

Sustainability Leaders, 2024

A review of sustainability initiatives by major print vendors



Executive summary

Print manufacturers and their partners face a complex landscape of rising energy costs, stricter regulations, and growing demands for sustainability from stakeholders and customers. Notable regulations that can impact a global basis include the EU Ecodesign for Sustainable Products Regulation (ESPR), the Right to Repair, and the EU Corporate Sustainability Reporting Directive (CSRD) being phased in for the FY24 reporting period. To address the climate crisis and reduce greenhouse gas emissions (GHGs), the industry must prioritise carbon reduction and commit to ambitious sustainability targets. Print manufacturers are committing to reducing not only their own GHGs but also the emissions resulting from their own supply chains and customers.

While many OEMs aim to achieve net-zero emissions by 2050, several vendors are setting more ambitious targets. HP and Xerox have committed to net-zero emissions by 2040. Lexmark has a 2035 net neutrality target, and Epson targets carbon-negative status by 2050. These targets often reflect the company's overall global operations, not solely the manufacturing of printing products. This acceleration towards earlier target dates is driven by factors such as increased experience in collecting and utilising emissions data. Quocirca expects that these early target dates and terminology differentiators will increasingly be used as competitive differentiators.

There is a clear trend towards increased adoption of renewable energy sources within the industry. Epson is a notable example, having achieved almost 100% renewable electricity usage across all its global sites by 2023. This significant step demonstrates the company's commitment to sustainability and its ability to implement large-scale renewable energy solutions. HP follows in second place, achieving 59% renewable electricity usage in its global operations, a significant step towards its goal of 100% renewable electricity by 2025.

Accelerating the transition to a sustainable print industry necessitates a shift away from the linear 'take-make-dispose' model and towards circular economy principles, leveraging and extending the leasing, reusing, repairing, refurbishing, and recycling services seen within mature managed print services (MPS) models.

Over the past year, print vendors have continued to enhance the environmental credentials of their product portfolio. This includes increasing the use of post-consumer recycled (PCR) materials in devices, improving energy efficiency, and implementing comprehensive recycling programmes for consumables and hardware. A sustainable-by-design approach and lifecycle assessments (LCAs) have become standard practices across the industry. New refurbishment programmes were launched in 2024, such as HP Renew Solutions, offering certified refurbished PCs and printers, further extending the life of devices and reducing electronic waste. Remanufactured product lines from Canon, Lexmark, Ricoh, and Xerox are also available.

The print industry, while making strides in product sustainability, must prioritise providing accurate and reliable environmental impact data to customers. Currently, fragmented approaches and a lack of data standardisation hinder customers' ability to assess the true environmental footprint of their print infrastructure, encompassing hardware (manufacture, delivery, and usage), paper, and consumables. Despite 83% of IT decision-makers in Quocirca's 2024 Sustainability study recognising the importance of environmental data, they are struggling to get what they need from vendors. Print vendors must bridge this gap to empower informed decision-making and drive sustainable practices.

Sustainability assessments have become essential tools for evaluating and improving the environmental impact of printing practices, but the quality and scope can vary significantly between different MPS providers. While some providers focus solely on traditional print environments, others take a broader approach, evaluating opportunities for digitisation and business process optimisation to further reduce environmental impact. A leading offering, launched in September 2024, is the Xerox Verified Carbon Neutrality Service, an MPS offering developed to the ISO 14068 carbon neutrality standard and independently verified. Another notable launch in 2024 was Ricoh's new Sustainability Services Dashboard, developed in partnership with Watershed, which reports on emissions data associated with Ricoh Digital Services.

This report provides an overview of the print vendor sustainability landscape in 2024, exploring how vendors are accelerating sustainability goals across business operations, how sustainability is embedded across products and services through circular programmes, and how the channel is being supported. The report includes detailed profiles for participating vendors: Brother, Canon, Epson, HP, Konica Minolta, Ricoh, Sharp, Toshiba, and Xerox. Print vendors' sustainability targets are summarised in the Appendix.

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Quocirca Sustainability Vendor Landscape, 2024

Quocirca's Sustainability Vendor Landscape is a visual representation of the environmental commitments of the major print manufacturers and the breadth and depth of their sustainability-led products and services. Please note that for this 2024 report, Quocirca has made some changes to the criteria used in the Strategy and Completeness of Offering sections to represent better how sustainability is addressed by the vendor and delivered to the market.

This evaluation is intended as a starting point only. Please note that Quocirca's scoring is based on an unweighted model. Prospective buyers should use this as guidance, along with the more detailed vendor profiles, to assess suppliers based on their specific requirements.

