



Channels to Managed Print Services, 2018

The channel landscape for MPS in the US and Europe

April 2018

Managed print services (MPS) are an untapped opportunity for channel organisations to extend their influence within the small and mid-sized business (SMB) market, helping customers improve productivity, increase efficiency and reduce costs.

MPS adoption in the SMB market remains relatively low, compared to the enterprise market. While leading channel organisations have invested in the resources, expertise and infrastructure required to offer and deliver MPS, others have yet to make the leap.

Channel organisations are relying on print manufacturers to support a successful transition to an MPS model. In addition, channel organisations are increasingly looking for suppliers that have broader IT services expertise – including digital transformation and security – to expand their offerings beyond print.

This report provides an overview of channel MPS offerings from major print manufacturers and also highlights the findings of research conducted in 2017 amongst 320 channel organisations in the US and Europe.

SUMMARY BROTHER EXCERPT

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Executive summary

The managed print service (MPS) model is proving an attractive prospect for channel organisations seeking to protect and grow future revenue, against a backdrop of hardware commoditisation and shrinking margins.

The small and mid-sized business (SMB) market is ideal for the channel organisations aiming to enhance their status as trusted advisors. SMBs face a range of challenges in tackling escalating print costs and driving business efficiency. Budget constraints and a lack of internal resources are driving many to turn to managed IT services in general to better control and manage their IT infrastructure. Many print-focussed channel organisations are well positioned to capitalise on the momentum towards cloud-based, 'as-a-service' IT consumption amongst SMBs, by positioning MPS as an enabler of improved productivity and efficiency.

By accelerating the shift to a services-led business model, channel organisations can increase the proportion of their business that comes from recurring revenue, leading to deeper and longer customer relationships, healthier margins and better long-term revenue prospects.

Growing pains

However, the shift to MPS is a work in progress for many channel organisations as the transformation requires significant changes to be made. Copier dealers may have built up decades of expertise in developing the infrastructure to serve clients on a contractual basis, but other channel organisations do not have such capabilities and may find themselves needing to build new platforms, design new services, and develop recurring billing processes.

Consequently, many print channel organisations still make most of their revenue on their legacy transactional equipment and peripheral sales. Quocirca's survey reveals that transactional sales continue to represent just over 60% of revenues for print channel organisations. However, the shift to building a recurring service model through MPS is underway: 35% have fully evolved to MPS with 37% indicating they have started, the remainder say they have yet to start or have no interest in growing their MPS business. For those that have made the transition, 34% report that their revenue increased by over 5% in 2017 compared to 2016. This compares to 24% of those not selling MPS report revenue growth of over 5%.

Although most channel organisations are evolving their business and moving beyond traditional sources of revenue, this is not without its challenges. Overall, 54% report that their biggest concern in growing their MPS business is too much competition from other MPS providers, which includes their own suppliers. A skills gap is clearly evident: 50% report that sales and technical resources skills are a key barrier to delivering MPS.

Room for improvement

MPS programmes vary widely in effectiveness. Top areas in which vendors are failing to deliver are margin retention, response times, lead generation and vertical market knowledge. 77% of channel organisations rate margin retention as an important factor in choosing their MPS programme, but just 47% are satisfied with this. 67% rate short response times as important, but only 48% are satisfied. Just 39% are satisfied with lead generation, compared to 55% who rate it as important. 72% rate vertical expertise highly yet only 49% are satisfied.

Evolving vendor programmes

Fortunately, leading print manufacturers are simplifying and expanding their channel propositions to make MPS accessible to all potential partners, regardless of their MPS maturity. The most comprehensive programmes offer a broad range of support – including centralised portals, technical resources, marketing programmes and financial support, generally delivered via cloud-based platforms. This helps resellers maximise their chances of succeeding by eliminating the barriers associated with transitioning to MPS.

About this report

This report discusses findings from Quocirca's channel study conducted in November 2017, which investigated attitudes amongst 320 resellers in the UK, France, Germany and the US. The report also draws on findings from Quocirca's Global Print 2025 Study¹ which included end-user interviews across 575 SMBs and enterprise organisations along with interviews with 55 print industry executives. In addition, the report includes profiles of the channel programmes of leading print vendors in the market today.



