Sustainability Priorities Resonate Throughout Corporate IT Strategy, Operations, And Purchasing

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Executive Summary

Sustainability is an increasingly important priority for firms across the globe and is becoming a key differentiator in many industries. However, sustainability cannot just be bolted onto existing processes — firms must look holistically at their entire business to limit emissions, improve energy efficiency, and reduce waste. A key component of hitting their top goals is PC devices. Ensuring that they are sustainable has many downstream effects. In fact, IT decision-makers (ITDMs) are beginning to look to their device vendors to help meet many of their requirements, from reporting metrics to recyclable components.

Creating a sustainable brand requires involving many voices across the firm in the conversation, utilizing vendors for easier compliance, and engaging employees throughout the process. We found that highly mature organizations are more likely to have an employee-led green team helping define PC device choices, look to their vendors for clear reporting metrics, and use employee feedback as a marker of success for their sustainability efforts. Moving forward, it's important that companies all along the maturity spectrum take these key lessons in hand to ensure a well-rounded sustainability program.

In November 2021, Intel commissioned Forrester Consulting to explore the current state of sustainability initiatives at organizations across the globe. Forrester conducted an online survey of 607 respondents with responsibility for technology selection strategy and PC device investment at their organization. All organizations surveyed had an environmental, social, and corporate governance (ESG) program and 95% had ESG criteria for purchasing end-user devices.
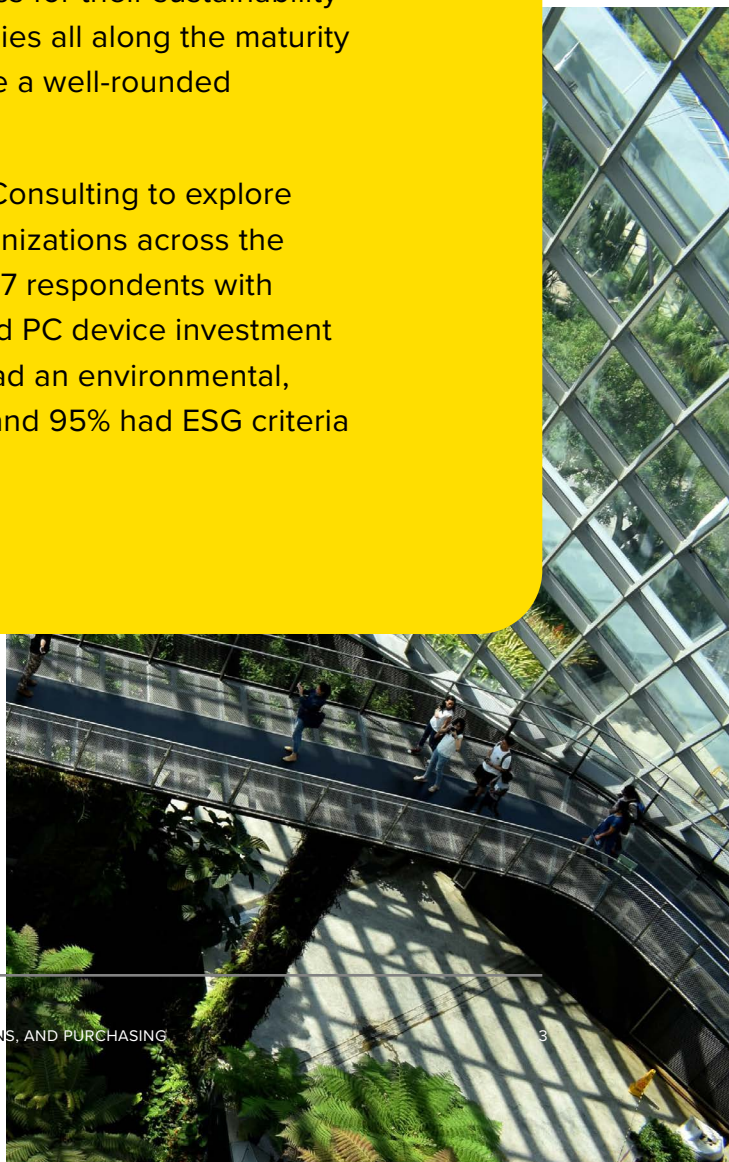
Key Findings

Sustainability is a top goal for the majority of surveyed decision-makers. Of the surveyed decision-makers, 64% noted that expanding their sustainability initiatives to address ESG goals is a critical or high priority. Sustainability encompasses many initiatives — from reducing scope 1 and 2 emissions to auditing supply chains — and ITDMs are increasingly recognizing that they play a critical role in hitting their organizations' top goals.

