowers variable costs tied to power, maintenance, real estate, and system availability.

Traditional on-premises print servers demand heavy administration and are struggling to keep pace with modern requirements. Capabilities such as AI-driven optimisation and advanced security are difficult to implement and maintain in an on-premises model. A cloud-based approach simplifies management, improves scalability, and frees IT teams to focus on higher-value digital initiatives.

The latest findings from the Cloud Print Services Market Landscape, 2026 report highlight a market in significant digital transformation. Even though only a small minority of organisations (just 14%) describe themselves as fully paperless today, the momentum toward digitisation is unmistakably accelerating. Insights from [Quocirca's 2025 Document Capture study](#) show that 78% of organisations are increasing their digitisation efforts, underscoring a growing recognition of the need to modernise document workflows.

Looking ahead, this trajectory only strengthens, with 88% of respondents anticipating that digitisation will become critically important by 2027. The cloud print market remains fragmented, with vendors taking varied approaches such as cloud-first, cloud-native, and hybrid, creating a need for clearer positioning from OEMs and ISVs. Cloud capabilities are still a secondary factor in many MPS decisions, signalling a gap in market understanding. Concerns around security, performance, and feature parity continue to slow full cloud adoption, reinforcing hybrid as the dominant model. In addition, issues such as data sovereignty, perceived latency, and cost uncertainty are further delaying a complete shift to cloud print management. Addressing these barriers requires flexible solutions that integrate smoothly across both on-premises and cloud environments.

At the same time, however, demand for AI-driven automation, predictive analytics, and stronger security is pushing organisations towards cloud platforms, often while they still hold reservations about the implications. As AI adoption accelerates, seamless integration between cloud print services and broader cloud ecosystems will become essential to support intelligent, efficient document workflows.

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

- **Prioritise education.** Build stronger business cases across a broader set of services. Buyers will not be convinced by cloud print management alone. They need clear evidence of business value across workflow and information management, collaboration, advanced security, and flexible AI-driven services that can evolve as the market matures.
- **Offer hybrid solutions.** Concerns around data sovereignty and the perceived difficulty of moving directly from fully on-premises environments to pure cloud are driving demand for hybrid models. Providers must deliver flexible solutions that integrate seamlessly across on-premises and cloud infrastructures while offering a clear path towards fuller cloud adoption.

- **Address security and performance concerns.** Demonstrate robust security capabilities and consistent performance to reduce lingering hesitation and build confidence in cloud-based approaches.
- **Provide clarity on cloud strategies.** Help organisations navigate a fragmented market by clearly defining cloud-native and cloud-centric offerings and aligning these models with customers' specific operational and regulatory needs.
- **Acknowledge and mitigate repatriation concerns.** Understand the drivers behind cloud repatriation and offer solutions that accommodate shifting strategies. Look beyond print to adjacent services: while print management alone is rarely seen as a critical business issue, organisations recognise that information security, collaboration, and workflow efficiency are central to future success. MPS providers and partners must ensure their services address these broader priorities.

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 2026 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, Ricoh, Sharp, Xerox
- ISVs: Celiveo 365, NT-Ware (UniFLOW), OptimiDoc, PaperCut, Pharos, ThinPrint (ezeep), Tungsten Automation, Vasion (PrinterLogic)

Key findings

Cloud print adoption is strong and continues to grow, but the market is shaped by tension between the promise of cloud-enabled automation, security, and innovation and the practical constraints of sovereignty, legacy infrastructure, and risk aversion. Hybrid models dominate because they balance these forces, and both MPS providers and vendors must evolve their offerings beyond print management to deliver integrated, secure, AI-ready information workflows.