Strategy

Each vendor has been scored on a range of criteria encompassing its overall sustainability strategy and commitments, as well as its vision for its print business. Published ESG data is used to evaluate sustainability commitments. Please note that the published ESG data used is for the whole company group, as vendors do not provide print business ESG data separately.

- **Vision and strategy.** The comprehensiveness of the vendor's sustainability strategy and its evolutionary vision to lower environmental impact across its business.
- **Maturity of offerings.** How developed the vendor's sustainability offerings and services for its clients are.
- **Sustainability commitments.** Commitments to net zero and progress in reducing Scope 1, 2, and 3 emissions. This includes energy usage, renewable energy usage, total waste output and waste recycled, total water used, and target dates and percentage of reduction in CO₂ or CO₂-equivalent outputs.
- **Circular strategies.** These relate to strategies in areas such as remanufacturing, recycling, and product life extension.
- **Market credibility.** The effectiveness of the vendor's initiatives to promote its brand, increase awareness of its sustainability offerings, and influence market development. This includes clarity, differentiation, and internal/external consistency in the vendor's market messages.
- **Sustainability technology innovation.** This considers technology across the hardware, software, and services portfolio. It also considers the use of emerging technology, such as AI or blockchain, to enhance sustainability efforts by improving tracking and verifying emissions.
- **Alliances and partnerships.** This considers environmental partnerships on a global and regional basis and how vendors are collaborating in cross-industry initiatives. It also evaluates partnerships with third-party ISVs.
- **Channel strategy.** This evaluates channel enablement strategies through partner programmes that offer channel partners training and certification to enhance their sustainability and create stronger propositions for their customers.

Completeness of offering

This evaluates vendors' approaches to customer enablement and how they are helping customers reduce their carbon footprint. It considers the following:

- **Breadth and depth of product portfolio.** This looks at environmental features across the portfolio, including energy efficiency, eco modes, and use of recycled materials. It also considers print management features that minimise wasteful printing and optimise device utilisation rates.
- **Recycling programmes.** Under the WEEE Directive, which was originally mandated in the EU, most countries require vendors to offer equipment take-back at end of life. This criterion looks at vendors' basic and advanced recycling programmes for print devices and consumables.
- **Remanufacturing/refurbishment.** Some vendors offer specific programmes for refurbishing and reusing print devices, while others focus on complete remanufacturing. These often change more parts than refurbishment and offer greater guarantees and support. Some vendors offer both services.
- **Sustainability services.** This evaluates the breadth and depth of services encompassing environmental assessments and carbon footprint calculators, MPS offerings, environmental analytics, cloud-based platforms, and digital workflow automation capabilities.

Figure 1 represents Quocirca’s view of the Sustainability Vendor Landscape:

- **Leaders.** Leaders demonstrate a strong vision and commitment to net zero and have strength and depth across the board for both completeness of sustainability offerings and strategy vision and execution. This includes innovation and differentiation in AI adoption and solutions such as sustainability assessments and services.
- **Major players.** Vendors that have established sustainability products and services but may lack vision and a differentiated sustainability roadmap. These vendors may be focused primarily on the channel ecosystem.
- **Contenders.** These vendors have a weaker strategy and sustainability-led product portfolio and may lag in environmental features with a less differentiated sustainability roadmap.

The Quocirca Vendor Landscape is a graphical representation of Quocirca’s opinion of the market based on Quocirca’s scorecard methodology. This information is provided as a visual representation only and should be combined with other sources to determine the suitability of any vendor. Quocirca does not endorse any vendor, product, or service. Information is based on the best available resources, and opinions reflect judgement at the time. All opinions are subject to change.



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Figure 1. Quocirca Sustainability Vendor Landscape, 2024

Vendor profile: HP

Quocirca opinion

HP has retained a leadership position in Quocirca's assessment of the Sustainability Vendor Landscape in 2024. HP's dedication to sustainability is clearly demonstrated through its extensive product range and forward-thinking initiatives. The company's leadership in this field can be attributed to several key factors. These include a comprehensive and diverse portfolio encompassing both PC and print products, as well as innovative programmes such as HP Renew, which promote product circularity. Additionally, HP Amplify Impact, a channel programme designed to foster sustainable practices, has been gaining significant traction.

The company acknowledges the positive link between corporate responsibility and commercial success. In its latest Sustainability Impact 2023 report, it notes that HP's sustainable revenue – revenue from products and services that help reduce environmental impact – represented more than 60% of total revenue in 2023. HP's long-term commitment to sustainability is evident in the depth and breadth of initiatives across its product and services portfolio. In 2023, HP earned a Platinum rating from EcoVadis.