Key findings

- **MPS is still a work in progress.** Just over a third (35%) of channel partners indicate they have evolved to an MPS business, with a further 37% saying they have just started MPS. Channel partners express concerns in a number of areas as they build their MPS business. Overall, competition was rated as a top concern by 54% of channel organisations, followed by building sales and technical expertise. Notably, US resellers are more likely to report a lack of interest from current customers as a challenge (53%, compared to 31% of UK resellers). Resellers in Germany are more likely to point to conflict with vendors as a stumbling block than those in other countries.
- **Those that have made the leap are reaping the benefits.** Overall, 34% of channel organisations already selling MPS have increased their revenue by 5% or more in the last year. This compares to 24% of channel organisations which are not selling MPS that have seen an equivalent rise in revenue. The leading benefit following a move to selling MPS has been the expanded opportunities for selling document workflow solutions, noted by 67% of channel organisations. Over half (55%) also agree that MPS has provided further opportunities to sell non-print related services such as IT services. Traditional print channel partners must be willing to step outside their comfort zone to capitalise on the opportunities.
- **Channel MPS programmes are failing to deliver in key areas.** MPS programmes vary widely in effectiveness. Top areas in which vendors are failing to deliver are margin retention, response times, lead generation and vertical market support. Overall, 77% of channel organisations rate margin retention as an important factor in choosing their MPS programme, but just 47% are satisfied with this. 67% rate short response times as important, but only 48% are satisfied. Just 39% are satisfied with lead generation, compared to 55% who rate it as important. 72% rate vertical expertise highly yet only 49% are satisfied.
- **Partners believe that vertical market expertise will be key to profitability by 2020.** The clear majority (91%) of channel organisations agree that they need to expand their vertical expertise by 2020. To this end 72% plan to expand their product portfolios, 68% plan to offer new software products and 64% are looking to acquire another channel organisation. While MPS is viewed as the biggest opportunity today, by 2020 channel partners expect that vertical workflow applications and security solutions will offer the greatest opportunities.
- **The competitive landscape is diverse, with Xerox and HP leading the pack.** Xerox has long led the market by virtue of a scalable, cloud-based MPS platform and an expanded ConnectKey workflow solution portfolio. Xerox continues to invest heavily in its channel programmes in both the US and Europe, expanding its accreditation levels and offering valuable training and support resources for partners. HP is making strong gains, having made significant progress in the past year. Following the acquisition of Samsung, it has deepened its channel engagement and removed complexity from its legacy programmes. Its Smart Device Services platform, which is integrated with a range of leading MPS tools, promises to be a key enabler for channel partners to improve remote diagnostics and fleet optimisation.



MPS definitions

What does channel-led MPS include?

Channel-packaged MPS offerings, provided by print vendors, aimed at SMBs vary in depth and scale.

SMB-focussed MPS offers a way for smaller organisations to purchase printers combined with supplies, maintenance and support through an all-inclusive contract. with a monthly fee covering the cost of the equipment, leasing, supplies, service and support. An MPS contract may be set up in three ways:

1. Predicted monthly print volumes. When predicted volumes are exceeded an 'overage' charge is generally applied – a set price for each page printed over and above the agreed number.
2. A monthly or annual print volume commitment where the client will pay for printing a set number of pages, even if they don't use the full amount.
3. Only pay for what is printed, however a requirement to commit to a service contract for a minimum period may still be required.

Depending on their capabilities, resellers may offer additional services as part of a MPS, such as assessments, device consolidation consultancy and/or document workflow solutions. Some also offer flexible packages that enable businesses to scale up their usage as they grow.

The following table describes the key differences between a basic MPS and a full MPS approach.

| Category | Description | Channel requirements |
|---|--|---|
| Basic: maintenance, supplies, and support | Hardware, supplies, service, support, and finance based on cost-per-page | Minimal investment – simple and quick to operate, no software, no audits, no complexity |
| Full: assessment, optimisation, and management | Monitoring and reduction of print volumes, environmental impact and costs, and improving workflows | Some investment – print audit tools, multi-vendor support, remote monitoring |

