



IDC FutureScape: Worldwide Imaging, Printing & Document Solutions 2018 Predictions

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Mick Heys, VP, European Imaging, Printing & Document Solutions
Robert Palmer, Research Director, Imaging, Printing & Document Solutions

November 9, 2017

Logistics

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Today’s Speakers



**Keith Kmetz, Program VP,
Imaging, Printing &
Document Solutions**

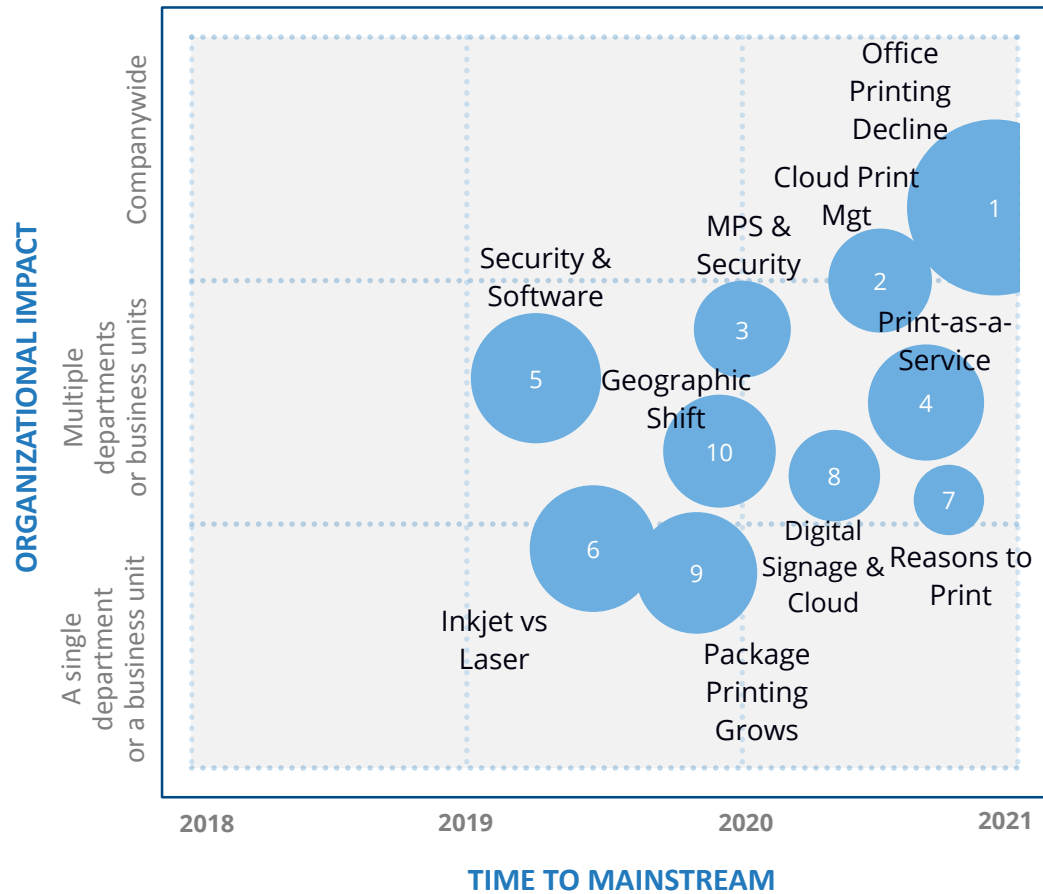


**Mick Heys, Vice President
European Imaging, Printing
and Document Solutions**



**Robert Palmer, Research Director
Imaging, Printing and Document
Solutions**

IDC FutureScape: Worldwide Imaging, Printing & Document Solutions



Note: The size of the bubble indicates complexity/cost to address. Source: IDC, 2017

