



## Color End-User MFP Survey for 2010

In this issue of *The Office Products Analyst* we are reporting the results of our Color MFP End-User Survey. This is the first in a two part series on color products. The next color issue will include the Annual Color Reliability Study, which will summarize the results of surveys conducted via telephone with service managers from dealerships across the country. It will represent their perceptions of the reliability of the color products that they sell and service. This issue addresses results of surveys conducted via the telephone with those who use and administer color products within their organizations.

Through our extensive research experience, we've noticed that there are significant differences between the data obtained from a dealer-based sample and that of a sample consisting strictly of end-users. For example, our End-User Survey includes a broader range of brands and models. End-users tend to express their opinions and perceptions more freely, particularly where issues such as service responses are addressed. Finally, our End-User Survey includes brands that are not only serviced through the dealer channel, but by direct organizations and independent service organizations as well.

The Color Reliability Study lets us present reliability ratings from those dealerships actually providing service for specified models. In that survey, service managers often use actual service documentation, rather than a "gut feel" perception. In comparison, dealers may tend to be a bit biased and stand by their brand, while users tend to base their perceptions on their most recent service experience.

This Color MFP End-User Study is based on 386 verified responses, 80.8% of those respondents own a Color MFP, of which include 212 installed color copiers/multifunctional products (MFPs)/All-In-Ones (AIOs). Note that the majority of color copier products can be connected to a computer or a network as an option, allowing them to function as a printer as well. This qualifies them as MFPs or AIOs. However, in certain data sets, full-color MFPs/AIOs that are not connected to a PC or a LAN, are designated as standalone units. Throughout the rest of this report, the phrase "MFP" refers to both MFPs and AIOs.

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As you review the data, please note that some columns have no entries, indicated by a “— — —”. If a particular response category had a statistically insignificant number of responses, we did not calculate the results. This should not be confused with an entry of “0.0” which indicates that there were no responses in a particular cell. We deemed as significant those instances where an item received no response from a significant number of respondents and displayed this fact as a zero entry.

Table 1 shows the full-color copier and printer brand distribution of this sample, broken out by establishments. These data indicate the percentage of establishments that are currently using each brand. Multiple responses were allowed as many user sites with multiple installations have more than one brand. A respondent reporting only one unit of a particular brand would be weighted in the establishment data exactly the same as a respondent reporting multiple installations of the same brand.

In the first column, Copier/MFP, we present the data that indicates the percentage of establishments currently using each brand for their full-color copier/MFP systems, which may or may not be connected to a PC or network. The third column, Printer, presents the same information for those brands used for their full-color printers. In the Copier/MFP column, Hewlett-Packard is the brand used most by full-color copier/MFP users (33.8%). None of the other brands come as close to this percentage. Xerox, with a leading share in last year’s study, drops to fourth place with a 12.2% establishment share. Among the Printer users, Hewlett-Packard’s representation is significantly higher than their MFP sample share (45.8%). Xerox color printers are a distant second, used in 11.3% of the establishments surveyed.

	Copier/MFP	Avg. # Of Units	Printer
Hewlett-Packard	33.8%	1	45.8%
Canon	14.5%	1	10.8%
Brother	12.5%	1	3.8%
Xerox	12.2%	1	11.3%
Konica Minolta	7.1%	1	5.7%
Ricoh	5.0%	1	5.7%
Epson	4.2%	1	3.3%
Kyocera (Mita)	4.2%	1	1.4%
Dell	3.6%	1	1.9%
Lexmark	3.0%	1	2.4%
Sharp	2.7%	1	1.4%
Lanier	1.8%	1	0.5%
Samsung	1.5%	1	0.9%
Kodak	0.9%	1	1.9%
Toshiba	0.9%	1	0.5%
Gestetner	0.6%	2	1.9%
Oki Data	0.6%	NA	0.0%
Panafax/Panasonic	0.6%	1	0.5%
Savin	0.6%	1	0.5%

\*Median Values Used  
Source: OPA

Table 2 indicates how long the user’s primary color product has been installed. In our sample, the average length of time a full-color unit has been installed is 26.7 months (median value), among all brands represented. Canon color printer users

Universe.....	26.7
Canon.....	33.7
Hewlett-Packard.....	30.1
Ricoh Family Group.....	25.0
Xerox.....	24.2
Konica Minolta.....	18.1

Source: OPA

indicate the highest number of months installed (33.7).