Targeting net zero by 2040

HP achieved a 27% reduction in greenhouse gas emissions compared to its 2019 levels, bringing it closer to its ambitious goal of achieving net-zero emissions across its value chain by 2040. Its sustainability strategy is based on three pillars: climate action, human rights, and digital equity. In 2023, it reported a 27% reduction in value chain GHG emissions from the 2019 baseline, against an overall goal of reducing value chain GHG emissions by 50% by 2030 and reaching net zero by 2040. It also reported a 62% reduction in Scope 1 and Scope 2 emissions compared to 2015, against a target of 65% by 2025. HP aims to use 100% renewable energy by 2025, tracking at 59% in 2023, a rise from 55% in 2022.

Progress with circularity goals

Circularity is embedded across HP's product lifecycle, with products designed for energy efficiency, durability, and reparability. It continues to increase the amounts of recycled and renewable materials, such as ocean-bound plastic, in its products. In the past year, it has introduced new services to support the repair, refurbishment, and reuse of products to reduce environmental impact through extended device life.

HP aims to reach 75% circularity for products and packaging by 2030, reporting that in 2023, its progress toward meeting this goal reached 40%. It aims to use 30% PCR content plastic across its personal systems and print product portfolio by 2025, up from 18% today. In 2023 HP reports it used a total of 34,400 tonnes of PCR content plastic. In 2023, HP reached 87% of its zero-waste target for its operations and 62% of its target to eliminate 75% of single-use plastic packaging.

The company has made a range of improvements in toner and cartridge technology. Its TerraJet cartridges use up to 27% less energy when printing and 78% less plastic than previous cartridges. They are made with 35% recycled plastic and come in smaller, more ergonomic cartridges. The company reports that 88% of Original HP Ink cartridges contain 5 to 75% PCR content.

Environmental standards

HP conforms to a range of environmental standards, including the EPEAT eco label and ENERGY STAR, under which it had over 800 certified personal systems and printing products as of March 2024. It participates in the Clean Energy Demand Initiative (CEDI) and conforms to IEEE standard 1680.2, as well as meeting Blue Angel environmental criteria. It is also Forest Stewardship Council (FSC) certified. The range of ink certifications, such as for its Flex Tech inks, include UL ECOLOGO Certification and GREENGUARD.

New services to help customers lower their environmental footprint

Alongside circular principles for its hardware, HP offers specific services to help customers reduce their carbon footprint. This includes its Carbon Neutral Service, which enables its MPS customers to improve energy efficiency and reduce wasteful printing and supplies usage. Customers can offset any remaining emissions through third-party-verified projects around the globe in partnership with Climate Impact Partners, which HP facilitates. In 2024, HP introduced HP Renew Solutions, which offers a portfolio of certified refurbished hardware. This has

been expanded to include LaserJet Multi-Function Printers, available for Managed Print Solutions customers in the US, and already includes HP EliteBook 800 G6 and G7 series notebooks in the US and France. HP has also expanded HOPE Recycling Futures, which provides recycled PCs to schools serving vulnerable and marginalised youth. More than 16,000 children in 22 countries have benefited from the programme through 72 donation projects to date. The latest move extends the programme to Mexico.

Market-leading channel sustainability programme

HP was the first IT company to offer a comprehensive and integrated channel sustainability programme across print and PCs. It has a mature sustainability-led channel programme with HP Amplify Impact, which helps its broad and diverse channel ecosystem enhance its sustainability efforts. The success of HP Amplify with its channel partners is essential for HP to deliver on its sustainability goals. By leveraging the strengths and reach of its partners, HP can drive meaningful and widespread impact. Amplify Impact now serves over 40% of eligible partners in 48 countries and is on track to enrol at least 50% of Amplify partners by 2025. The programme is seeing ongoing success in helping channel partners win sustainability-related deals and acquire new customers. New developments for partners in 2024 include the Amplify Impact Portal, which hosts virtual training, co-marketing toolkits, and comprehensive sales resources.

Summary

HP's strong brand reputation as a responsible and environmentally conscious company has helped solidify its position as a leader in sustainability. It can maintain this leadership position by ensuring sustainability initiatives are implemented consistently across all products, regions, and business units. Extending refurbishment programmes, whether by building facilities or partnering, will help give a broader range of products a second life. As HP accelerates its AI and technology upgrade initiatives, integrating environmental sustainability into every aspect of its strategy will be crucial. To ensure its focus on technological advancements does not compromise its sustainability goals, it will need to continue to prioritise closed-loop systems where materials are continuously reused and recycled within its value chain.