- 1 By 2021, 40% of Companies in Developed Regions Will Have Experienced a Double-Digit Decline in Office-Based Printing Due to the Ability to Intelligently Mine Data and Automate the Extraction Of Business Intelligence.
- 2 By 2021, One-Third of Companies With Fewer Than 500 Employees Will Have Adopted Structured Print and Document Management Policies Supported by Cloud-Based Software.
- 3 By 2021, 60% of Managed Print Services (MPS) RFPs Will Include the Provision of Ongoing Security Auditing Services of the Print and Document Infrastructure.
- 4 By 2021, 45% of All Office Print Devices Shipments Worldwide Will be Sold as Part of a Print-as-a-Service Contract.
- 5 By 2020, Concerns Over Cyberattacks, Breaches, Content Hijacking and Leakage Will Have Driven Larger Organizations to Reallocate Up to 35% of Their Document Solutions Budgets to the Deployment of Security Software Across Their Entire Print Fleets.
- 6 By 2020, Inkjet Will Have Taken Up to 20% of the Workgroup/Departmental Office Printing Market Segment Share From Conventional Laser Technology, Driven by Inkjet's Anticipated Improvements in Speed, Quality and Operational Costs.
- 7 By 2021, More Than Half of the Primary Office Printing Applications Will Be Relegated to Either Personal Habit or the Desire to Provide Physical Copy to Recipients Outside of the Organization.
- 8 By 2021, 50% of Digital Signage Systems Worldwide Will Reside in the Cloud.
- 9 In 2020, Brand Owners and Manufacturers Will Use Digital Package Presses to Produce Over Seven Billion Square Meters of Value-Added and Targeted Package Print.
- 10 By 2020, More Than Half of the Printer Hardware Products Shipped Will First Be Manufactured And Designed With China and Other Asia-Pacific Countries in Mind and Then Modified, Exported, and Sold in Developed Regions.

Drivers for Imaging, Printing & Document Solutions

- ✓ Accelerating DX: Technology-centric transformation altering business and society
- ✓ Pace of Change: Technology capabilities enable sustainable change at the speed of digital business
- ✓ Global Volatility: Political, social and economic disturbance
- ✓ Sense, Compute, Actuate: The new data-centric paradigm
- ✓ Cyber Threats: Theft, ransom, cyberattack on the rise
- ✓ Shifting Economics: Changing value structures & rise of digital capital
- ✓ Innovation Impasse: Legacy systems constraining transformation

*For additional details on the above Drivers, please refer to –
IDC FutureScape: Worldwide Imaging, Printing & Document Solutions 2018 Predictions
(Doc #US43152617)*

IDC FutureScape: Imaging, Printing & Document Solutions Predictions Highlights

Prediction 1: By 2021, 40% of Companies in Developed Regions Will Have Experienced a Double-Digit Decline in Office-Based Printing Due to the Ability to Intelligently Mine Data and Automate the Extraction of Business Intelligence

Prediction 3: By 2021, 60% of Managed Print Services (MPS) RFPs Will Include the Provision of Ongoing Security Auditing Services of the Print and Document Infrastructure