The data presented in Table 3 calls out the most common channels of distribution for the full-color units included in this sample. Business Equipment Dealer is the primary acquisition channel for full-color systems (23.7%). This is especially significant in the Konica Minolta brand group where 75.0% of respondents indicated dealers as their acquisition channel. Note that many users (11.9%) feel that they have purchased their units from the manufacturer when, in fact, they have not. This makes the integrity of the indirect channel even more important. More than 16% of users did not know the source for their product.

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
Business Equipment Dealer	23.7%	36.8%	9.3%	75.0%	50.0%	37.5%
Office Supply Store	18.6%	21.1%	30.7%	0.0%	8.3%	0.0%
Direct From Manufacturer	11.9%	10.5%	6.7%	8.3%	8.3%	37.5%
Discount Store	8.5%	5.3%	12.0%	0.0%	0.0%	0.0%
Retail Store	7.9%	5.3%	12.0%	0.0%	0.0%	0.0%
Internet	4.0%	10.5%	2.7%	0.0%	0.0%	0.0%
Wholesaler	4.0%	0.0%	4.0%	0.0%	8.3%	8.3%
Computer Retail Store	2.8%	0.0%	2.7%	0.0%	0.0%	4.2%
Auction	0.6%	0.0%	0.0%	0.0%	0.0%	4.2%
Gift	0.6%	5.3%	0.0%	0.0%	0.0%	0.0%
Mail Order	0.6%	0.0%	1.3%	0.0%	0.0%	0.0%
Newspaper Ad	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Don't Know	16.4%	5.3%	18.7%	16.7%	25.0%	8.3%

Source: OPA

While the first part of this report summarized the full-color copiers and MFPs across the entire enterprise, this next section focuses only on the full-color units used most often by the respondent. To make the data more meaningful, we broke them down by brand. The brands listed within each table are the brands that had the highest representation among users in our sample. The Universe and Brand data are comprised of only color units that are connected to a computer or a network.

In Table 4 we asked where their next color MFP would be made, those actually considering acquisition indicated they would obtain the unit from an Of-

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
Office Supply Store	21.3%	27.8%	32.9%	0.0%	9.1%	0.0%
Business Equipment Dealer	16.0%	16.7%	6.8%	50.0%	54.5%	18.2%
Direct From Manufacturer	11.2%	11.1%	8.2%	0.0%	9.1%	45.5%
Discount Store	7.7%	5.6%	8.2%	0.0%	0.0%	4.5%
Internet	4.1%	11.1%	1.4%	0.0%	0.0%	0.0%
Retail Store	4.1%	0.0%	5.5%	0.0%	0.0%	0.0%
Computer Retail Store	2.4%	0.0%	2.7%	0.0%	0.0%	0.0%
Copier Dealer	1.8%	0.0%	0.0%	8.3%	0.0%	4.5%
Mail Order	0.6%	0.0%	1.4%	0.0%	0.0%	0.0%
Wholesaler	0.6%	0.0%	1.4%	0.0%	0.0%	0.0%
Don't Know	30.2%	27.8%	31.5%	41.7%	27.3%	27.3%

Source: OPA

Office Supply Store (21.3%). Dealers, the primary source for existing equipment dropped to second place in terms of frequency of mention (16.0%).

The trend in the imaging industry is toward lower cost A4 (letter-sized output) systems. As prices continue to decline, the percentage of equipment purchased increases. This year, in Table 5, we note that 71.7% of respondents indicate that they will purchase their next color MFP, while only 21.4% indicate a lease as the acquisition alternative.