- **The cloud print market is maturing, but differentiation increasingly depends on how vendors extend beyond print.** The market remains fragmented across OEM and ISV offerings, with innovation emerging from both cloud-native software providers and OEMs that are expanding into workflow automation, analytics, and cloud-based capture services. The shift towards capture and intelligent document processing (IDP) is becoming a key point of differentiation, as vendors that combine print with scan, OCR, IDP, and workflow orchestration are better positioned to support broader digitisation and AI-ready document strategies.
- **Leaders and major players are differentiated by platform depth, security, and workflow integration.** Among the leaders, Xerox excels through its cloud-first, multi-tenant architecture, strong analytics, and broad workflow automation capabilities; Canon stands out for the breadth and maturity of the uniFLOW ecosystem and its integration of print, capture, and workflow; HP is distinguished by its scalable managed cloud infrastructure, layered security, and expanding AI-enabled workflow portfolio; Ricoh is notable for its flexible cloud-first platform strategy and integration across workplace, print, and digital services; and Konica Minolta stands out for its comprehensive cloud print and workflow suite, strong zero trust orientation, and device-agnostic cloud capabilities. Among the major players, Sharp is distinguished by the growing Synappx ecosystem and its expansion into AI-driven cloud capture and device management, while Epson stands out for reliable, cost-effective cloud print and scan services that are easy to deploy and manage, particularly through the channel.
- **Within a broad ISV market, differentiation is strongest where cloud print is combined with capture, security, and workflow automation.** Among the ISV ecosystem, PaperCut is notable for its broad cross-platform compatibility, mature cloud transition strategy, and strong support for mixed fleets; Pharos stands out for its cloud-native architecture, strong analytics, and zero trust-aligned security; Tungsten Automation excels through the combination of Printix cloud printing with capture, OCR, and hybrid integration; and Vasion stands out for unifying serverless print, output automation, and document workflow automation within a secure, cloud-native platform.
- **Cost, security, and print server reliance dominate top print management challenges.** Overall, 41% of organisations cite cost control as a primary concern, rising to 46% in the midmarket. This is followed by hybrid workplace security (38%) and the high overhead of on-premises servers (37%). This data represents a significant opportunity for suppliers of cloud print management platforms to educate customers on how robust cloud architectures can mitigate the capital and operational expenses associated with physical server deployment.
- **On-premises print infrastructure is becoming a more significant pain point.** Concern about the cost of purchasing and maintaining on-premises print servers rose from 31% in 2024 to 37% in 2025, with smaller and midmarket organisations particularly affected (40%). Energy consumption, resilience, and administrative overhead are key contributors. Serverless and fully managed cloud or hybrid print services are increasingly attractive as a means of removing infrastructure burden from IT teams.
- **Cloud print adoption has reached the mainstream but varies by region.** Overall, 78% of organisations report that they are using some form of cloud print management, rising to 86% in the UK and 92% in the retail sector and dropping to 67% in France. In high-adoption regions and sectors such as retail, MPS providers and cloud print management vendors have a significant opportunity to lead with education on the cost and security benefits of robust cloud platforms to drive infrastructure modernisation.
- **Security concerns continue to drive hybrid cloud models.** Top barriers to cloud print adoption are data security (34%, rising to 44% in Germany and 41% in the US), reliability and uptime (25%, rising to 31% in Germany), and consistent printing across a multi-vendor printer fleet (22%). SMBs are most

concerned about performance (28%), and data sovereignty concerns are highest in larger organisations (20%).

- **AI maturity closely tracks cloud maturity, and print is part of the on-ramp.** Over half (53%) of organisations in which AI is fundamental to strategy are cloud-native, compared with just 18% of those yet to begin AI exploration. Cloud platforms are increasingly seen as the only viable foundation for AI-driven automation and analytics. Cloud print management is no longer just an operational decision; it is becoming a strategic enabler for AI-ready, intelligent document workflows.
- **Investment in cloud document capture is accelerating alongside cloud print.** More than three quarters (77%) of organisations expect growth in cloud capture adoption, with 35% anticipating a significant increase and a further 42% expecting a slight increase over the next 12 months. Scan volumes are also rising, with 66% expecting increased MFP usage. Cloud print and cloud capture are converging into a single, AI-enabled document infrastructure, creating opportunities for vendors that can deliver integrated platforms.
- **MPS providers are critical in the cloud journey.** Helping simplify complex cloud transitions will become a primary competitive differentiator. Overall, 40% of MPS customers say it is very important that their MPS provider helps with the shift to cloud print infrastructure, an increase from 30% in 2024. This rises to 50% in the US and 49% in the UK, but drops to 17% in France. Satisfaction with support in shifting to cloud print infrastructure is good, with 42% stating their MPS partner has been very effective with helping them make this transition. This reinforces the shift in the MPS role from device supplier to broader digital services partner, with cloud migration, security, workflow, and information governance becoming central to long-term customer value.
- **The market outlook points to continued cloud growth, but with hybrid as the dominant path forward.** Adoption will continue to expand as organisations seek lower infrastructure overhead, stronger security, and better support for AI-enabled automation and digitisation. However, full cloud migration will remain gradual, with hybrid models prevailing where customers need flexibility around sovereignty, resilience, legacy integration, and performance, while the strongest vendors will be those that connect print, capture, workflow, analytics, and security into a coherent cloud platform strategy.

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Vendor profile: Tungsten Automation

Quocirca opinion

Tungsten Automation's go-to-market strategy blends direct engagement with end users and partnerships with managed service providers (MSPs) and traditional copier/print dealers. Printix – its multi-tenant public cloud print platform – is driving increased MSP adoption, as it supports end customers' broader digital transformation initiatives. The platform's availability through cloud marketplaces such as Azure Marketplace, Google Cloud Marketplace, and Pax8 further expands reach.