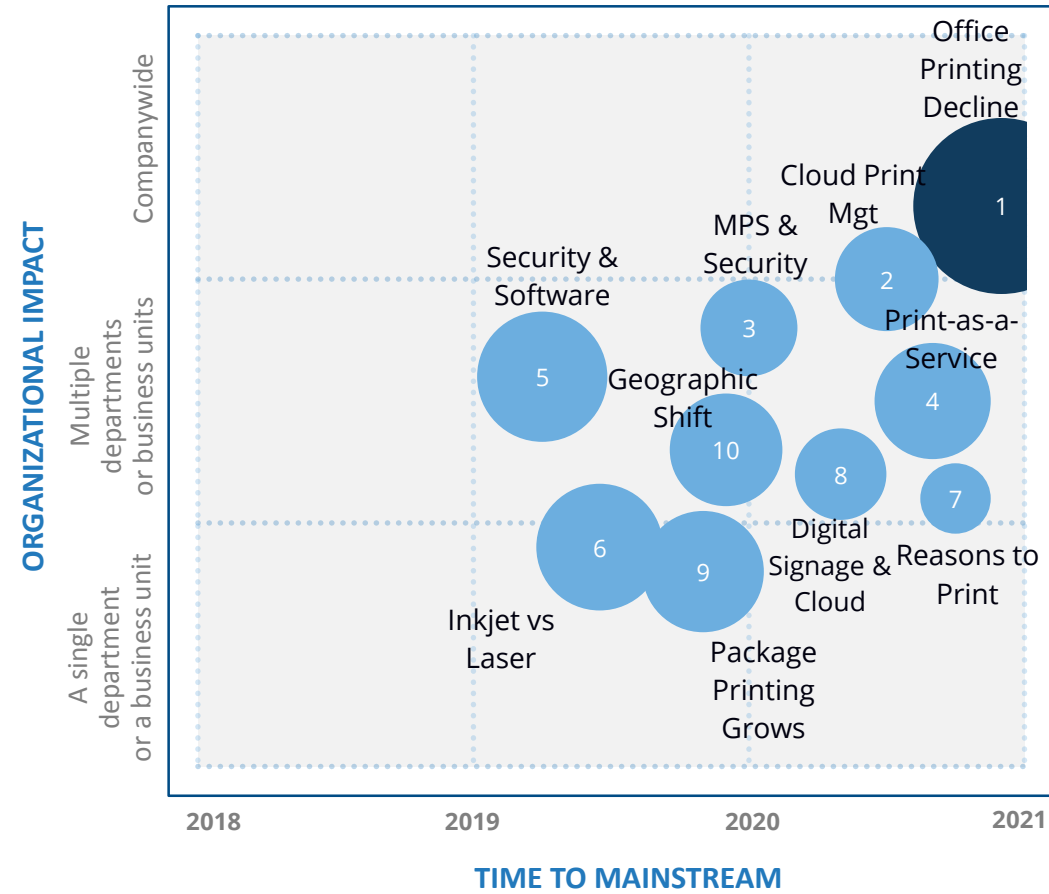
Prediction 4: By 2021, 45% of All Office Print Devices Shipments Worldwide Will Be Sold as Part of a Print-as-a-Service Contract

Prediction 6: By 2020, Inkjet Will Have Taken Up to 20% of the Workgroup/Departmental Office Printing Market Segment Share From Conventional Laser Technology, Driven by Inkjet's Anticipated Improvements in Speed, Quality and Operational Costs

For additional details on the above Predictions, please refer to - IDC FutureScape: Worldwide Imaging, Printing & Document Solutions 2018 Predictions (Doc #US43152617)