Over half of decision-makers noted that their organizations' end-user device purchaser plays a vital role in meeting sustainability goals. Specifically, these purchasers are tasked with evaluating the sustainability vendors they work with, mandating certain vendors meet specific environmental requirements, and evaluating the supply for their products. With such a wide scope of responsibility, it's critical that ITDMs engage many parts of their organization for successful implementation of sustainability efforts.

Employee recruitment is a top driver of sustainable PC purchasing decisions. Forty percent of PC-purchasing decision-makers surveyed noted that attracting staff that make employment choices based on sustainability-focused corporate values directly impacts their device purchasing decisioning. It's critical that ITDMs select sustainable PC devices to retain and recruit top talent and drive a positive employee experience. In particular, ITDMs are looking for more durable PCs and easily recyclable and/or reusable components.

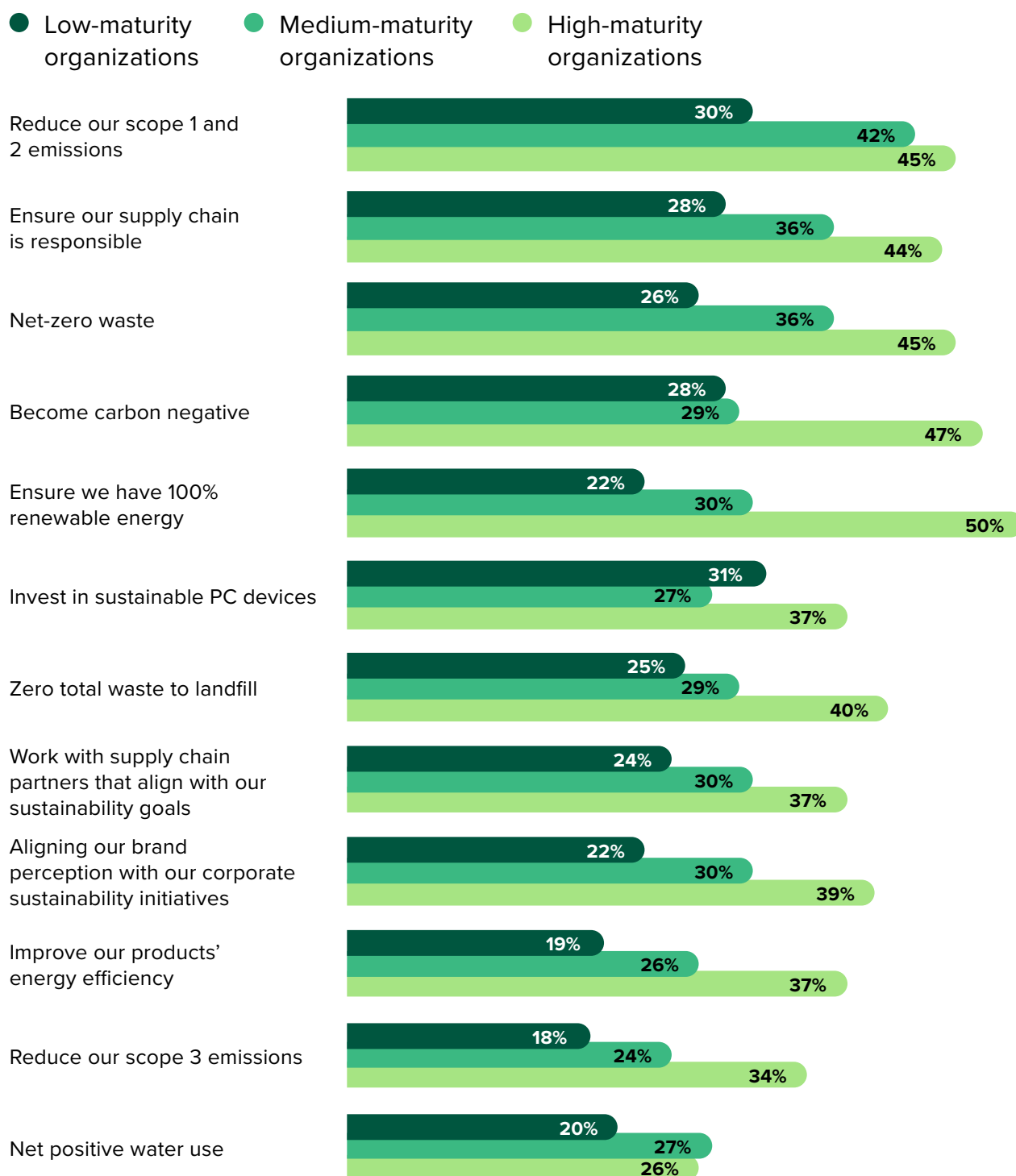# Sustainability Is A Top Goal For Organizations Surveyed