Strengths and opportunities

Strengths

- **HP has a strong commitment to net zero and broader environmental impact reduction.** HP is showing good progress across the majority of measures – exceeding targets in some areas – while being transparent about areas where there is work to do.
- **HP leads with its channel strategy.** HP Amplify Impact is well-established, and adoption is growing strongly as channel partners seek to do more deals on the basis of sustainability performance. HP continues to invest in the programme to make it accessible to more partners and extend its geographical reach.
- **HP offers several services that can help customers work towards their own environmental targets.** Carbon Neutral MPS and Device Life Extension are two examples which, together with HP's broad portfolio of print and PC devices developed under its long-standing Design for Circularity programme, give customers practical, measurable ways to reduce impact.
- **HP Renew Solutions enhances HP's refurbishment strategy.** Launched in 2023, HP Renew Solutions has strong potential to meet market demand for refurbished devices, driven by regulation, low cost of ownership, and customers' increasing sustainability goals. Refurbishing devices to like-new status also helps mitigate risks from component shortages and ensures that refurbished devices deliver the required quality, security, and performance.

Opportunities

- **Balance AI drive with sustainability strategy.** As HP and all technology players in this space introduce AI-enabled devices and their availability affects the conventional technology refresh cycle, the company must articulate how promoting the transition to new devices aligns with its sustainability goals and strategy. Customers need to be clear on any trade-off between device performance and the sustainability of renewing devices if they are doing this ahead of the planned refresh date.

- **Unify sustainability messaging across PC and print divisions.** While the broad portfolio is a strength, HP could capitalise more strongly on it by elevating messages around print devices to match those focused on PCs. Indeed, it could show more clearly the innovations that have come from print than the other way around.

Sustainability strategy

HP has a strong sense of responsibility for climate action and considers sustainable operations vital to the resilience and longevity of its business. It backs this with a climate change-focused strategy covering carbon emissions, circularity, and forests. Its objective is to act urgently and decisively to achieve net zero carbon emissions across its value chain and within HP operations, give back more to forests than it takes, and drive innovation around its products and services to support the circular economy.

There are five climate action strategic drivers: print and compute as a service, sustainable materials, supply chain decarbonisation, energy efficiency, and forest investments in order to reduce GHG emissions and resource consumption, drive innovation, and transform its design and business models.

The science-based strategy is aligned with the United Nations SDGs, HP's core business, and factors in ongoing engagement with stakeholders. A new Environmental, Social and Governance (ESG) materiality assessment was carried out in early 2024 to identify and assess sustainability impacts, risks, and opportunities and inform what HP describes as its aggressive climate goals. These include halving Scope 1, 2, and 3 emissions by 2030 compared to 2019 and achieving net zero across the entire value chain by 2040.

Interim goals are fast approaching. The company's 2025 carbon emissions goals include 100% use of renewable energy and reducing Scope 1 and 2 GHG emissions by 65% compared to 2015. Achievements stood at 59% and 62%, respectively, in 2023. There is a target date of 2030 to halve HP GHG emissions across the value chain compared to a 2019 baseline; it reached 27% in 2023. The net zero emissions goal is 2040. HP exceeded its 2025 35% potable water reduction goal in 2023.

Progress is evident on the financial front, where sustainable revenue represented more than 60% of total revenue in 2023 as per the Corporate Knights Sustainable Economy Taxonomy.

HP's programmes and progress have secured seven consecutive years on the CDP Climate A list and nine consecutive years on the Dow Jones Sustainability World Index.

Product sustainability and circularity

HP's long-standing commitment to designing for circularity and to improve environmental performance underpin the product strategy: it says up to 80% of a product's impact is determined at the design phase. The Design for Environment programme – now called Design for Circularity – was developed as early as 1992 to formally consider sustainability factors throughout product design and development.

Product development is guided by a set of design priorities: lifetime carbon assessments (LCA) and product carbon foot printing (PCF) to improve understanding of environmental impacts, increasing the use of recycled and renewable materials, responsible chemistry, enhancing product repairability, reusability, longevity and recyclability, improving product energy efficiency, and packaging innovation.

During 2023, HP made progress on its 2025 circularity goals. It achieved 87% of its zero-waste target for HP operations and reached 62% of the target to eliminate 75% of single-use plastic packaging. The aim to use 30% PCR content plastic across the personal systems and print product portfolio is progressing, having reached 18%. HP has recycled 992k tonnes of hardware and supplies since 2016 on route to the 2025 target of 1.2 million tonnes. The 2030 goal is 75% circularity for products and packaging, with 40% achieved in 2023.