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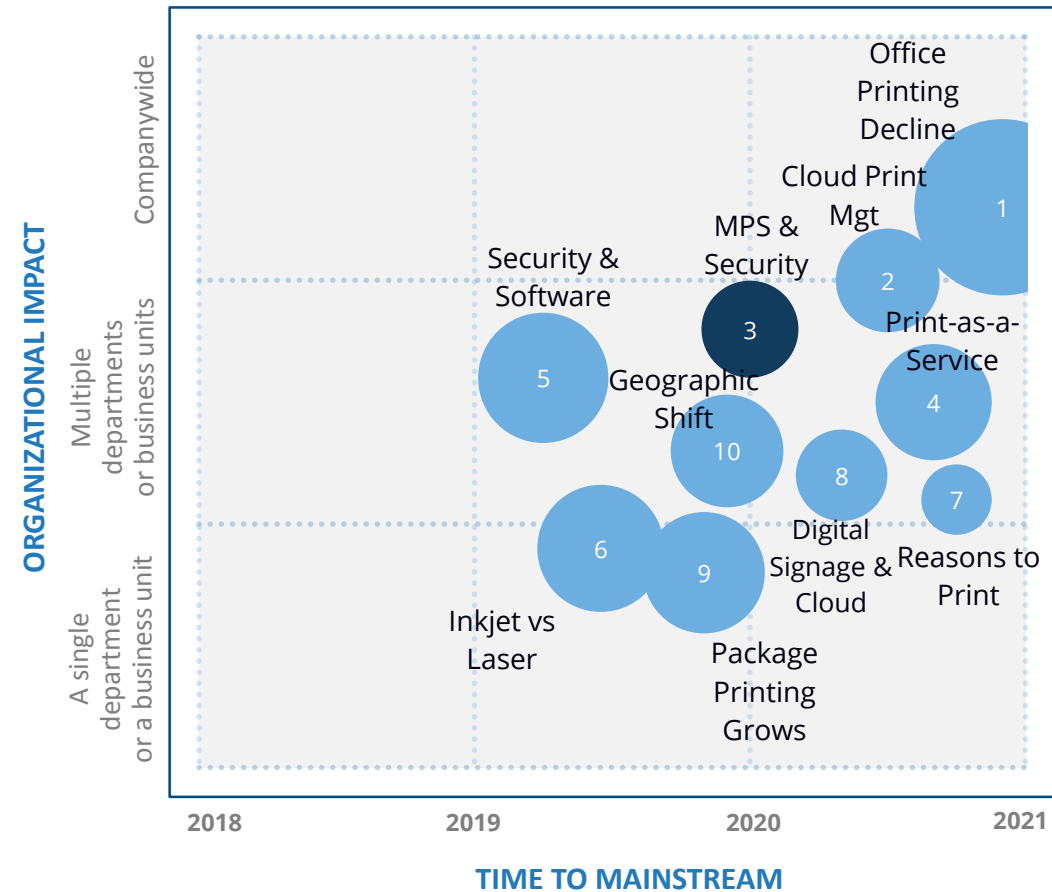
<h2>IT Impact</h2>	<ul style="list-style-type: none"> ✓ Bolster IT's digital capabilities as technology development accelerates. ✓ More collaboration will be required between IT, the line of business and a chief technology officer or digital transformation officer. ✓ Management buy-in is essential. Develop clear rationale for technology adoption and specific benefits. ✓ Place specific emphasis on customer-centric processes to improve response times and easier resolution of customer issues.
<h2>Guidance</h2>	<ul style="list-style-type: none"> ✓ Partner with a print and document services provider who can support your digital transformation. ✓ Deploy a change management process, as technology adoption results in a fundamental reconstruction in how companies do business and provides a clear understanding of what skills are required in future. ✓ SMBs should not assume these technologies are for larger enterprises only. It is an opportunity to easily trial and adopt new technologies.



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Prediction 3: By 2021, 60% of Managed Print Services (MPS) RFPs Will Include the Provision of Ongoing Security Auditing Services of the Print and Document Infrastructure