Figure 1. MPS definitions



The following capabilities are fundamental in any MPS offering:

| Features | Benefits |
|---|---|
| Automatic meter or counter reading | <ul style="list-style-type: none"> • No need to spend time on manual meter reads • Greater billing accuracy • Automatic invoicing |
| Automatic error notification | <ul style="list-style-type: none"> • Predicts equipment failure • Improves uptime • Less user intervention |
| Automatic toner/ink management and supplies ordering | <ul style="list-style-type: none"> • Proactive maintenance and replenishment • Improved inventory management |
| Device usage reports | <ul style="list-style-type: none"> • Optimised hardware usage through more efficient data collection and analysis • Better device utilisation and management • Advance warning when the device is reaching end of life |
| Customer portal or web interface (for both the customer and MPS provider) | <ul style="list-style-type: none"> • Improved customer experience – an easy, fast and efficient way to monitor device and print usage • Service provider can analyse customer use of print to improve service levels |
| Remote management, for example automatic software upgrades and remote configuration | <ul style="list-style-type: none"> • Improves average response times for fixing problems • Ensure engineer visits are focussed on activities that can only be carried out on site |

Figure 2. Recommended MPS capabilities



Opportunities abound for MPS providers

The SMB market is a prime opportunity for MPS and workflow solutions as they look to improve productivity, reduce costs and tackle ever increasing security concerns. In the main, SMBs face many of the same challenges as larger organisations, however, they do not have the same resources for overcoming obstacles. The IT department may be small or non-existent, while the tasks involved in building, improving and maintaining a print infrastructure can be multi-faceted and complex.

Quocirca’s recent Print 2025 study revealed that SMBs are dealing with a variety of print management challenges. SMBs continue to rely on print to support their business activities, but in many cases, it remains inefficient and costly. Reducing paper usage is rated as the top print management challenge, particularly amongst larger SMBs, followed by reducing consumables costs and enhancing security. This points to the need for channel organisations to develop offerings beyond simple MPS contracts, that encompass audit, optimisation and document workflow (Figure 3).