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
Purchase	71.7%	73.7%	86.1%	33.3%	63.6%	30.4%
Lease	21.4%	21.1%	5.6%	66.7%	36.4%	60.9%
Not Going To Obtain One	4.0%	0.0%	4.2%	0.0%	0.0%	4.3%
Rent	2.9%	5.3%	4.2%	0.0%	0.0%	4.3%

Source: OPA

We asked respondents to identify the *primary* function considered when acquiring a color MFP product. Traditionally, this would have been the copy function. Now, however, responsibility for MFP products is shifting to the IT community. Consequently, we note that in Table 6, the print function was considered most important by 51.4% of respondents. Those in the Xerox brand group indicated the greatest emphasis on printing (66.7%), while Konica Minolta users indicated all functions were the most important function with the greatest frequency (54.7%).

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
Print	51.4%	57.9%	44.6%	36.4%	50.0%	66.7%
All	29.7%	21.1%	31.1%	54.5%	25.0%	20.8%
Copy	5.4%	15.8%	2.7%	0.0%	16.7%	4.2%
Scan	5.4%	5.3%	8.1%	9.1%	0.0%	0.0%
Fax	4.9%	0.0%	9.5%	0.0%	0.0%	0.0%
Larger Machine	0.5%	0.0%	0.0%	0.0%	0.0%	4.2%
Paper Sizes	0.5%	0.0%	0.0%	0.0%	0.0%	4.2%
Wireless Connectivity	0.5%	0.0%	1.4%	0.0%	0.0%	0.0%
Don't Know	1.6%	0.0%	2.7%	0.0%	8.3%	0.0%

Source: OPA

In Table 7, we find that 68.2% of the color MFPs in our study are connected to a network rather than directly to a workstation. The average network in our sample has 5.0 workstations giving access to an average of 4.0 users.

Table 7 – Network Usage						
	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
Percent Connected To A Network	68.2%	47.4%	63.2%	100.0%	91.7%	91.7%
Number Having Access To MFP Unit *	4.0	4.0	3.0	5.3	10.0	4.0
Number Of PCs On Network *	5.0	6.0	3.0	6.5	10.0	5.0
<b>Color Usage Limited To Certain People:</b>						
Yes	10.1%	15.8%	7.1%	0.0%	40.0%	13.0%
<i>*Median Values Used</i>						
Source: OPA						

Focusing on existing MFP installations, we asked respondents to indicate the number of pages generated each month for each of their MFP functions. Print pages outnumber copy pages by a ratio of 5X. Table 8 shows the highest number of printed pages is found in the Ricoh Family Group (4,000), while the highest number of copy pages is found in the Konica Minolta category (1,375).

Table 8 – Usage Patterns By Functions*						
	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
Print Output	1,000	2,550	450	1,500	4,000	3,000
Copy Output	200	100	100	1,375	875	750
Scan Volume	60	50	50	100	200	100
Fax Output	20	63	20	75	75	50
<i>*Median Values Used</i>						
Source: OPA						

Virtually all MFP systems currently sold have scanning embedded as a function. However, some systems require that function to be enabled (at additional cost) before use is possible. Here, in Table 9, we note that 76.2% of the color MFPs in our study have the scanning function enabled. The highest percentage (100.0%) is found in the Konica Minolta brand group. Note that the average Scan Volume's listed between Table 9 and Table 10 vary slightly due to different base of respondents replying to each question.

Table 9 – Scanner Usage						
	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
Scan Option Enabled	76.2%	94.7%	80.8%	100.0%	83.3%	75.0%
Monthly Scan Volume*	50	50	50	300	600	100
<i>*Median Values Used</i>						
Source: OPA						

Table 10 shows the average job produced on the color MFP systems included in our study consists of 4.3 black and white pages or 2.5 color pages. Xerox users indicate the highest number of pages in a color job (5.0). The average number of sets per job (median) is the same for both black and white and color jobs (1.0).