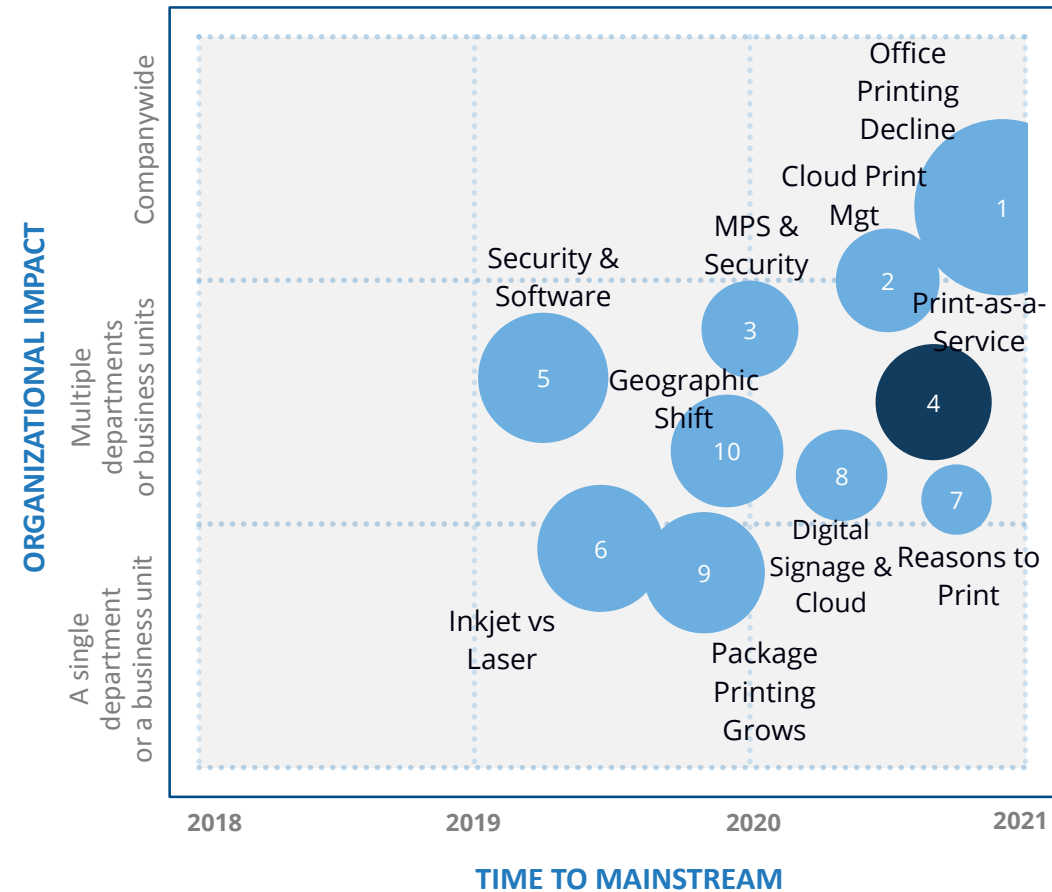
<h2>IT Impact</h2>	<ul style="list-style-type: none"> ✓ Security and compliance policies have become fundamental components of business goals and operational strategies. ✓ The growing number of print security services that take advantage of embedded device features will enable businesses to deploy security services across the entire fleet. ✓ Employees will become well trained on usage and compliance policies.
<h2>Guidance</h2>	<ul style="list-style-type: none"> ✓ Partner with a print and document services provider who can support your digital transformation. ✓ Deploy a change management process, as technology adoption results in a fundamental reconstruction in how companies do business and provides a clear understanding of what skills are required in future. ✓ SMBs should not assume these technologies are for larger enterprises only. It is an opportunity to easily trial and adopt new technologies.



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Prediction 4: By 2021, 45% of All Office Print Devices Shipments Worldwide Will Be Sold as Part of a Print-as-a-Service Contract