Across the globe, decision-makers are recognizing that sustainability is a key issue in their lifetimes. In fact, one in five security decision-makers noted that corporate social responsibility and environmental sustainability risks are primary concerns for their organization, according to Forrester's 2020 security survey.[1] Sustainability builds trust, increases resilience, and opens new markets — and advanced organizations are capitalizing on this to grow.[2]

- **Nearly two-thirds of respondents surveyed noted that expanding their sustainability initiatives was a top organizational goal over the next 12 months.** Sixty-four percent of respondents noted that their organizations consider expanding their sustainability initiatives to address ESG goals a critical or high priority; only 5% noted that it was a low priority.

- **On average, firms are setting four discrete sustainability goals for the next five years.** The most common goals set for the next five years are reducing scope 1 and 2 emissions, ensuring their supply chains are responsible, achieving net-zero waste, and ensuring they have 100% renewable energy.[3] When looking at individual regions, Asia Pacific (APAC) organizations are most commonly concerned with supply chains — ensuring they are working with supply chain partners that align with their goals, making sure their supply chain is responsible, and achieving net-zero waste. Prioritization of supply chain initiatives aligns with the fact that many supply chains run through the APAC region. On the other hand, North American organizations were more concerned with energy efficiency — ensuring renewable energy and improving products' energy efficiency. This reflects the priority focus on resource efficiency among these firms (see Figure 1).

As organizations embark on their sustainability journeys, it's imperative that they learn from high-maturity organizations. We define these organizations as meeting four criteria: 1) setting and expanding their ESG strategies and sustainability initiatives are critical or high priorities, 2) including many teams in setting and executing sustainability goals, 3) using many

Figure 1

"To the best of your knowledge, what are your organization's top sustainability goals for the next five years?"

● Low-maturity organizations   ● Medium-maturity organizations   ● High-maturity organizations

Reduce our scope 1 and 2 emissions
- 30%
- 42%
- 45%

Ensure our supply chain is responsible
- 28%
- 36%
- 44%

Net-zero waste
- 26%
- 36%
- 45%

Become carbon negative
- 28%
- 29%
- 47%

Ensure we have 100% renewable energy
- 22%
- 30%
- 50%

Invest in sustainable PC devices
- 31%
- 27%
- 37%

Zero total waste to landfill
- 25%
- 29%
- 40%

Work with supply chain partners that align with our sustainability goals
- 24%
- 30%
- 37%

Aligning our brand perception with our corporate sustainability initiatives
- 22%
- 30%
- 39%