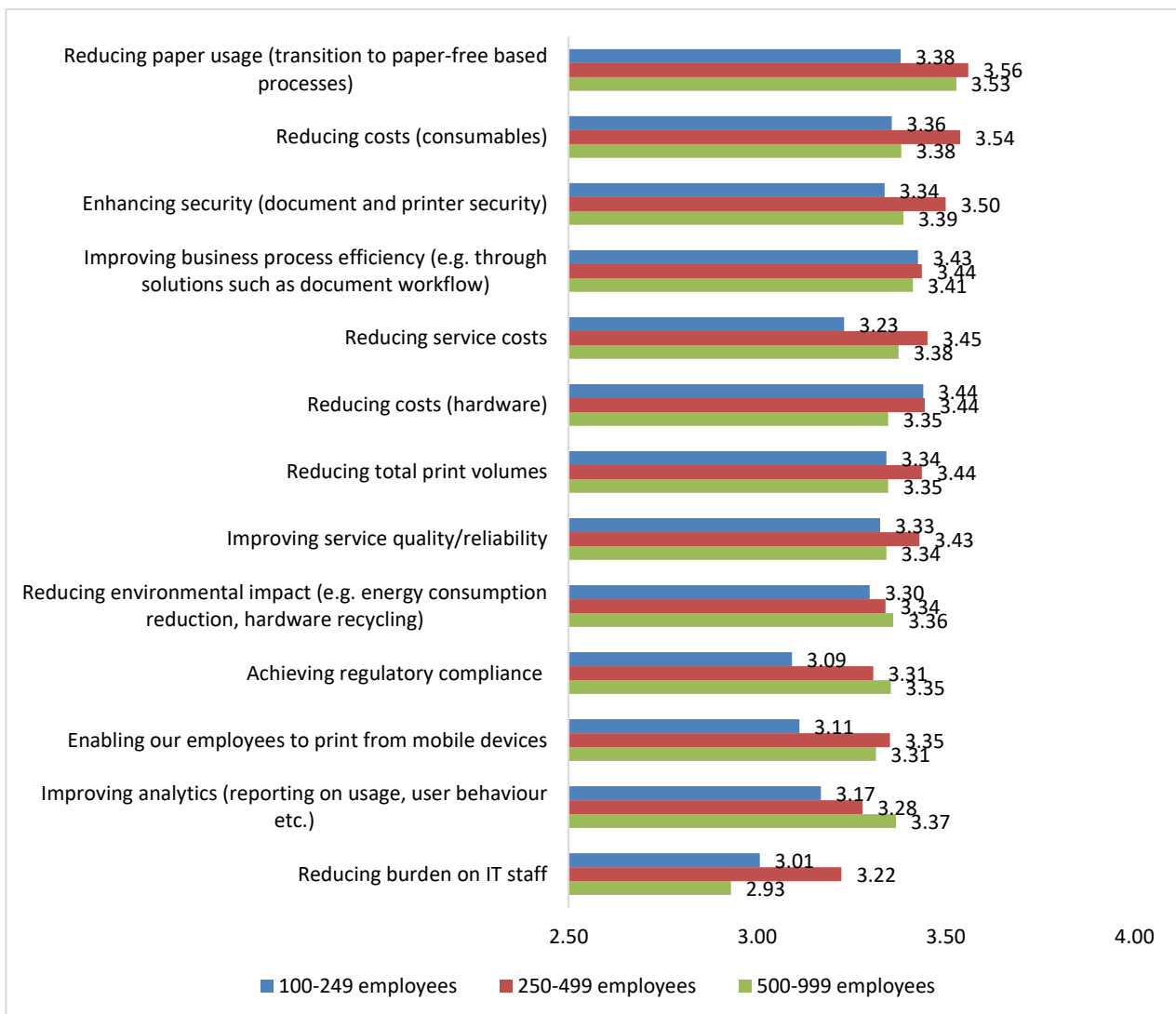


Figure 3. Print management challenges (average score where 1 = not a challenge to 5 = critical challenge) (Quocirca Print 2025 Study)



So, what are businesses looking for from MPS providers? Unsurprisingly service quality comes top, but priorities vary depending on organisation size. Larger SMBs are more likely to value a proactive service to support digital transformation, while security expertise is valued more highly by the smaller SMBs. Security is an opportunity for MPS providers with the expertise and technology to deliver secure print hardware, services and solutions, skill which SMBs typically lack.

As line-of-business (LOB) decision makers become more influential in technology purchasing, channel partners must expand their sphere of influence beyond IT managers. 45% of larger SMBs say that being a strategic partner to both IT and LOB is a top requirement for a print supplier. MPS can be a complex consultative engagement, and channel organisations should be able to offer customers specialised support across hardware, services and software.