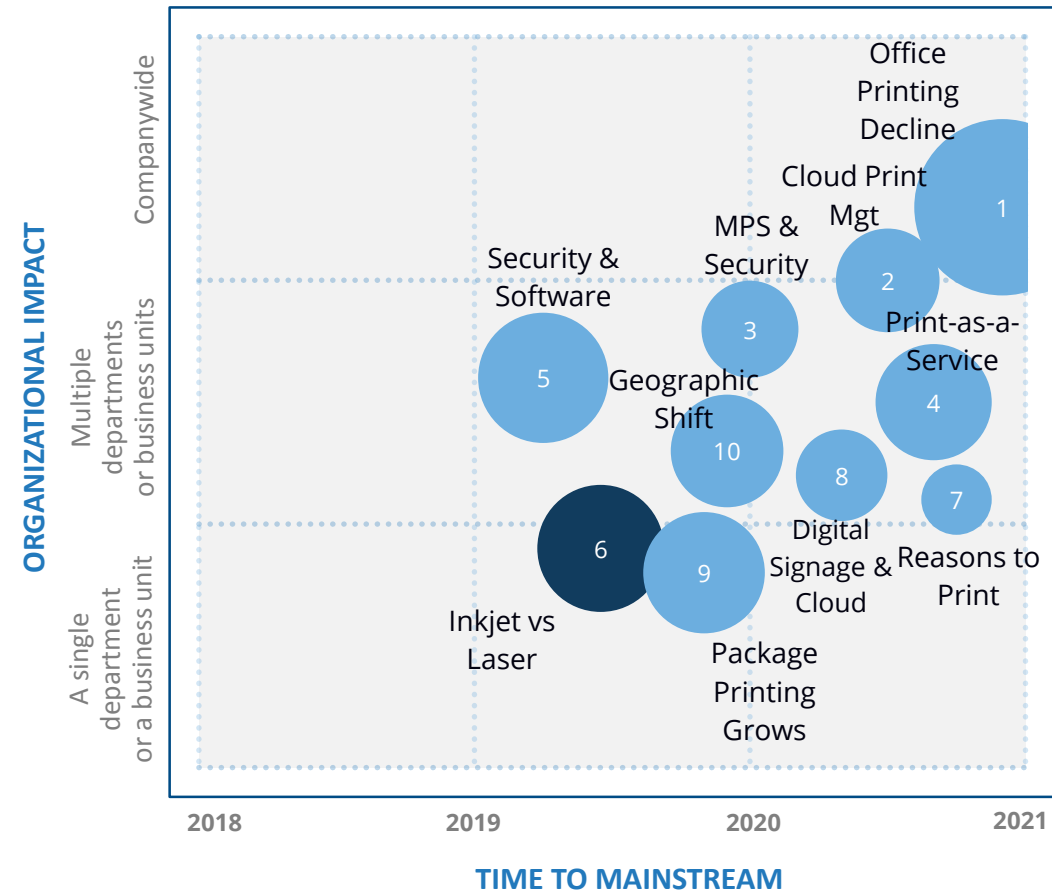
<h2>IT Impact</h2>	<ul style="list-style-type: none"> ✓ Print can no longer be viewed in isolation; it must be considered as part of the overall IT infrastructure and aligned with company-wide corporate, procurement and security goals. ✓ More contract choice can bring greater confusion and more organizational risk. ✓ The suitability of a print contract for your organization cannot be measured on one sole metric - such as cost per page, for example.
<h2>Guidance</h2>	<ul style="list-style-type: none"> ✓ Ensure that print and IT stakeholders are working in unison to comply with corporate governance ✓ Carefully evaluate all your contract options. Compare like with like and always read the small print. Subscription and usage models may not be suitable for larger organizations. ✓ Involve all stake-holders to ensure that your print-as-a-service contract delivers on cost, security, environmental and business process efficiency fronts.



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Prediction 6: By 2020, Inkjet Will Have Taken Up to 20% of the Workgroup/Departmental Office Printing Market Segment Share from Conventional Laser Technology, Driven by Inkjet's Anticipated Improvements in Speed, Quality and Operational Costs

<h2>IT Impact</h2>	<ul style="list-style-type: none"> ✓ Business inkjet's improved office printing solution gives IT another legitimate choice to consider as part of the print acquisition process. ✓ IT will need to develop or incorporate a 3rd party to utilize a tool to monitor the organization's use of business inkjet devices for cost implications, greater use of color and ROI.
<h2>Guidance</h2>	<ul style="list-style-type: none"> ✓ Use an assessment tool to map out the deployment of both business inkjet and laser devices. ✓ Monitor usage of the equipment. Companies should regularly measure the impact of what is promised with business inkjet technology in order to accurately gauge a positive experience. ✓ Consider a pilot program where a selected department(s) is chosen for the use of business inkjet devices.