Table 10 – Average Job Description*						
	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Average Pages Per Document:</b>						
Black & White Output	4.3	3.5	3.0	5.0	7.5	5.0
Color Output	2.5	1.0	2.0	4.3	3.0	5.0
<b>Average Sets Per Document:</b>						
Black & White Output	1.0	2.0	1.3	1.3	1.0	1.5
Color Output	1.0	1.0	1.0	1.0	6.0	1.5
Mixed Output	0.0	0.0	0.0	0.0	0.0	0.0
*Median Values Used						
Source: OPA						

In Table 11, ink jet systems continue to outnumber Laser/LED systems in the office, although we suspect that the average page count on Laser/LED is higher. This difference may narrow given the declining cost of ink jet output.

Table 11 – Device Technology						
	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
Ink Jet	54.2%	47.4%	74.3%	0.0%	0.0%	29.2%
Laser/LED	45.8%	52.6%	25.7%	100.0%	100.0%	70.8%
Source: OPA						

Three-quarters of our user sample use OEM supplies exclusively in their color MFP systems. Future plans do not indicate a change in buying patterns. The Canon user group indicates the highest percentage of compatible supply usage (21.1%), while the Konica Minolta user group indicates 100.0% use of genuine supplies as shown in Table 12.

Table 12 – Genuine Supplies/Future Genuine Supplies						
	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Currently Use Genuine Supplies:</b>						
Genuine	75.9%	73.7%	78.1%	100.0%	70.0%	91.7%
Compatible	16.1%	21.1%	15.1%	0.0%	10.0%	4.2%
Both	8.0%	5.3%	6.8%	0.0%	20.0%	4.2%
<b>Plan To Use Genuine Supplies in The Future:</b>						
Yes	75.3%	84.2%	76.1%	91.7%	70.0%	91.3%
No	15.3%	10.5%	15.5%	8.3%	10.0%	4.3%
Don't Know	9.4%	5.3%	8.5%	0.0%	20.0%	4.3%
Source: OPA						

We presented our respondents with a list of full-color features and asked them to rate each on a scale of 1 to 10, with “10” being the most important to the respondent. Responses to these features are reported in the final tables.

Table 13 summarizes the respondents' priorities for choosing a color device, based on a scale of 1-10. The most important features mentioned by connected color users are Overall Product Reliability (9.6), Affordability, General Ease of Use, Image Quality, Print Driver Stability and Controller Stability (all at 9.3). However, reliability is a nebulous criterion; everyone wants it, but its efficiency cannot be accurately determined until the product is acquired, in-

stalled and working under “real world” conditions, the nature of which is as varied as the number of locations in which it is installed. The best determinant for reliability in any given environment is past performance of a product by the same manufacturer.

While Cost Per Page for Color ranked much lower (8.6), bear in mind that the majority of respondents are users/administrators and not purchasing decision-makers for connected color products. Even purchasing decision-makers rarely rank “cost” first. Our experience indicates that cost is important only if other “base” criteria (those ranked higher) are met.

Tables 14 - 23 summarize user ratings regarding the performance and effectiveness of their color MFP products in the following categories:

- Total Cost of Operation (TCO)/Maintenance
- Operability/Functionality
- Image Quality
- Workstation/Network Compatibility

Konica Minolta received the greatest number of first place ratings (10) as well as the Overall Average (9.17).

