KONICA MINOLTA



CLOUD AND INFRASTRUCTURE REPORT 2026

THE HYBRID REALITY
Accelerating cloud printing adoption

Research by Omdia, commissioned by Konica Minolta Australia



01 EXECUTIVE SUMMARY

HYBRID HAS BECOME THE OPERATING REALITY

Print infrastructure across Australia and New Zealand is changing, though the transition is not a simple move from on-premises systems to cloud.

Most organisations now operate somewhere between the two. 58 per cent of Australian organisations and 54 per cent of New Zealand organisations use a hybrid mix of on-premises servers and cloud. Primarily cloud-managed environments remain a minority, at nine per cent in Australia and 14 per cent in New Zealand.

The shift towards greater cloud use is becoming clearer. Over the next 12–24 months, 42 per cent of Australian organisations plan to move either from on-premises to hybrid or from hybrid to primarily cloud. In New Zealand, the equivalent figure is 38 per cent.

The reasons are increasingly operational. Reducing IT workload and print server management is one of the strongest drivers of cloud print adoption in both markets. Australian organisations also place strong emphasis on supporting hybrid and remote work, while New Zealand organisations are more focused on lowering total cost of ownership.

The transition is taking place within practical constraints. Budget is the leading barrier to broader cloud print adoption, while data sovereignty and location remain important considerations. On average, organisations in both countries allocate more than half of their IT budgets to maintaining and operating existing systems and processes.

The findings point to a measured transition. Hybrid environments dominate today, while organisations expect to increase their use of cloud over the next 12–24 months.

KEY FINDINGS

Five signals emerged from research with 408 IT and business decision-makers across Australia and New Zealand, conducted between March and April 2026.

58% AU / 54% NZ
currently use a mix of on-premises and cloud.

42% AU / 38% NZ
plan to move from on-premises to hybrid or from hybrid to primarily cloud over the next 12–24 months.

47% AU / 40% NZ
identify reducing print server management and IT workload as a leading driver of cloud print adoption.

50% AU / 42% NZ
identify budget constraints as the leading barrier to broader cloud print adoption.

55.5% AU / 53.7% NZ
average share of IT budgets allocated to maintaining and operating existing systems and processes.

02 HYBRID DOMINATES THE PRINT ENVIRONMENT

MOST ORGANISATIONS ALREADY OPERATE ACROSS ON-PREMISES AND CLOUD ENVIRONMENTS

Hybrid is the most common print deployment model across both Australia and New Zealand.

58 per cent of Australian organisations operate a mix of on-premises servers and cloud, compared with 30 per cent that remain primarily on-premises and nine per cent that are primarily cloud-managed.

New Zealand follows a similar pattern. 54 per cent operate hybrid environments, 26 per cent remain primarily on-premises and 14 per cent are primarily cloud-managed.