Improve our products' energy efficiency
- 19%
- 26%
- 37%

Reduce our scope 3 emissions
- 18%
- 24%
- 34%

Net positive water use
- 20%
- 27%
- 26%

Base: 607 global directors and higher with responsibility over technology selection strategy and device (PC/laptops) investment for their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021

standards and certificates, and 4) taking steps with their IT teams to make their companies more sustainable. There are key lessons that highly mature organizations can teach others that are just embarking on their sustainability journeys.
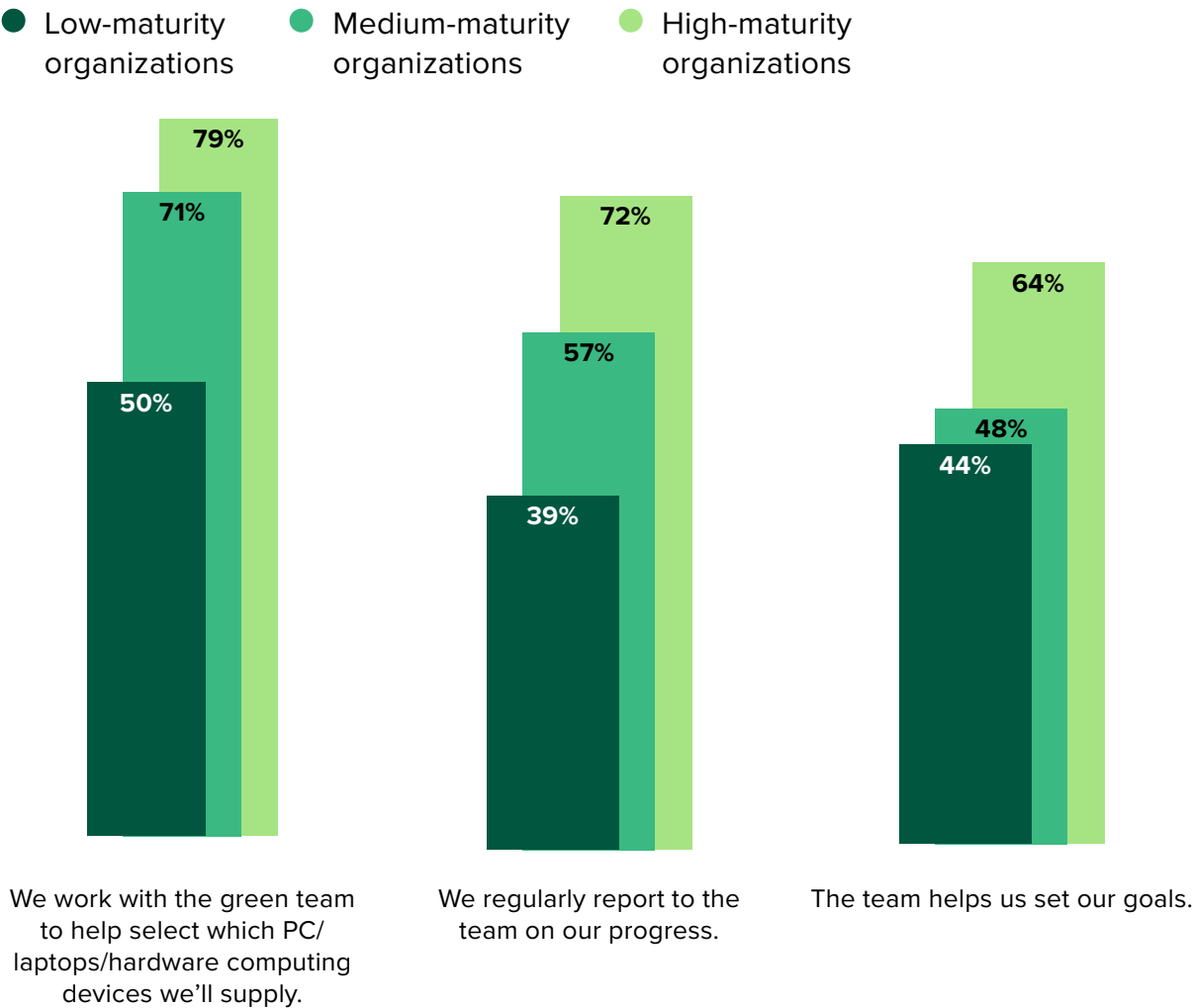
Engage Many Teams To Set And Execute Your Sustainability Goals

Over one-third of respondents noted that their top organizational challenge in executing sustainability goals is managing the multiple parties involved. Additionally, more than one-third noted that they lack the internal processes to manage their goals well. Success requires involving many voices in setting and executing sustainability goals — and highly mature organizations involve the most voices. Despite the difficulty, it's important that organizations involve input from across the business when planning their sustainability initiatives.