Table 13 – Importance Ratings	
	<u>Universe</u>
<b>TCO/Maintenance:</b>	
Affordability .....	9.3
Ease Of Operator Maintenance .....	9.2
Ease Of Calibration .....	8.8
Cost Per Page B&W .....	8.7
Cost Per Page Color .....	8.6
FSMA .....	6.1
<b>Operability/Functionality:</b>	
Overall Product Reliability .....	9.6
General Ease Of Use .....	9.3
Productivity .....	9.2
Scanning Capability .....	8.8
Speed – First Color Page .....	8.1
Speed – Multiple Pages .....	8.1
<b>Image Quality:</b>	
Image Quality .....	9.3
Color Fidelity .....	8.5
Color Consistency .....	8.5
<b>Workstation/Network Compatibility:</b>	
Print Driver Stability .....	9.3
Controller Reliability .....	9.3
Network Compatibility .....	8.1
<b>Source: OPA</b>	

Table 14 – Performance Ratings For TCO/Maintenance						
	<u>Universe</u>	<u>Canon</u>	<u>Hewlett-Packard</u>	<u>Konica Minolta</u>	<u>Ricoh Family Group</u>	<u>Xerox</u>
<b>TCO/Maintenance:</b>						
Affordability	8.74	8.83	8.76	8.71	8.55	<b>9.05</b>
Ease Of Operator Maintenance	8.91	9.12	8.84	8.83	8.55	<b>9.17</b>
Ease Of Calibration	8.67	8.28	8.70	8.25	8.90	<b>9.05</b>
Cost Per Page – B&W	7.82	7.23	7.38	<b>9.27</b>	8.75	8.67
Cost Per Page – Color	8.16	7.36	8.28	<b>9.27</b>	8.89	8.47
FSMA	8.54	9.22	7.53	9.27	8.89	<b>9.38</b>
<b>Average</b>	<b>8.47</b>	<b>8.34</b>	<b>8.25</b>	<b>8.93</b>	<b>8.76</b>	<b>8.97</b>
<b>Source: OPA</b>						



Table 15 – Performance Ratings For Operability/Functionality

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Operability/Functionality:</b>						
Overall Product Reliability	8.78	8.44	8.76	9.29	8.36	<b>9.48</b>
General Ease Of Use	8.90	9.22	8.69	<b>9.25</b>	8.64	9.13
Productivity	8.64	8.00	8.53	<b>9.58</b>	8.45	9.27
Scanning Capability	8.57	8.47	8.17	<b>9.42</b>	8.60	8.80
Speed – First Color Page	7.68	6.33	7.45	8.75	8.30	<b>8.86</b>
Speed – Multiple Pages	7.84	6.83	7.68	<b>9.25</b>	8.10	9.05
<b>Average</b>	<b>8.40</b>	<b>7.88</b>	<b>8.21</b>	<b>9.26</b>	<b>8.41</b>	<b>9.10</b>

Source: OPA

Table 16 – Performance Ratings For Image Quality

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Image Quality:</b>						
Image Quality	8.74	8.42	8.61	9.17	8.73	<b>9.22</b>
Color Fidelity	8.53	8.22	8.27	<b>9.25</b>	8.30	9.14
Color Consistency	8.63	8.17	8.43	<b>9.25</b>	9.00	9.18
<b>Average</b>	<b>8.63</b>	<b>8.27</b>	<b>8.44</b>	<b>9.22</b>	<b>8.68</b>	<b>9.18</b>

Source: OPA

Table 17 – Performance Ratings For Workstation/Network Compatibility

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Workstation/Network Compatibility:</b>						
Print Driver Stability	8.88	9.00	8.61	<b>9.50</b>	8.80	9.05
Controller Reliability	8.85	8.94	8.68	<b>9.38</b>	8.80	8.91
Network Compatibility	8.93	<b>9.50</b>	8.77	9.33	9.00	9.29
<b>Average</b>	<b>8.89</b>	<b>9.15</b>	<b>8.69</b>	<b>9.40</b>	<b>8.87</b>	<b>9.08</b>

Source: OPA

Table 18 – Performance Ratings – Overall Average

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Overall Average</b>	<b>8.55</b>	<b>8.31</b>	<b>8.34</b>	<b>9.17</b>	<b>8.65</b>	<b>9.07</b>

Source: OPA

The previous set of tables presented the Performance ratings given by our respondents. These ratings were offered without regard to the importance of any given feature set. For example, a user could have rated scanning performance very high but might have stated that, despite this, it was not important to them. The features where performance matters most are those that are most important to users.