Security and resilience

Printix is built on a Kubernetes-orchestrated microservices architecture and is cloud-native by design. This provides elastic scaling, enterprise-grade resilience, and global reliability for enterprise customers. Printix is designed to be compatible across modern device fleets and is well suited to SMBs and large enterprises operating multi-vendor print fleets. It also includes native support for Windows Arm-based devices, including Surface models powered by Snapdragon processors.

Tungsten Automation prioritises zero trust security principles and data sovereignty requirements. Printix supports Capture Data Sovereignty (powered by Tungsten OCR) and cloud-agnostic S3 compatibility, enabling organisations to store print and capture data in their own environments. This ensures full data ownership and supports compliance-driven workflows.

Security concerns around transmitting print jobs over the internet are mitigated through encryption, zero trust configurations, and local print-only options. In addition, Printix maintains over 99.9% uptime and provides offline printing and data caching to address connectivity issues.

Integrated print and capture

The Printix platform stands out for its integrated print and capture capabilities. Advanced OCR scanning is delivered through Tungsten OmniPage, enabling capture workflows on supported multifunction devices via Printix Go and on mobile devices through the Printix app. Typical workflow destinations include email, OneDrive, and SharePoint Online, with the Capture API enabling broader integration into other third-party systems.

Printix also integrates with Tungsten ControlSuite, TotalAgility, SAP Cloud Print, and other third-party print and workflow solutions.

Support for hybrid environments

To support complex hybrid environments, the Printix Redirector provides a 'Better Together' integration with Tungsten ControlSuite at no additional cost. This enables organisations to combine public cloud simplicity with deep on-premises forensic security. The Redirector also resolves edge-case scenarios such as Azure Virtual Desktop (AVD) printing and local USB printing, ensuring continuity across distributed workforces.

Printix supports remote and mobile printing, including non-networked home printers, aligning with hybrid work trends. Centralised management and delegated administration allow granular control across distributed environments.

Generative AI

Tungsten Copilot leverages generative AI to simplify print management through natural language commands. AI support guides users through routine tasks such as subscription and role management, site and network settings, analytics options, and printer discovery, as well as authentication setup (e.g., Entra ID, Google, Okta), capture workflows, cloud storage connections, and routine support requests – reducing administrative overhead for IT teams.

Recent enhancements include ERP integration for revenue-driven printing, enabling VPN-less delivery of mission-critical documents such as shipping labels and invoices directly from ERP systems to endpoints. Seamless integration with S3-compatible storage across private clouds and the Printix cloud enables serverless print and scan workflows from ERP systems and enterprise applications, regardless of cloud provider.

Product overview

Tungsten Automation offers two primary print management solutions that can be tailored to hybrid configurations.

Printix

Printix is designed to help organisations transition their print and capture workflows to a cloud-based environment. It supports smooth migration by integrating with existing legacy systems and on-premises infrastructure through the Printix Redirector feature. This enables customers to modernise at their own pace and maintain hybrid deployments when needed.

By removing the need for physical print servers and VPNs, Printix enables a fully serverless model that reduces operational costs and dependence on on-premises hardware. Printix automates driver management, printer discovery, and provisioning across networks and locations. Native OEM drivers (and some universal drivers) are available in the Printix driver library, and administrators can also choose to configure printing with a universal driver for specific scenarios.

IT teams benefit from centralised automation through a single web-based dashboard. Users gain secure, consistent access to printing from any device, whether they are in the office, at home, or on the move, and the platform's scalable architecture supports organisations of any size.

Security and compliance are reinforced through encrypted, zero trust-aligned workflows, along with detailed reporting and audit trails that help meet regulatory requirements. In most cases, print jobs remain local; only reporting data is sent to the Printix tenant. Customers can also choose to store data in private cloud storage, securely in their Printix tenant, or any combination of the three.

ControlSuite

ControlSuite transforms document capture, print, and mobile workflows by applying content-aware process intelligence within a single, fully integrated suite that supports modern cloud-based services. It enables secure print-to-me release at MFPs through the embedded Tungsten Unified Client and the Tungsten Business Connect mobile app.

ControlSuite works seamlessly with card readers from major OEMs to support card, NFC, and BTLE-based job release. It also delivers comprehensive print management capabilities, including cost allocation, reporting, analytics, and content-aware print and output control.

Advanced output management features such as hybrid print, content and print stream control, and print protocol transformation enable non-Windows systems to print to Windows-based printers. It can also transform print protocols from older non-Windows mainframes into OCR-enabled PDFs for automated document classification and file naming.

Key differentiators

- **Analytics and reporting.** Printix integrates with Microsoft Power BI for comprehensive print usage insights.
- **Integrated print and capture.** Advanced OCR scanning is delivered through Tungsten OmniPage, enabling capture workflows on supported multifunction devices via Printix Go and on mobile devices through the Printix app.
- **Support for hybrid environments.** To support complex hybrid environments, the Printix Redirector provides a 'Better Together' integration with Tungsten ControlSuite at no additional cost. This enables organisations to combine public cloud simplicity with deep on-premises forensic security.
- **ERP integration.** Printix supports ERP integration for revenue-driven printing and enables VPN-less delivery of mission-critical documents, such as shipping labels and invoices, directly from ERP systems to endpoints.