- **On average, firms involve three teams in setting sustainability goals and executing on sustainability initiatives.** The most common teams involved in setting sustainability goals — sustainability teams, compliance teams, and IT teams — are also often the most common teams involved in fulfilling those goals for the next five years. Crucially, only about one-third of surveyed organizations involve an employee-led green team in setting or fulfilling their goals.

- **High-maturity organizations are 28% more likely to involve an employee-led green team in their sustainability goals.** Over two-thirds of highly mature organizations involve their employee-led green team in key decisions. In fact, employee green teams play a critical role in PC device selections: nearly 80% of ITDMs at highly mature organizations that have employee-led green teams noted that their IT departments work with green teams to select which PCs, laptops, and/or hardware computing devices they'll supply. Additionally, 64% of ITDMs at highly mature organizations noted that the green team helps set their goals and 72% indicated that they are regularly reporting on the IT department's sustainability progress to the green team (see Figure 2). Highly mature organizations maximize the impact of their employee-led green teams on setting and fulfilling their sustainability goals, and it's critical that companies of all sizes and maturities are standing up employee-led green teams.

- **ITDMs play a critical role in executing on sustainability goals.** Over half of organizations noted that their end-user device purchaser plays

a vital role in meeting sustainability goals. Nearly 60% of purchasers are tasked with evaluating the sustainability of the vendors they work with, 51% are in charge of mandating certain metrics from their vendors, and 51% evaluate the supply chain sustainability of their products. Purchasers at highly mature organizations are involved in nearly two times as many tasks as those at low-maturity organizations.

Figure 2

"How does the employee-led green team influence your IT/procurement department's PC, laptop, and/or hardware computing device selection process?"

● Low-maturity organizations   ● Medium-maturity organizations   ● High-maturity organizations

79%	**72%**	**64%**
71%	**57%**	**48%**
50%	**39%**	**44%**
We work with the green team to help select which PC/laptops/hardware computing devices we'll supply.	We regularly report to the team on our progress.	The team helps us set our goals.