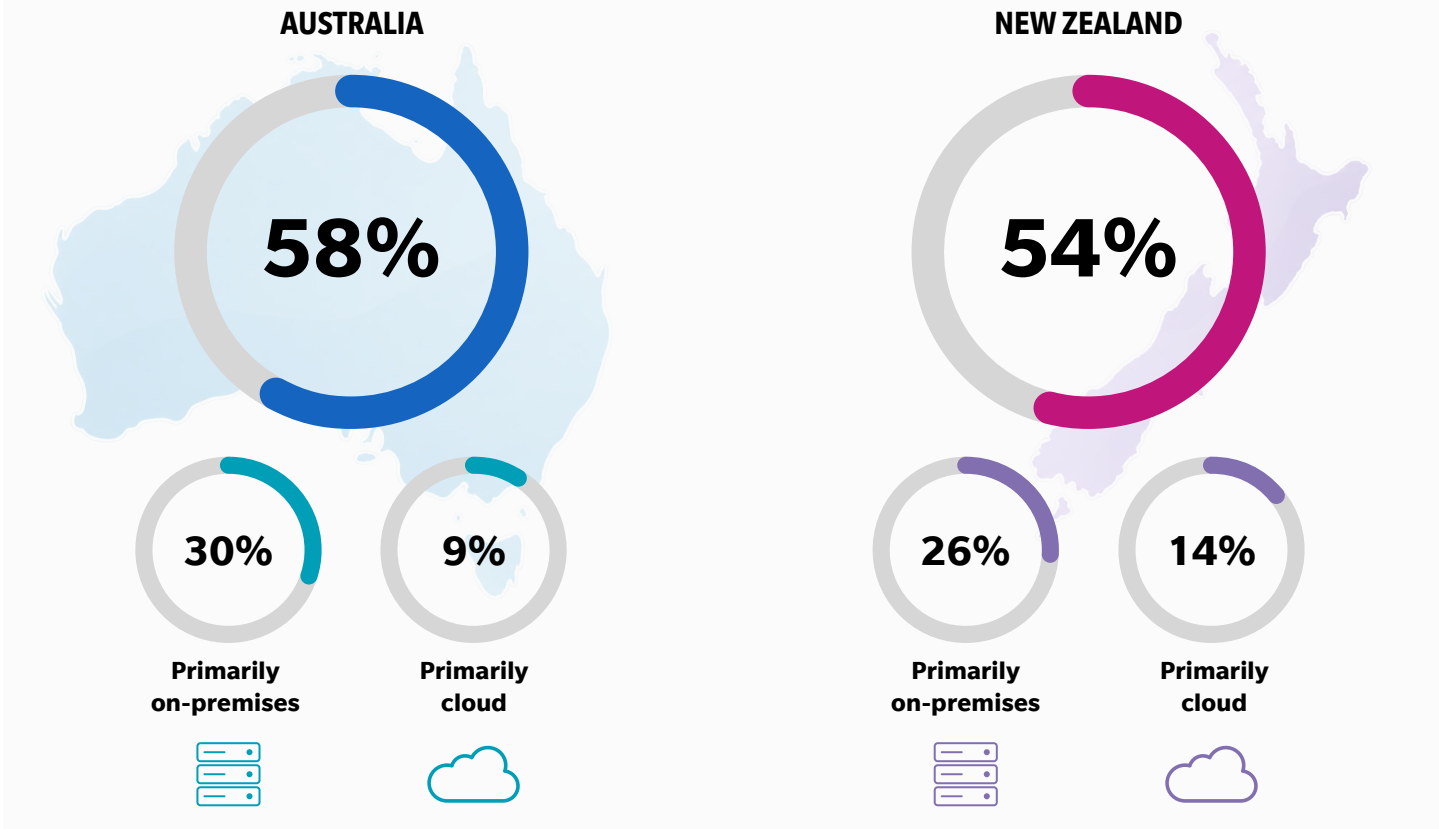
The figures reflect how technology environments tend to evolve in practice. Existing print infrastructure does not disappear when new cloud capabilities are introduced. Different sites, workloads, applications and user requirements can continue to depend on different delivery models.

Hybrid is therefore more than a transition point. For many organisations, it is the current operating model. The challenge is deciding where established infrastructure should remain and where cloud services can simplify management, improve flexibility or better support changing workplace requirements.



WHAT THIS MEANS:

Organisations need support managing hybrid environments today, not only planning for future cloud migration. The priority is understanding which parts of the print environment should remain on-premises, which can move to cloud, and how both models can be managed together without adding complexity.