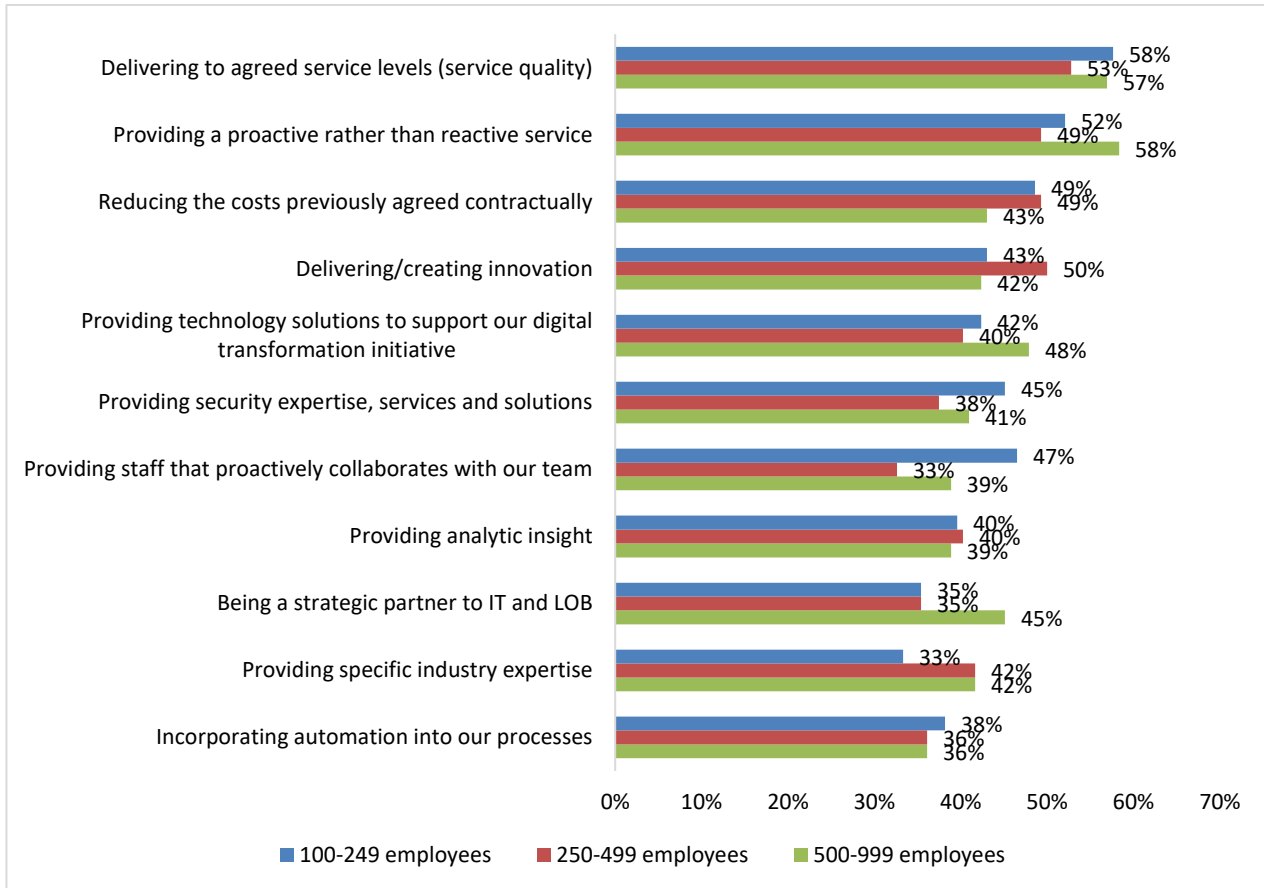


Figure 4. Supplier selection criteria (Quocirca Print 2025 Study)

However, while the channel has attempted to make this shift, results have been inconsistent. The transactional sales approach is not what will drive success for the channel in the future, but rather a consultative service-led model that is supported by specialist skills across industry as well as technology.



Recommendations

The rapidly evolving technology landscape demands that channel organisations move quickly towards a services-led model. Yet transforming a channel business from a reselling infrastructure to provide services-led offerings takes time and investment. Only a minority have successfully made the transition so far – but those that have are reaping the rewards through increased revenue and longer-term customer relationships.

With the right strategy and execution, the channel can navigate disruptive market changes and remain relevant and competitive. If a channel MPS provider can successfully reshape one part of its customer's business, with the right expertise and services, it can expand its influence – particularly as more SMBs look to accelerate digital transformation. For print manufacturers success ultimately depends on having the right partnerships in place and fostering a progressive business culture via the channel. .

For channel organisations, building an MPS business requires careful planning. Moving too fast can impact cash flow, but not moving at all can impact growth and new business. A successful MPS can help build more predictable, recurring revenue streams, augment recurring revenue streams from managed services, and open doors to new customers. Consequently, channel organisations will need to build competencies beyond their traditional expertise. Remaining focused on a single product or service is not the route to being accepted as a long term trusted partner.

To maximise their potential in the market, and overcome challenges during the transition, channel organisations should consider the following:

- **Adapt to the changing market.** Channel organisations must retool to shift from the outdated reselling model and embrace a new role as trusted and strategic advisors to customers. As businesses turn to the channel for guidance and support in addressing challenges, channel organisations will need to be able to deliver consultative-led services. This also means tapping into adjacencies such as digitisation and security, which are increasingly a necessary part of the print proposition.
- **Establish strong vendor relationships.** It's important for channel organisations to establish strong and successful relationships with vendors. They should not only look at the mechanics of an MPS platform or programme, but also evaluate a vendor's ability to engage and develop the partner relationship. Broad support from vendors for lead generation, PR, content creation and more are all necessary to ensure channel is fully equipped to find and win in MPS.
- **Specialise by industry or application.** The shift to margin-rich services means developing industry specific expertise. Investment should be made in the skills needed to deploy and connect a range of technologies to specific industry sectors.
- **Focus on selling business outcomes.** As digital transformation initiatives become further engrained in businesses, channel organisations will need to position offerings as supporting digitisation and digital workflows with both LOB and IT departments. For larger businesses, the channel needs to focus on building skills in selling business outcomes to LOB buyers, while retaining a strong relationship with the IT department.
- **Partner with other service providers.** Partnering with providers that offer complementary skills or products is helps develop a broader portfolio and provides accessing to new expertise. This is particularly important for channel organisations that want to position themselves beyond print as more general managed IT service providers.
- **Monetise.** Channel organisations that invest in software development resources to expand their offerings should consider monetising and building IP through custom built applications. Building a portfolio of wrapped around the MPS business can lead to new opportunities. Consider including assessment or consulting services as well as integration services. With MPS adoption still low in some segments, there is an opportunity to develop a phased approach to MPS expansion.



Vendor landscape

Quocirca has created a snapshot of the positioning of vendors in the European channel MPS market (Figure 9). This was based on vendor survey submissions about their strategies and offerings and existing data on the perception of MPS programmes among SMBs and resellers.