Recommendations

Buyer recommendations

Overall, cloud-based business solutions can offer a more effective means of enabling business functions for organisations than on-premises solutions. As long as the buyer carries out due diligence and finds the right solution, variable costs, business interference from downtime, security lapses due to lack of updating systems, and so on should all be more easily avoidable. Increasingly, cloud-based solutions also offer a much better way to keep up with the pace of change in modern, business-critical technologies.

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. Ensure that the future is catered for: do not just look at simple print management functions, but consider what is required around a total information management solution, including IDP, workflow, collaboration, and security.
- **Consider existing enterprise systems.** Integration of data workflow, whether as digitised inputs via scanning or outputs via printing, must be considered when looking at existing enterprise systems such as ERP, CRM, and HR. Ensure that the chosen solution adheres to open standards to more easily enable such integrations.
- **Compare the relative merits of fully on-premises, hybrid, and fully cloud-based solutions.** Your existing solution may require a stepping stone to the cloud, dictating the need for a hybrid solution of on-premises and cloud-based print management capabilities. In other cases, the need for information security and fears around data sovereignty may dictate a different hybrid approach, combining on-premises management for aspects of the print environment with cloud-based management for others.
- **Focus on security capabilities.** The lifeblood of any organisation lies in its intellectual property, which is tied up in its electronic information. Ensuring that such information is secure must outweigh all other considerations. 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.
- **Consider other areas where integration is required.** 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. Data generated on print devices may also be of use to other enterprise systems, such as building information modelling (BIM) and intelligent building management systems.
- **Consider the future of print drivers.** For those operating a primarily Microsoft compute environment, remember the company is changing the way print drivers will be layered over its own environment in the future. The move to enforcing the use of Microsoft Windows Protected Print Mode will mean print device OEMs and print management vendors will need this new model to provide enhanced printer capabilities. Ensure that a chosen provider is planning for this.
- **Ensure clear, comprehensive, and appropriate pricing.** Cost is a major issue stated by cloud users. This is generally based around cloud platform providers offering a raft of costs based on different uses. Pricing should be much clearer for print management. Vendors may offer per-device, per-user, per-queue, or per-time segment models. Specific pricing models may be more advantageous depending on usage and the number of devices. Ensure that the chosen solution offers clear and predictable billing. Organisations should also allow for changes in the size and configuration of the print fleet.

Supplier recommendations

Not only is the cloud here to stay, but buyers are increasingly looking at it as a first choice. However, there remain numerous actual and perceived issues around cloud usage. A balanced portfolio of robust cloud-native, hybrid

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:

- **Directly address user concerns.** Ensure security concerns are addressed by demonstrating robust encryption for data on the move and at rest, access control, and threat detection capabilities. Ensure your solution integrates well with third-party security tools (e.g., SIEM systems) and meets relevant regulatory and industry-specific standards. Offer solutions that allow customers to control their data and comply with regional regulations, leveraging sovereignty services from the cloud provider and hybrid solutions using on-premises devices that restrict data storage to within the customer's own environment. Provide transparent and predictable pricing models, demonstrating clear cost benefits and ROI.
- **Offer tailored migration strategies and embrace hybrid flexibility.** The market is not an 'either/or' choice for customers. Although many organisations are now looking for a cloud-first/cloud-only print management solution, many others are caught in what they perceive as a trap of on-premises functionality that they need to maintain. Guide customers through the journey, providing expert advice and customised migration plans. Offer seamless integration between on-premises and cloud solutions, enabling gradual migration and mitigating repatriation risks.
- **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 each solution offers and the relative merits of each. Provide a roadmap for cloud print management that aligns with the business's cloud strategy.
- **Ensure that 'print management' is not just about print.** Buyers are looking for desired business outcomes, not just cost savings through carrying out administrative IT functions more efficiently. IDP, workflow, and collaboration are all areas where print providers should be extending offerings to give businesses a better means of dealing with their intellectual property.
- **Focus on meaningful AI integration.** Do not just jump on the AI bandwagon, repurposing machine learning or analytics capabilities as AI. Look to how basic AI can offer distinct and discrete benefits around fleet optimisation, lowering operational costs and enhancing fleet availability. Work on integrating other AI capabilities, such as advanced IDP and workflow optimisations, to enable customers to better compete in their markets. Look at generative AI, agentic AI, and other forms of AI to provide better ways of delivering information and information flows around the business and to customers, suppliers, and other external stakeholders.

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.

For more information, visit www.quocirca.com.

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