03 CLOUD ADOPTION IS PROGRESSING IN STAGES

THE ROADMAP POINTS TOWARDS GREATER CLOUD USE

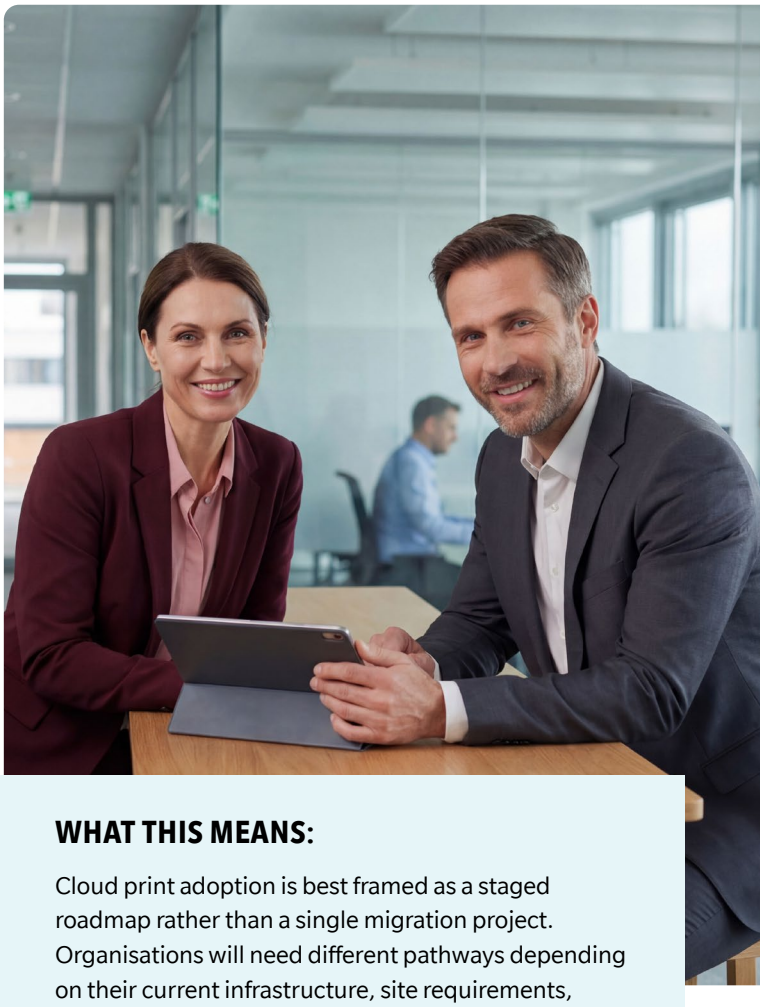
In Australia, 21 per cent plan to move from primarily on-premises print to hybrid, while another 21 per cent plan to move from hybrid to primarily cloud. A further 13 per cent are already primarily cloud and expect to optimise their environments further.

New Zealand is moving in the same direction. 18 per cent plan to move from on-premises to hybrid and 19 per cent from hybrid to primarily cloud. A further 10 per cent are already primarily cloud and expect to optimise further.

At the same time, 29 per cent of Australian organisations and 28 per cent of New Zealand organisations expect to remain primarily on-premises.

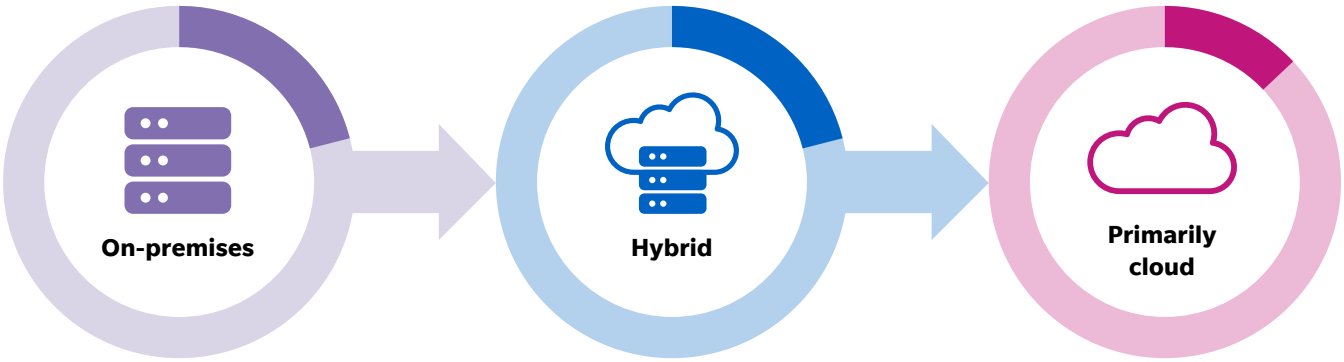
The roadmap therefore shows movement rather than replacement. Some organisations are taking their first step towards hybrid. Others are extending an existing hybrid environment further into cloud. A substantial group will continue operating primarily on-premises.

Cloud adoption is increasing, though the pace and pathway depend on each organisation's existing infrastructure and operational requirements



WHAT THIS MEANS:

Cloud print adoption is best framed as a staged roadmap rather than a single migration project. Organisations will need different pathways depending on their current infrastructure, site requirements, applications and risk profile.



Plan to move from on-premises to hybrid		Plan to move from hybrid to primarily cloud		Already primarily cloud and plan further optimisation	
21% AU	18% NZ	21% AU	19% NZ	13% AU	10% NZ



04 THE CASE FOR CLOUD IS BECOMING OPERATIONAL

IT TEAMS ARE LOOKING FOR LESS INFRASTRUCTURE TO MANAGE

Cloud print adoption is increasingly being considered in terms of the work required to operate the print environment.