The graphic represents Quocirca's view of the competitive landscape for vendors with channel-led MPS offerings. A "+" denotes an improvement in market position from 2017 and a "++" indicates significant improvement in service portfolio and investment in resources over the same period. The categories are as follows:

- 1) **Leaders:** Vendors with strong strategic vision and a comprehensive MPS service offering. Leaders have made significant investments in their service portfolio and infrastructure and boast strong delivery capabilities.
- 2) **Major players:** Vendors that have established and proven offerings and are continuing to develop their infrastructure for channel partners.
- 3) **Contenders:** Vendors that are investing in resources, infrastructure and partnerships to expand their MPS market coverage regionally or globally

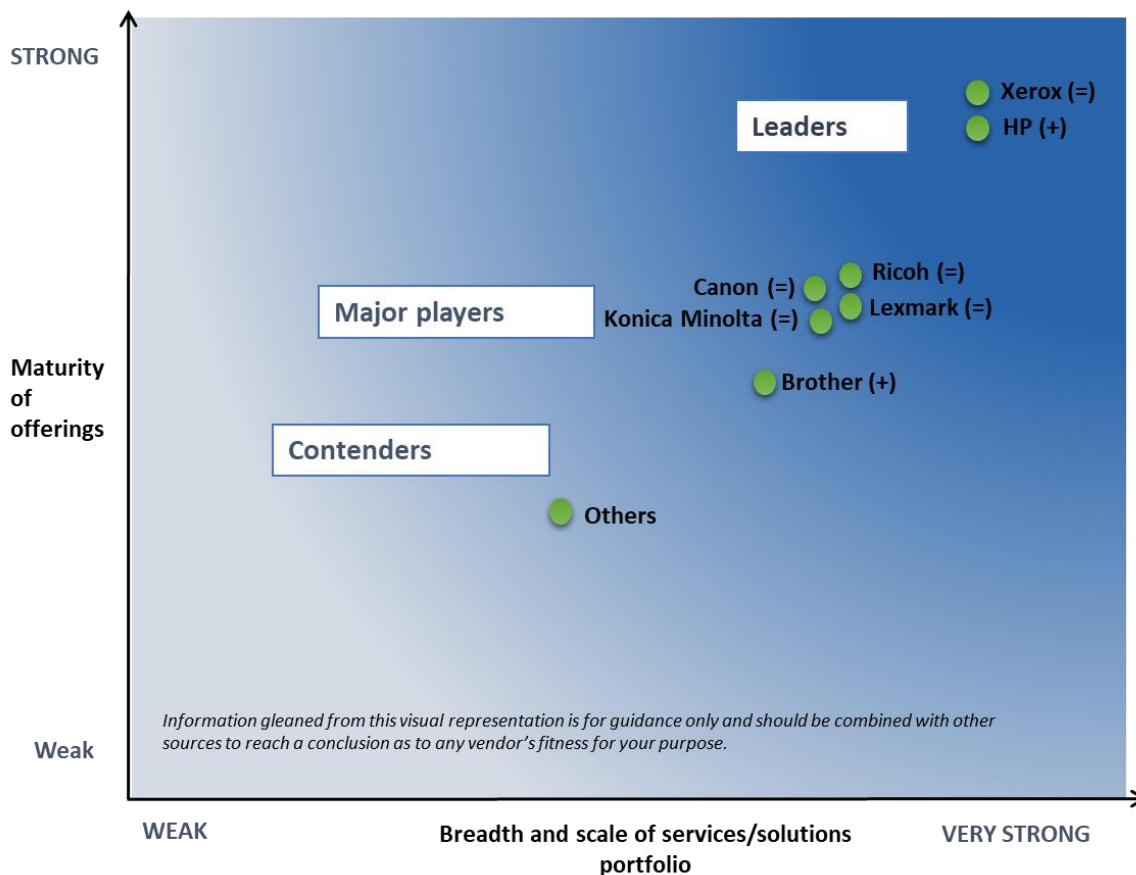


Figure 9. Quocirca European channel MPS vendor positioning, 2018

Please note that this report focuses exclusively on channel programmes from printer manufacturers and does not cover programmes from independent MPS providers. In addition, some vendors have been removed due to insufficient information.