Print product portfolio

Product design and development operations for personal computing products, LaserJet Enterprise Solutions, and Inkjet Printing Solutions are ISO 14001 certified, and internal compliance audits and benchmarks against industry best practices are conducted on an ongoing basis. As a member of the Circular Electronics Partnership (CEP), HP contributed to the revision of the CEP roadmap in 2023, which addresses barriers and identifies enablers related to the transition to a circular economy.

- **Home and Office printing.** The HP Color LaserJet Enterprise MFP 5800 Series has an improved energy-efficient design that meets EPEAT Gold, ENERGY STAR, and Blue Angel criteria. It also uses HP TerraJet Toner supplies that consume less energy and generate less heat than its predecessor. It incorporates 8% PCR content plastic in the chassis and 35% in toner cartridges.
- **Large-format printing.** HP's new DesignJet T850 and T950 series printers feature the Energy Scheduler, which helps reduce energy use by at least 60% through automatic power cycling, and the printers and plotters contain at least 40% and 35% PCR plastic content, respectively. The combination of hardware and HP Professional Print Service supports circularity by prolonging the life of large-format printers. HP has also redesigned the DesignJet T200 and T600 Printer Series 2025 Edition with sustainability in mind. The printers are engineered to reduce impact and meet evolving business needs. With over 50% plastic waste reduction in packaging owing to new moulded fibre technology and the removal of most plastic bags, they are also made with at least 40% recycled plastic and are the first HP large-format printers to include certified recycled metal. HP also provides an auto ON/OFF schedule feature enabling customers to save up to 65% on energy costs.
- **Industrial print.** HP Indigo's printing technology, LEPx, delivers the digital print quality and versatility of HP Indigo at analogue print speeds. With LEPx, high throughput and productivity can be achieved virtually independently of the number of colour separations, reducing the carbon footprint of multiple colour jobs. The label press, HP Indigo V12 Digital Press, is the first HP Indigo product to feature LEPx technology. It can potentially replace two to four flexo machines for mid-length to long print jobs and has the capability to save substantial amounts of media by eliminating flexo printing waste, which is a main contributor to the carbon footprint of print jobs.

Toner and ink cartridge circular design

Sustainable product examples include HP EvoCycle toner cartridges, which include a minimum of 75% reused and recycled components (excluding toner and parts that directly impact print quality), or 45% by absolute weight, leading to a 37% lower carbon footprint than standard Original HP Toner Cartridges. HP EvoMore Original Ink Cartridges are designed to reduce carbon footprint and waste by printing twice the number of pages per cartridge, decreasing replacements and GHG emissions. They were made available in the US in November 2023 having previously being sold in France, Germany, and the UK. Cartridges can be returned within each region through the HP Planet Partners programme. Additionally, HP latex inks are made in a factory that uses reclaimed water.

Supply chain

HP launched its Supplier Code of Conduct in 2002 to implement systems to achieve long-lasting conformance to social and environmental standards. Supplier adherence is required and there is an audit programme.

The code includes a sustainability scorecard, which provides suppliers with a score that encompasses audit performance (60% of total score), environmental reporting (13%), conflict minerals disclosure (6%), and other social and environmental topics (21%). The scorecard incentivises suppliers by acting as a modifier to the general supplier management score. Suppliers with strong sustainability performance improve their opportunities for new or expanded business, and those with poor sustainability performance risk a reduction in the business they are awarded.

During 2023, average scores for final assembly suppliers increased by one percentage point compared to 2022, while average scores for commodity suppliers decreased by six percentage points. Supplier Responsibility Scorecards applied to suppliers representing 46% of HP's production spend.

Steps to minimise the social and environmental impact of the supply chain include implementation of a Supply Chain Social and Environmental Policy. HP adopts the RBA Code of Conduct covering supplier labour, human rights, health, safety, environmental, and ethical expectations. Supplier contract and purchasing agreements have been updated to reflect HP's new expectations and expanded performance results of supply chain conformance in HP's annual Sustainable Impact Report. Alongside facility audits and social and environmental responsibility conformance monitoring processes, there are requirements for supplier performance reporting and corrective actions for non-conformance.

HP engages with a wide range of stakeholders to improve its understanding of sustainability within its supply chain and collaborates to drive improvements to human and environmental challenges. Its work is being recognised. Examples include a Platinum Corporate Social Responsibility Rating by EcoVadis in 2024 and second place in the 2022–23 benchmarking of ICT companies by KnowTheChain. It was ranked 67th in the 2024 Global 100 Most Sustainable Corporations in the World compiled by Corporate Knight. It received the SmartWay High Performer award in the shippers category from the US Environmental Protection Agency (EPA).

