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Office Scanning in the U.S. Market - A Multi-Client Study

- **Analyze** the key differentiators in scanning methods between MFPs and scanners
- **Profile** customers' purchasing decisions and methods when scanning becomes a primary feature
- **Forecast** the future and size up today's market for electronic scans (page volumes)

InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. Additional information about InfoTrends is available on the Web at www.infotrends.com.

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Who Should Subscribe?

Various market participants will benefit from information on the role, motivating factors, and user preferences related to scanning, including:

- MFP OEMs
- Scanner OEMs
- ISV - Software Companies
- Channel Participants

Getting Started

To learn more about the study or to sign up as a participant, please call Scott Phinney at 781-616-2100 ext. 123 or e-mail scott_phinney@infotrends.com.

New Opportunities & Challenges for the Office Environment

The Scanning Pie has Grown

Because of the proliferation of MFP devices in the office, the accessibility to scanning has increased. Awareness and use of the MFP scanner has increased because of the ease of integrated solutions and openness to share the device. As workflow solutions begin to play a greater role in the office environment, scanning and scanner technology are becoming vital elements for knowledge workers. The only question is, who will capture the capture market?

InfoTrends believes that a new market dynamic will emerge as customers place greater importance on scanning technology. MFP vendors will be presented with new opportunities to capture revenue streams from the distributed scanner market by enhancing scanning functions and solutions on their current devices. Stand-alone scanning vendors are also taking advantage of this shared approach and improved accessibility to scanning by developing networked scanners with large-screen displays, stealing some of the best scanner features of the MFP but delivering the product at an attractive price.

Opportunities for MFP Vendors

The convergence of scanning technologies into MFPs was once a check-off item because it was available. Now it can be an interesting differentiator for vendors, as well as a possible revenue generator.

In a recent InfoTrends study, 70% of respondents reported using MFPs for scanning in U.S. business environments. This number has risen significantly since our 2004 survey, when only 48% of respondents indicated using MFPs for scanning. Customer interest in utilizing the scanning function that is present in equipment they already use (and which is distributed around the office) is driving interest in this market. Revenue opportunities for MFP vendors with the right scanning solutions might easily be overlooked.

MFP scanning could continue to be used largely for low-volume or ad-hoc applications rather than high-volume applications, primarily because sharing a device with those who are copying and printing is not practical in a high-volume situation.

Opportunities for Scanner Vendors

Single-function scanner devices currently perform in a vastly superior manner to MFP devices. Single-function scanners often provide more robust and diversified paper handling, better image quality, and automatic adjustments, as

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well as advanced flexibility to integrate with the software applications a company uses. Other attributes of single-function scanners, such as user conformity when scanning important documents and attentiveness to accurate and complete document capture, security, and privacy, will likely sway many companies to employ single-function scanners for use by a smaller pool of operators.

Interestingly, as the adoption of networked MFP scanning devices is becoming mainstream, scanner vendors are also entering the networked device market. Customers can now purchase a shared networked scanning device with more robust scanner features at one third of the price. These products have more features, similar to those of the MFP scanner (shared/networked, LCD touch front panel, solutions enabled/ integrated, etc.). These devices have the potential of shifting scanned pages from MFP networked devices because of accessibility and price.

Challenges for Both

Understanding customer's current preferences for either technology – how, what, when, where, and at what price – is the most challenging obstacle for MFP and scanner vendors. InfoTrends' new multi-client study, *The Future of Distributed Scanning – The MFP vs. Scanner Tipping Point*, will take an in-depth look at this evolving market. In the report, we will discuss the impact that changing customer needs are having on MFP and scanner vendors, as well as the resulting opportunities and challenges.

Project Objectives

- Understand the future and importance of scanning for the MFP and stand alone scanner markets
- Outline the key differentiators in scanning methods between MFPs and scanners
- See if traditional stand alone scans could be displaced by MFPs and, similarly, if MFP scans will be displaced by stand alone scanner devices
- Determine what customers are willing to pay or not pay for in scanning – gauge feature and function interest in a stand alone product or MFP for future products and the price they are willing to pay for those technologies
- Examine customers' purchasing decisions and methods when scanning becomes a primary feature
- Evaluate what channels will be able to deliver these future technologies most effectively
- Determine what the market today is for electronic scans (Page Volumes) and what the scan forecast is for the future

Market Research

This study will use a combination of primary and secondary research to determine the market requirements and opportunities for MFPs and standalone scanners within corporations of various sizes.

Secondary Research

InfoTrends has conducted extensive research in the office document market space. Relevant research reports and forecasts will be leveraged as part of this study. We will also thoroughly examine existing market information from a variety of sources, including government and industry association data and published reports.

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Primary Research

Structured Survey with End Users (400)

InfoTrends will conduct a series of structured surveys to develop industry statistics on current use and future plans concerning scanning solutions. We will obtain data on adoption plans, unmet needs, new service requirements, and other factors affecting purchases. The surveys will enable detailed market sizing, projections of demand, and other quantitative information that is critical for business planning.

Personal Interviews with End Users (approximately 10)

InfoTrends will conduct in-depth interviews with qualified end users that are currently using scanning solutions including MFP and standalone devices. These interviews will provide insight into the driving factors for using scanning solutions, the expected and actual benefits, and the unmet needs of companies that have experience using these solutions.

Personal Interviews with Dealers (approximately 10)

InfoTrends will conduct in-depth interviews with a mix of IT and copier dealers that are currently offering scanning solutions. These interviews will address questions about the dealers' experiences with selling and implementing scanning solutions.

Personal Interviews with OEMs

InfoTrends will conduct in-depth interviews with leading OEMs that have scanning solutions as part of their product portfolios. The interviews will provide subscribers with information related to trends in this channel related to selling and implementing scanning solutions.

Analysis & Project Deliverables

InfoTrends will conduct extensive analysis of the desk research, personal interviews, and structured survey to develop a comprehensive understanding of the opportunities and issues related to scanning solutions. Clients will receive a combination of reports, presentation materials, and research data for senior management, product managers and planners, and sales and marketing executives. These materials will include:

- An executive summary that addresses key issues, findings, and overall recommendations
- A PowerPoint style report with text, charts, and graphs addressing the objectives of the study
- A set of presentation-style overheads for internal communication of the research results
- Market forecast with tables, charts, and assumptions
- Data tabulations

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Project Schedule

The market research for the study will start in June 2008. Analysis reports will be written starting in August/September 2008, and the final report will be published in October 2008.

The schedule is as follows:

May 30, 2008	Last date for charter subscribers
June 2008	Web survey deployed
July 2008	In-depth interviews
August/September 2008	Data tabulations and analysis work
December 2008	Final report delivered

Project Fees

For clients that sign up before May 30, 2008, the participation fee is \$11,995. Clients that sign up early can also provide input and review the interview guides. After May 30th, the price of the study is \$13,995. A personal presentation is available for an additional \$2,000 plus travel expenses.

Terms and Conditions

Liability for Advice

Although reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

Copyrights

InfoTrends retains all copyrights. The reproduction of any materials is prohibited without written consent from InfoTrends.

Confidentiality

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to re-use any non-proprietary information as part of its ongoing analysis of the office automation and printing and publishing industries.

Timely Delivery

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

Terms

One half of fee upon initiation and one half upon report delivery.

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Authorization Form

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For more information on the study or how to order, please send an e-mail to sales@infotrends.com.

Please enter my order as follows (fax completed form to +1 781 616 2121):

- | | |
|------------------------------------------------------------|------------------------------|
| <input type="checkbox"/> Early subscriber (before 5/30/08) | \$11,995 |
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