Brother

Quocirca opinion

Brother has made significant progress in building its MPS business since first introducing a basic MPS model in 2011. Although arriving to the market later than some competitors, the company has created an attractive proposition for its reseller partners and their end customers. The MPS offering is a comprehensive, simple, flexible and customer-centric service that caters to the SMB, corporate and public sectors, incorporating the renowned Brother 'At your side' ethos throughout.

Brother's MPS programme offers mono laser printers, colour laser/LED models, A3 business inkjets and high-speed fixed head devices combined with a complete range of print services. There is a range of buying options, including outright purchase, as well as a leasing package that covers hardware and service. Prints are paid for on a 'pay per click' basis or a minimum volume contract.

Rather than adopt a one-size-fits-all solution, Brother's methodology has been to provide partners with a wide range of services that often serve as new recurrent revenue streams. This bespoke approach is designed to support partners in establishing new MPS engagements in companies of all sizes and in all sectors.

As Brother sells MPS exclusively through channel partners, Brother's 'At your side' ethos is the foundation of the MPS model. Partners have access to expert resources, including pre-sales technical support, project management and service delivery teams. They work alongside the reseller to ensure the solution design fits the customer's needs, implementing it in a way that delivers maximum value and minimum disruption.

For simpler MPS agreements, channel partners can access an MPS platform which eliminates the need for additional investment and resources. For more complex MPS engagements, Brother follows a three-stage process that encompasses the assessment, optimisation and ongoing management and reporting of the print environment.

Brother also supports partners who wish to sell their own in-house MPS contracts. Partners can either use their own dedicated administration software or take advantage of Brother's back office systems to manage the contracts.

Brother's MPS programme is currently running in the UK, Ireland, France, Germany, Austria, Belgium, Italy, Spain, Portugal, Switzerland, Finland, Sweden, Norway, Denmark, the Netherlands, Poland, Russia and eastern Europe. The company currently has 2,000 partners across Europe, with a target to double that.

In the four years ending March 2017, the Brother Europe Managed Print Services programme (machines under contract) grew at an annual rate of 200%, with significant success in vertical market segments such as retail, healthcare and banking.

Brother has already made strong inroads in supporting its channel partners' transition to a contractual MPS model. Given the diversity and maturity of the channel, Brother's modular approach to MPS is essential to ensuring channel participation. In 2016, Brother launched a three-year strategic initiative to help grow the company's revenues by moving towards contractual solutions and services. Quocirca expects Brother to gain further traction in MPS as it continues to ramp up its ability in four areas: revenues in contracts and services, a partner base capable of supporting MPS deployments, its brand credentials and permission-to-play, and its capability – which focuses on people, platforms and processes.



MPS offerings

Brother MPS provides a range of print services to customers from SOHOs to global enterprises. The company has a scalable approach to MPS that allows end customers to benefit from basic print services, typically for SOHO/SMB customers, through to comprehensive services suited to larger corporate and enterprise customers.

Brother engages with customers via the channel – comprising resellers, SIs, VARs and solution providers, as well as retail, contract stationer and online reseller partners – and provides a range of sales and marketing support to approved partners, who can deliver a broad range of value-added services to the Brother MPS proposition.

Brother provides its partners with a flexible approach that enables them to select a suitable MPS platform for their customer, for example:

Brother Partner MPS is a platform that provides all the hardware, software and billing tools for more established MPS channel partners who manage MPS contracts for their end customers. It provides resellers with contract management and billing services, allowing a reseller to receive a regular usage invoice from Brother that the reseller can then pass on to their customer. This approach gives the channel opportunity to add maximum value without the need to invest in infrastructure to manage MPS agreements.

Brother MPS provides channel partners with Brother's 'At your side' MPS team, who deliver a managed service to the end customer on behalf of the reseller. The channel partner outsources its MPS requirements to Brother, which allows it to benefit from a range of hardware and flexible services tailored to fit the needs of each customer – from SOHO/SMB to strategic vertical markets – without making any investment in infrastructure or resources.

Brother MPS is built on four key pillars: flexibility, simplicity, speed and availability of experts. Easy for channel partners to implement, it is a customer-centric model that works for end-users.

Brother's MPS offer is wholly bespoke, designed to enable partners and their customers to make the most out of managed print. Each solution is specifically designed to suit individual requirements.

Brother MPS offers three, four or five year lease options, with shorter periods established by special agreement. The programme allows end-users to lease the hardware and pay for supplies on a 'per click' basis, so they only pay for what they print. Hardware and service packs are financed, ensuring partners receive the total amount after installation, and Brother guarantees 100% of all supplies business for the duration of the contract, enabling resellers to capture all supplies profit without increasing overheads.