Partnerships

HP works with a range of organisations and initiatives to contribute to improvements in the sustainable impact of operations and supply chains. Key partnerships include:

- **Responsible Business Alliance (RBA).** This consortium of companies drives improvements in global supply chains by collaborating, sharing tools, and promoting transparency and accountability. HP was a founding member.
- **Responsible Labor Initiative (RLI).** HP's director of human rights and supply chain responsibility is the chair of the steering committee for RLI, an initiative of the RBA. Three training sessions in Malaysia enabled labour agents used within members' supply chains to learn more about customer expectations related to ethical recruitment.
- **CDP Supply Chain programme.** CDP promotes transparency and addresses climate change and water risks in the supply chain, with the goal of raising standards in the industry.
- **Leadership Group for Responsible Recruitment (LGRR).** The group works to eliminate worker fees and promote the Employer Pays Principle. HP was a founding member.
- **Responsible Minerals Initiative (RMI), Responsible Cobalt Initiative, and European Partnership for Responsible Minerals.** These initiatives are geared towards responsible sourcing of minerals within and beyond the IT industry.
- **Clean Electronics Production Network (CEPN).** HP is a founding member of CEPN's Green America programme, which has a goal of zero exposure of workers to toxic chemicals in the electronics manufacturing process.
- **EPA SmartWay.** The SmartWay programme helps advance supply chain sustainability.
- **Clean Energy Buyers Alliance.** This is a membership association for energy customers procuring clean energy across the US.
- **Green Freight Asia.** Drives sustainable transport, logistics, and operations in Asia.
- **Social Accountability International.** This body advances human rights at work.
- **National Minority Development Council.** Advocates for upward mobility for the emerging majority of Americans and an equal shot for minority business enterprises (MBEs) at participating in America's free-market capitalism and entrepreneurship.

HP also partners with a range of organisations and contributes to projects to support forest-positive action, including the World Wildlife Fund (WWF), Conservation International (work commenced on the Panará Indigenous Land Protection project in 2023), and Arbor Day Foundation (over 1.5 million trees planted during 2023). It worked with HP customer Hemmersbach to launch the One Million Trees Reforestation project in Indonesia in 2020. HP founded the HP Sustainable Forests Collaborative (SFC) in 2020, a consortium of nine members from paper companies and NGO partner advisers working to inspire forest-positive action across the print industry.

Sustainability services for customers

- **Carbon Neutral Managed Print Services** (part of Carbon Neutral Computing Services). This set of services helps customers reduce their carbon footprint and includes carbon footprint assessments and carbon offsetting across the lifecycle of devices. In late 2020, HP Direct MPS (dMPS) was CarbonNeutral certified in accordance with The CarbonNeutral Protocol. In 2021, HP Component MPS (cMPS) was CarbonNeutral certified, giving partners a way to make their contractual obligations carbon neutral using the same standards as HP Direct MPS.
- **HP Managed Device Services (MDS)**. The device lifecycle management service combines devices and services into a scalable as-a-service model. By maintaining functionality, device lifetimes can be extended, mitigating emissions associated with manufacturing new devices.
- **HP Device Life Extension Service**. Organisations can maximise the useful life of their PCs with HP Device Life Extension. The HP Care Pack is provided to extend printer life and includes extending the factory warranty with two- or three-year extension plans, remote problem diagnosis support, technical support, and a next-business-day exchange service for some plans.
- **HP Renew**. This programme promotes circularity through device refurbishment. HP Certified refurbished printers undergo mechanical and electrical testing, faulty parts are replaced with HP parts, software is wiped, and firmware updates are applied to ensure they deliver the same quality and performance as-new printers. They are cleaned and reset to factory settings. Certified refurbished printers come with a one-year warranty. They are available online directly from HP and for partners.
- **HP Managed Print Services (MPS)**. The MPS offering helps organisations manage and optimise printer fleets, digital workflows, and paper consumption by combining hardware, supplies, software, and consulting and management services, which has a positive impact of GHG emissions across the lifecycle of printing activity. The MPS offering supports resource efficiency and drives responsible user behaviour through settings that reduce energy, supplies, and paper use. Customers can offset any remaining emissions through third-party-verified projects in partnership with Climate Impact Partners, facilitated by HP.
- **HP Support Services**. Support services keep devices running at peak performance through maintenance strategies that help reduce carbon footprint by extending their useful life.
- **HP Instant Ink**. The ink service helps home users and microbusinesses remain productive by ensuring they never run out of ink or toner. The service anticipates when a cartridge is running low and sends replenishments as well as-new recycling envelopes (for ink cartridges) or recycling labels/information (for toner cartridges) automatically. An Instant Ink Paper Add-on service was introduced in 2022 based on pages printed. Customers can save up to 50% on the cost of ink or toner. The service is offered in 38 countries and includes access to cartridge recycling in most of those locations.
- **HP Professional Print Service**. The print service supports circularity by prolonging the life of large-format printers. Along with real-time printer configuration, monitoring, and support, HP's PrintOS app deploys proactive notifications to identify potential device issues and initiate timely resolutions.
- **AI innovation**. HP's AI/ML efforts, including those connecting to products, drive productivity efficiency, but HP also uses AI to support sustainability, for example, forecasting the amount of ink remaining in a device to minimise waste from unused Ink. Print integration within the AI-powered Workforce Experience digital employee engagement platform tracks performance and provides insights to optimise printers, fleets, and workflows to improve user experience and productivity.