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Q&A

Today's Speakers



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Program VP

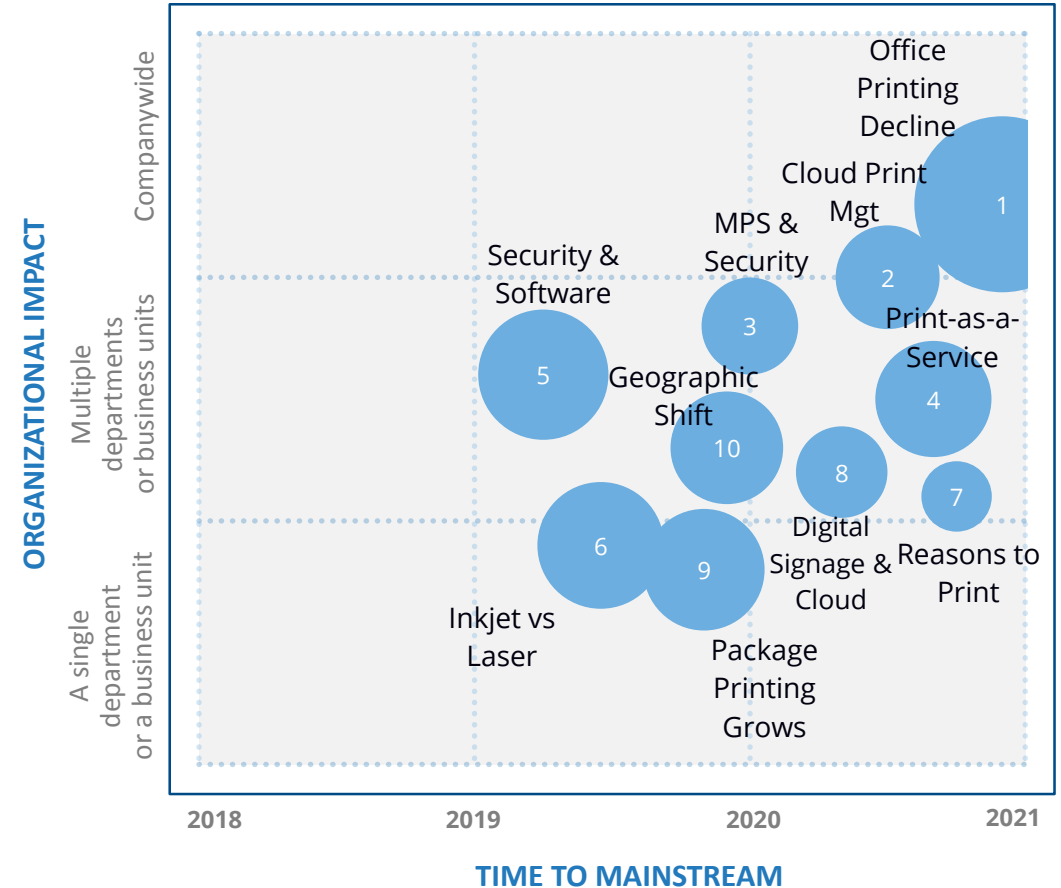


Mick Heys
VP



Robert Palmer
Research Director

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[Click here to learn more about all of IDC's FutureScape 2018 Predictions](#)

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IDC Helps You Succeed on Your DX Journey



PLANNING

Digital Strategy
Crafted

IDC helps you define your **digital strategy** and strategic priorities



EXECUTION

Digital Roadmaps
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IDC helps you prioritize the programs and use cases for your **digital roadmap** and develop the **IT capabilities** required for DX



COMPETITIVE ADVANTAGE

Technology
Investments Made

IDC helps you identify the **technologies** that will provide you with a unique differentiator



SPEED

Technology
Partners Selected

IDC helps you vet **technology partners** that can bring your innovations to market faster

IDC's IT Executive Program is committed to supporting your business globally in your Digital Transformation journey. We help clients mitigate risk, apply innovation, speed time to market, and drive business outcomes across IT and the line of business.

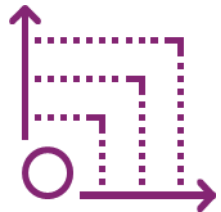
IDC is Uniquely Qualified to Assist with Your DX Initiatives



450+ digital transformation use cases for inclusion in your digital roadmap



Dozens of KPIs specifically developed for the digital enterprise



Digital maturity benchmarks to assess how your organization compares with peers



Research on the most appropriate organizational structures for your stage of DX



Architectural maps for an enterprise digital platform



Blueprints of DX capabilities

IDC's CIO & Tech Exec Forum



Join IDC's exclusive LinkedIn forum designed for IT executives for learning opportunities, direct access to IDC's industry experts and complimentary research.

<http://www.linkedin.com/groups?gid=7448619>

Please note: Membership is restricted to technology executives (i.e., CIOs, CSOs, CISOs, VPs, etc) or their equivalent involved in the purchase, evaluation or recommendation of IT products/services within their organizations.

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