MPS infrastructure and tools

Partners benefit from Brother's three-stage methodology for delivering MPS:

- **Assessment:** assess the customer's current print environment and understand future customer needs
- **Transition:** the change and implementation of a new MPS agreement
- **Optimisation:** continually improving the service via continuous service delivery management to ensure maximum value is delivered.

During the assessment stage, Brother's end-user sales and pre-sales technical teams work alongside the customer and partner to ensure data is collected and customer requirements are fully understood and addressed. After assessing the customer's printing needs, Brother designs a tailor-made solution that can include mono and colour network devices.

Brother's project management team supports the transition from the customer's original system to the new Brother MPS solution. Ongoing optimisation of the solution is led by a Brother Service Delivery Manager, who provides the reports and performance updates necessary to ensure the customer benefits from a modern, intelligent MPS system that integrates seamlessly and cost-efficiently with their requirements.



Brother MPS provides partners with an uncomplicated way to create customer stickiness and generate recurrent revenue streams by delivering tailored solutions and services specific to each customer's needs. These are the key features:

- Delivery and installation is included as standard.
- Full visibility over costs and billing is flexible. Customers can be invoiced monthly, quarterly or bi-annually and the contract is based on actual usage with no mandatory minimum volume or fixed fees.
- The Service Pack can either be paid upfront or included in the per page click cost.
- A simple web portal manages meter reads and provides customers with the ability to view individual device usage, order supplies or make a service request. Response times from authorised service partners are agreed upfront.
- Consumables are recycled continuously, and hardware is recycled at the end of the lease.

Partners can access Brother's end-user sales and pre-sales technical teams, as well as MPS specialists, to benefit from a range of tailored support services from project management to installation and recycling. These services can be delivered in-house or by the channel partners themselves, creating opportunities for partners to build more margin and develop additional revenue streams within a Brother MPS.

Brother also has partnerships with third-party maintainers/service providers who provide some on-site MPS services. Multi-vendor maintenance and support and a help desk resource are also available to partners.

Solutions

Brother has partnerships with over 50 software suppliers and will assist partners in more complex solution sales.

Available proprietary and third-party solutions include:

- **Assessment:** Brother BRAdmin Professional, Brother Meter Read Tool, Brother MPSDrive, AssetDB and Print Audit 6 RAK
- **Fleet optimisation and deployment planning:** Brother MPSDrive and AssetDB
- **Device management:** Brother BRAdmin Professional, Brother Meter Read Tool, Brother Mass Deployment Tool, JetAdvice and PrintFleet
- **Document accounting/cost control:** PrintSmart SecurePro
- **Security:** Secure Function Lock, Custom UI, SecurePrint, SecurePrint+, PrintSmart SecurePro, embedded solutions from Papercut, Safecom, One Q, etc
- **Remote support:** Brother BRAdmin Professional, Brother Meter Read Tool, Brother Mass Deployment Tool, PrintFleet and JetAdvice
- **Proactive supplies management:** Brother BRAdmin Professional, Brother Meter Read Tool, PrintFleet and JetAdvice
- **Mobile printing:** Brother iPrint&Scan, PrintSmart SecurePro, Google/Apple services, embedded solutions from Papercut, Safecom, One Q, etc.

Sales and marketing support

Brother's MPS is delivered 100% via its channel. Brother fully supports partners who wish to operate their own managed print contracts and provides sales training and tools. It also conducts lead generation initiatives, giving the enquiries received to its partners to pursue.

Brother's commercial and public sector end-user sales teams are also available to work with channel account management teams to develop new MPS sales opportunities.



About Quocirca

Quocirca is a primary research and analysis company specialising in the business impact of information technology and communications (ITC). With worldwide, native language reach, Quocirca provides in-depth insights into the views of buyers and influencers in large, mid-sized and small organisations. Its analyst team is made up of real-world practitioners with first-hand experience of ITC delivery who continuously research and track the industry and its real usage in the markets.

Quocirca works with global and local providers of ITC products and services to help them deliver on the promise that ITC holds for business. Quocirca's clients include Oracle, Microsoft, IBM, O2, T-Mobile, HP, Xerox, EMC, Symantec and Cisco, along with other large and medium-sized vendors, service providers and more specialist firms.

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