Channel programmes

Amplify Impact

Launched in 2021, the comprehensive sustainability programme for channel partners aims to accelerate change by educating and empowering HP channel partners to maximise sustainable business opportunities. In an HP survey of Amplify Impact partners, 70% report that the programme has helped improve their win rate of sustainability deals. Seventy percent have increased their request for proposal win rate, and approximately 50% won a new customer in the last 12 months due to participation in Amplify Impact. The programme expanded to 48 countries in 2023 and serves over 40% of eligible partners. HP is on track to enrol at least 50% of Amplify partners by 2025. In May 2024, HP announced plans to extend Amplify Impact to distribution partners and nearly 50 countries.

Services/resources include:

- **Sustainability self-assessment.** Access to a sustainability self-assessment tool that provides a personalised report with actionable insights, industry best practices, and resources, including peer-to-peer comparisons. The assessment helps partners identify gaps and provides guidance for achieving sustainability goals. HP reports that 80% of participating partners recommend the Amplify Impact self-assessment and personalised report, and self-assessment scores have increased by 40% year on year.
- **Amplify Impact Hub.** The hub provides customised sustainability support, tools, and training for partners. It provides access to assessments and personalised reports, customised progress tracking, a training curriculum, best-in-class initiatives, and expert consultancy.
- **HP University.** The University offers a sustainability sales training curriculum, and over 120,000 training courses have been completed by partners.
- **Amplify Impact Portal.** The portal hosts virtual training, co-marketing toolkits and comprehensive sales resources.
- **Bid support.** The HP Sustainability and Compliance Centre supports partners with sustainability bids and supplies exclusive sales support materials.
- **Partner achievement promotion.** Amplify Impact partners can progress through a recognition programme, rising through three-star, four-star, and five-star status. At each level, HP provides tools and training. When it is completed, partners receive a full social media kit with badges, certificates, and personalised tracking to help them promote their achievements. Additionally, HP provides the HP Find a Reseller platform, where over 300,000 customers a year search for sustainable HP reseller partners.
- **Role-based AI training and certification programme for channel partners.** New for 2024, and although not strictly part of Amplify Impact, HP's Future Ready AI MasterClass is powered by HP University. HP Amplify AI is part of the HP Amplify partner programme, like the HP Amplify Impact programme. It covers a range of topics to help partners educate and advise customers on the right AI products and solutions for their needs. Also new, HP Growth Plays for partners is a new programme offering unique tools, advanced capabilities, and compensation elements built around HP's growth categories. Initial Growth Plays will focus on AI Data Science, Digital Services, Video Collaboration, and Active Care Services.

Recommendations

Buyer recommendations

End-user organisations should focus on the following activities to understand and minimise the environmental impact of their print activities.

- **Assess the availability and transparency of suppliers' environmental data during procurement.** Quocirca's end-user Sustainability Trends study reveals that customers lack the environmental data they believe they require to report their carbon footprint accurately. It also shows that the lack of this data is a core inhibitor to their understanding of the environmental impact of their print activities. Buyers should look for energy efficiency data and third-party ecolabel certifications such as ENERGY STAR, EPEAT, and Blue Angel; data on the proportion of recycled materials in devices; and active promotion and easy use of energy-saving modes. Transparency in the net-zero progress of print suppliers and the channel, particularly in areas such as renewable energy usage, supply chain metrics, raw materials, and manufacturing impacts, should be factored into procurement processes because of their impact on net-zero commitments.
- **Undertake sustainability assessments.** To evaluate and optimise the print environment, sustainability assessments should be undertaken to examine current print infrastructure, usage analysis, and cost analysis for direct and indirect costs, along with an environmental impact evaluation to generate a custom sustainability report with actionable recommendations. Ensure assessments include device lifecycle assessments and carbon footprint data from suppliers because they will improve accuracy and help with regulatory compliance such as CSRD. The scope of sustainability assessments is expanding and starting to be able to assess the environmental impact of digital services and link print sustainability strategies to corporate strategies.
- **Encourage sustainable practices.** Cloud print services and MPS can encourage or enforce best practices and rules. Duplex, booklet, pull, or PIN printing can help minimise wasteful printing. Intelligent print management tools can ensure the most appropriate device is used for each print job by automatically routing large jobs to lower-cost, more energy-efficient devices and applying eco-settings to print jobs, such as lower-quality print for non-important jobs or full black-and-white printing for jobs that do not require colour. Look for devices with fast warm-up times, deep-sleep and toner-saving modes, low-temperature toners, and refillable ink bottles.
- **Embrace digital transformation.** Smart MFPs can provide document capture and management and enable automated document workflows. Activity logging for individual users and departments can be used to create audit logs and identify wasteful users or groups. Digital transformation minimises inefficient and costly paper use while enhancing productivity and security and maintaining audit trails. These digital capabilities will increasingly use AI and machine learning to optimise document processes. Ensure that devices chosen interoperate with software from ISVs that can then further enable digital workflows and enterprise application integrations.