In an attempt to better understand that dynamic, we combined the Performance Ratings with the Importance ratings to produce weighted averages that we call the Effectiveness Ratings. These are presented in Tables 19 - 23.

Here we find that Konica Minolta received the highest Effectiveness Ratings for TCO/Maintenance, Operability/Functionality, Image Quality and Workstation/Network Compatibility. The company received the most first place ratings as well as the highest Overall Average rating. We congratulate Konica Minolta for their first place showings in both the Color MFP Performance and Effectiveness ratings.

Table 19 – Effectiveness Ratings For TCO/Maintenance

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>TCO/Maintenance:</b>						
Affordability	9.02	9.09	8.86	9.17	9.19	<b>9.31</b>
Ease Of Operator Maintenance	9.04	8.92	8.96	9.25	9.05	<b>9.35</b>
Ease Of Calibration	8.74	8.67	8.63	8.92	8.90	<b>9.16</b>
Cost Per Page – B&W	8.24	7.84	7.92	<b>9.36</b>	8.78	8.70
Cost Per Page – Color	8.40	8.02	8.22	<b>9.36</b>	8.90	8.65
FSMA	7.31	7.82	6.05	9.18	<b>9.20</b>	8.78
<b>Average</b>	<b>8.46</b>	<b>8.39</b>	<b>8.10</b>	<b>9.21</b>	<b>9.00</b>	<b>8.99</b>

Source: OPA

Table 20 – Effectiveness Ratings For Operability/Functionality

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Operability/Functionality:</b>						
Overall Product Reliability	9.18	9.01	9.10	<b>9.61</b>	9.14	<b>9.61</b>
General Ease Of Use	9.11	9.20	9.03	<b>9.46</b>	9.19	9.33
Productivity	8.93	8.56	8.77	<b>9.63</b>	9.03	9.50
Scanning Capability	8.69	7.95	8.15	<b>9.59</b>	8.94	8.51
Speed – First Color Page	7.89	7.21	7.49	<b>8.96</b>	8.55	8.89
Speed – Multiple Pages	7.99	7.38	7.61	<b>9.21</b>	8.45	9.12
<b>Average</b>	<b>8.63</b>	<b>8.22</b>	<b>8.36</b>	<b>9.41</b>	<b>8.88</b>	<b>9.16</b>

Source: OPA

Table 21 – Effectiveness Ratings For Image Quality

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Image Quality:</b>						
Image Quality	9.03	8.63	8.91	<b>9.59</b>	8.78	9.53
Color Fidelity	8.53	8.14	8.11	9.25	8.78	<b>9.45</b>
Color Consistency	8.58	8.09	8.20	9.21	9.08	<b>9.48</b>
<b>Average</b>	<b>8.71</b>	<b>8.28</b>	<b>8.40</b>	<b>9.35</b>	<b>8.88</b>	<b>9.48</b>

Source: OPA

Table 22 – Effectiveness Ratings For Workstation/Network Compatibility

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Workstation/Network Compatibility:</b>						
Print Driver Stability	9.09	9.32	8.90	<b>9.63</b>	9.00	9.25
Controller Reliability	9.06	9.05	8.94	<b>9.57</b>	9.15	9.23
Network Compatibility	8.50	8.20	8.31	<b>9.54</b>	9.28	9.36
<b>Average</b>	<b>8.88</b>	<b>8.85</b>	<b>8.72</b>	<b>9.58</b>	<b>9.14</b>	<b>9.28</b>

Source: OPA

Table 23 – Effectiveness Ratings – Overall Average

	Universe	Canon	Hewlett-Packard	Konica Minolta	Ricoh Family Group	Xerox
<b>Overall Average</b>	<b>8.63</b>	<b>8.39</b>	<b>8.34</b>	<b>9.36</b>	<b>8.96</b>	<b>9.18</b>

Source: OPA



KONICA MINOLTA