In Australia, improving support for hybrid and remote work is the leading adoption driver, cited by 49 per cent of organisations. Reducing IT workload and print server management follows closely at 47 per cent.

The picture is different in New Zealand. Lower total cost of ownership is the leading driver at 46 per cent, followed by reducing IT workload and print server management at 40 per cent.

These differences reflect the pressures organisations are trying to address. Australian organisations place greater weight on supporting distributed workplaces, while New Zealand organisations show a stronger cost focus. Both markets, however, identify the management burden placed on IT teams as an important consideration.

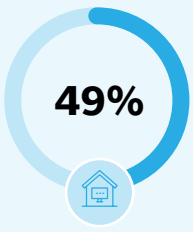
Print infrastructure can require IT teams to maintain servers, drivers, queues and supporting systems across multiple locations. As workplace environments become more distributed, that management effort can become more visible.

Cloud print is therefore increasingly being assessed through an operational lens: how much infrastructure needs to be managed, how easily users can be supported and whether the environment can adapt as organisational requirements change.

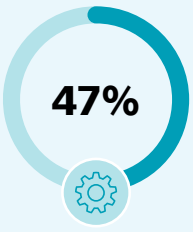
WHAT THIS MEANS:

The value of cloud print should be positioned around operational improvement. For IT teams, the strongest message is not simply cloud for cloud's sake, but reducing infrastructure management, improving user support and creating a print environment that can adapt as workplace needs change.

AUSTRALIA

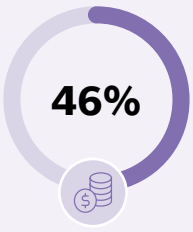


Improve support for hybrid and remote work

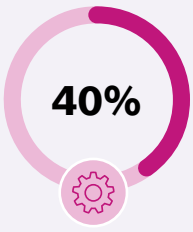


Reduce IT workload and print server management

NEW ZEALAND



Lower total cost of ownership



Reduce IT workload and print server management

REDUCED IT WORKLOAD IS A KEY DRIVER FOR BOTH AUSTRALIA AND NEW ZEALAND

05 PRACTICAL CONSTRAINTS ARE SHAPING THE PACE OF CHANGE

MODERNISATION MUST COMPETE WITH EXISTING PRIORITIES

The movement towards cloud is clear, though organisations continue to balance migration with financial, operational and infrastructure considerations.

Budget is the most frequently cited barrier to broader cloud print adoption, identified by 50 per cent of Australian organisations and 42 per cent of New Zealand organisations. Data sovereignty and location concerns also feature prominently, cited by 39 per cent in Australia and 41 per cent in New Zealand.

Organisations already operating cloud print environments also report practical challenges. Data privacy and residency concerns are the leading operational challenge in both countries, at 26 per cent. Australian organisations report challenges associated with managing cloud and on-premises infrastructure together, while New Zealand organisations show greater concern about reliability in locations with limited bandwidth.

These pressures sit within a wider IT investment picture. Australian organisations allocate an average of 55.5 per cent of their IT budgets to maintaining and operating existing systems and processes, leaving 44.5 per cent for innovation and transformation. In New Zealand, the split is 53.7 per cent for existing operations and 46.3 per cent for innovation and transformation.

For IT teams, modernising print therefore competes with the cost and effort required to keep existing environments running.

The pace of cloud print adoption will depend on how organisations balance these priorities. The business case must account for the environment that already exists as well as the operational benefits expected from changing it.

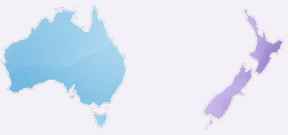
WHAT THIS MEANS:

Cloud print conversations need to acknowledge budget, data requirements and existing infrastructure from the start. A practical business case should show where cloud can reduce management effort, support compliance needs and deliver value without requiring unnecessary disruption.

TOP BARRIERS TO PROGRESS

BUDGET CONSTRAINTS ARE THE LEADING BARRIER, SUPPORTED BY DATA SOVEREIGNTY CONCERNS.