Supplier recommendations

Print vendors should prioritise collaboration, the availability of sustainability data, clear sustainable messaging, and market education to help customers lower their carbon footprints.

- **Collaborate and partner.** Demand is growing for decisive action and greater transparency in sustainability practices from print manufacturers. Suppliers have committed to net-zero goals but will not achieve transformative change by acting alone. A collaborative approach between print manufacturers, ISVs, and channel partners can accelerate sustainability progress and drive meaningful change. By leveraging the unique strengths of this ecosystem – spanning hardware, software, and services – the industry can develop best practices and reframe the sustainability narrative to focus on the intersection of print and digital technologies.

- **Provide channel partners with environmental data.** Sustainability is a priority for channel partners that are under pressure to track Scope 3 emissions and must evaluate their vendor partners' sustainability credentials. Channel partners also play a critical role in the success of print vendors' sustainability strategies, promoting sustainability practices throughout the product lifecycle and offering end-of-life product take-back and recycling programmes to reduce e-waste. Channel partners also face calls from customers to help them achieve their sustainability goals. Partners need clear environmental data from their suppliers, but Quocirca's channel research indicates a sustainability gap between their requirements and what is available. Priority action areas for suppliers include clear and detailed metrics on product lifecycle impact, help with saving customers energy across print fleets, and sustainability-focused deal support and information. There are also calls for data on recycled-materials usage, carbon footprint assessment services, and access to carbon offsetting.
- **Draw on sustainability assessments to inform sustainability decisions and educate the market.** Provide sustainability assessment services to uncover opportunities to modernise customers' print landscapes and move towards more expansive assessments that can assess digital services outside the conventional print landscape. Ensure the assessments also deliver sustainability roadmaps for customers to act on. Sustainability assessments should be used to educate the market about environmentally responsible printing practices. For example, the carbon footprint data of different devices can provide a tangible demonstration of the impact of printing decisions and the quantifiable benefits of sustainable print approaches, sparking the adoption of best practices.
- **Harness AI throughout the print lifecycle.** Suppliers must suitably harness AI to help themselves, partners, and customers optimise for sustainability – while being aware of the need to manage the environmental costs of running AI models themselves. AI can be used across the print value chain for design, production, logistics, workflow automation, waste and consumables management, predictive maintenance, and remote management, including augmented reality (AR)-assisted remote assist, to determine the best approach for end-of-life processes. AI co-pilots that adjust printer settings in real time can also improve the end-user experience and quality of outputs while reducing waste and providing a step towards digitisation.
- **Promote remanufactured and refurbished products as sustainable end-of-life options.** Refurbishment programmes retune, repair, and redistribute used products. Remanufactured products are rebuilt from individual components that could be used or repaired or new parts. They are often overlooked, but both contribute to sustainability by prolonging product lifetimes, reducing waste and carbon emissions, and supporting the circular economy

About Quocirca

Quocirca is a global market insight and research firm specialising in the convergence of print and digital technologies in the future workplace.

Since 2006, Quocirca has played an influential role in advising clients on major shifts in the market. Our consulting and research are at the forefront of the rapidly evolving print services and solutions market, trusted by clients seeking new strategies to address disruptive technologies.

Quocirca has pioneered research in many emerging market areas. More than 10 years ago we were the first to analyse the competitive global market landscape for managed print services (MPS), followed by the first global competitive review of the print security market. More recently Quocirca reinforced its leading and unique approach in the market, publishing the first study looking at the smart, connected future of print in the digital workplace. The [Global Print 2025 study](#) provides unparalleled insight into the impact of digital disruption, from both an industry executive and end-user perspective.

For more information, visit www.quocirca.com.

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