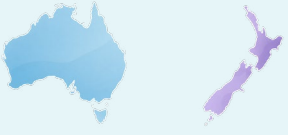
Budget constraints
Are the leading barrier



50% AUSTRALIA

42% NEW ZEALAND

Data sovereignty and location concerns



39% AUSTRALIA

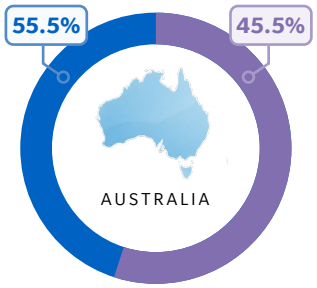
41% NEW ZEALAND

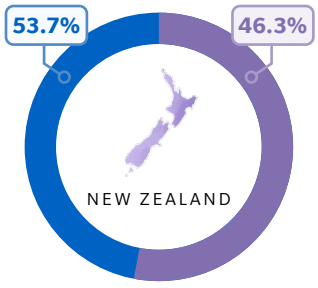
IT BUDGET ALLOCATION

OVER HALF OF IT BUDGETS ARE SPENT ON MAINTAINING EXISTING SYSTEMS, WITH THE REMINDER ALLOCATED TO INNOVATION.

Existing operations
Maintaining existing systems and processes

Innovation and transformation
New technology, digital initiatives and transformation





Organisations are navigating budget constraints while balancing the need for innovation and long-term transformation.



06 REMERGING THEMES

FIVE THEMES EMERGE FROM THE RESEARCH

01

HYBRID IS THE CURRENT OPERATING MODEL

Most organisations already combine on-premises and cloud, making hybrid the dominant deployment model across both markets.

02

CLOUD ADOPTION IS PROGRESSING IN STAGES

The roadmap shows continued movement from on-premises to hybrid and from hybrid to primarily cloud over the next 12–24 months.

03

IT WORKLOAD IS SHAPING THE CLOUD CONVERSATION

Reducing print server management and IT workload is one of the strongest adoption drivers in both Australia and New Zealand.

04

COST REMAINS A PRACTICAL CONSTRAINT

Budget is the leading barrier to broader adoption, while New Zealand organisations also place particular emphasis on total cost of ownership when considering cloud.

05

EXISTING INFRASTRUCTURE CONTINUES TO INFLUENCE INVESTMENT

On average, organisations in both markets dedicate more than half of their IT budgets to maintaining and operating current systems and processes.

07 CONCLUSION

THE PATH TO CLOUD IS BECOMING CLEARER

Print infrastructure across Australia and New Zealand is moving towards greater cloud adoption, though the research does not point to a single destination or timetable.

Hybrid environments dominate today, with more organisations expecting to extend cloud use over the next 12 months, either by moving from primarily on-premises infrastructure to hybrid or taking an existing hybrid environment further towards cloud.

Organisations are pursuing this change for practical reasons, including reducing print management workloads, supporting changing workplace requirements and, particularly in New Zealand, managing total cost of ownership. Budget, data sovereignty and existing infrastructure continue to influence the pace of change.

The findings suggest that print modernisation is becoming less about choosing one deployment model over another and more about deciding where cloud can reduce complexity, support users and deliver measurable value at each stage of the organisation's technology roadmap.

ABOUT THIS RESEARCH

All respondents held direct involvement in buying or specifying print, security, or cloud solutions, from CIOs, CTOs and CISOs to IT managers, infrastructure leads and risk, finance, and line of business leaders.

Industries represented: professional services, financial services, government and public sector, manufacturing, healthcare, education, retail and wholesale, media and technology, and utilities.

408

IT and business decision-makers surveyed

2

markets, Australia and New Zealand

50–5k+

employee organisation size range

2026

fielded March–April, online

Omdia by informa techtarget

ABOUT OMDIA

Omdia is a technology research and advisory firm focused on helping technology companies and enterprise decision-makers navigate the connected digital economy. Through a global network of analysts, Omdia delivers expert analysis and strategic insight across IT, telecoms, and media sectors. Omdia is part of Informa TechTarget, listed on the London Stock Exchange.

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ABOUT KONICA MINOLTA AUSTRALIA

Konica Minolta Business Solutions Australia Pty Ltd is a market-leading provider of trusted technology solutions to help Australian organisations keep pace with the needs of the future workplace through innovation and investment technology solutions that leverage the technology of tomorrow, today.

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