Utilize Your Vendors For Reporting And Compliance

Nearly 50% of surveyed decision-makers noted that the top externally focused challenge in executing sustainability goals is managing the multinational needs of each country in which they operate and/or do business. Additionally, over one-third of respondents indicated that they are struggling to understand and prepare for the changing policy requirements. That's no surprise, as regulations, requirements, and expectations are ever-changing across the globe. Our study found that:
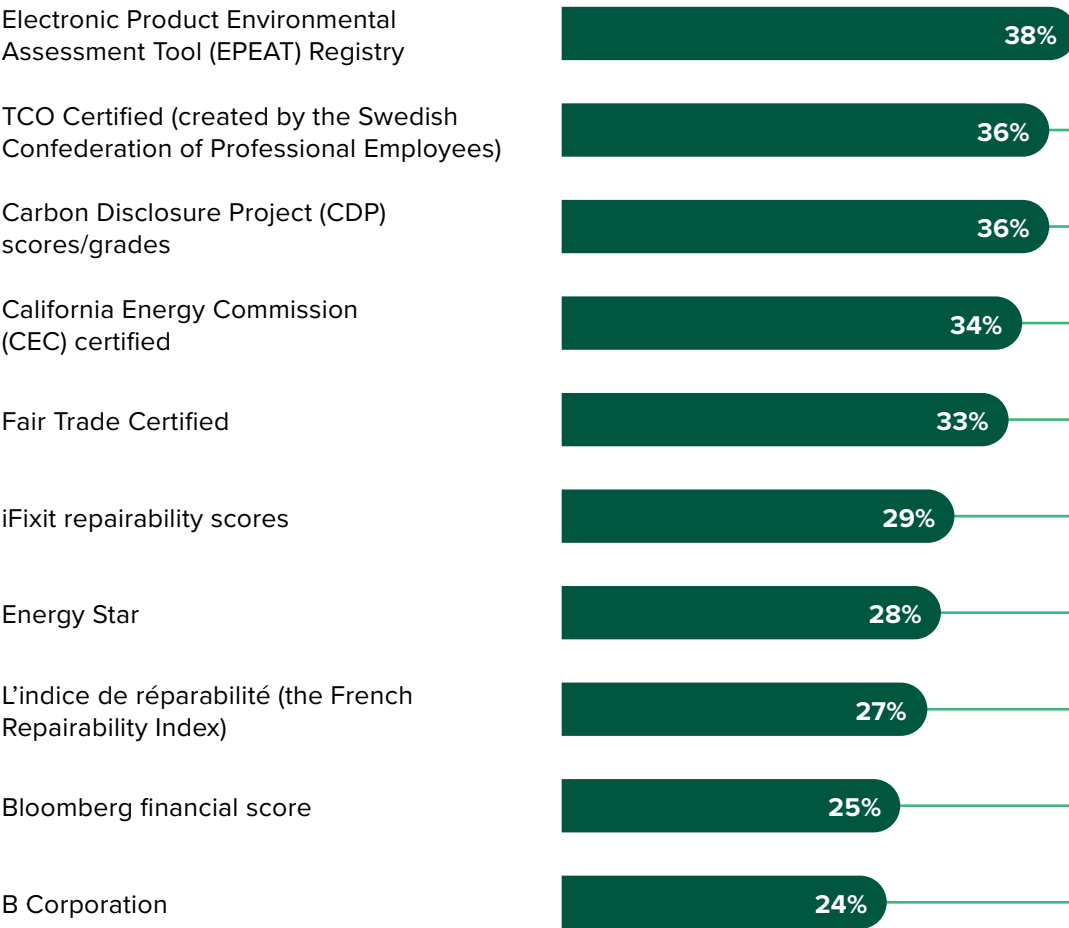
- **On average, decision-makers look at three different ratings/standards when making a purchasing decision.** The most common standards are the electronic product environmental assessment tool (EPEAT) registry, the Swedish Confederation of Professional Employees (TCO) certification, and CDP (formerly known as the Carbon Disclosure Project) scores (see Figure 3). Further underscoring the complexity of managing multinational needs, there were broad differences in the top three most used types of certificates in each region we surveyed. EMEA and APAC respondents use the Fair Trade Certification more often than North American respondents do; at the same time, North American decision-makers are 20% more likely to be utilizing California Energy Commission (CEC) certification in guiding decisions.

- **Firms are completing three discrete sustainability reports.** Eighty-six percent of organizations surveyed conduct some form of sustainability reporting. Those that report typically do so for three separate needs: country-level ESG regulatory requirements, local-level ESG regulatory requirements, and supply chain compliance reporting. Compiling the necessary data, insights, and feedback needed for each level of reporting is not only a time-consuming task, but also an increasingly common part of doing business across multiple geographies and regions.

- **To navigate the complex regulatory environment, high-maturity organizations look to vendors for help.** High-maturity organizations are 17% more likely to note that regulatory requirements from multinational organizations have a direct impact on their PC purchasing decisions. To help them make accurate evaluations of purchasing options, these highly

mature organizations are more likely to expect clear reporting metrics from the original equipment manufacturers (OEMs) that they work with. ITDMs should not hesitate to lean on vendors for the comprehensive reporting requirements that they need.

Figure 3

"Which of the following standards, certificates, and/or ratings do you look for when making PC purchasing decisions?"

(Select all that apply.)

Electronic Product Environmental Assessment Tool (EPEAT) Registry	38%
TCO Certified (created by the Swedish Confederation of Professional Employees)	36%
Carbon Disclosure Project (CDP) scores/grades	36%
California Energy Commission (CEC) certified	34%
Fair Trade Certified	33%
iFixit repairability scores	29%
Energy Star	28%
L'indice de réparabilité (the French Repairability Index)	27%
Bloomberg financial score	25%
B Corporation	24%

Base: 607 global directors and up with responsibility over technology selection strategy and device (PC/laptops) investment for their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021
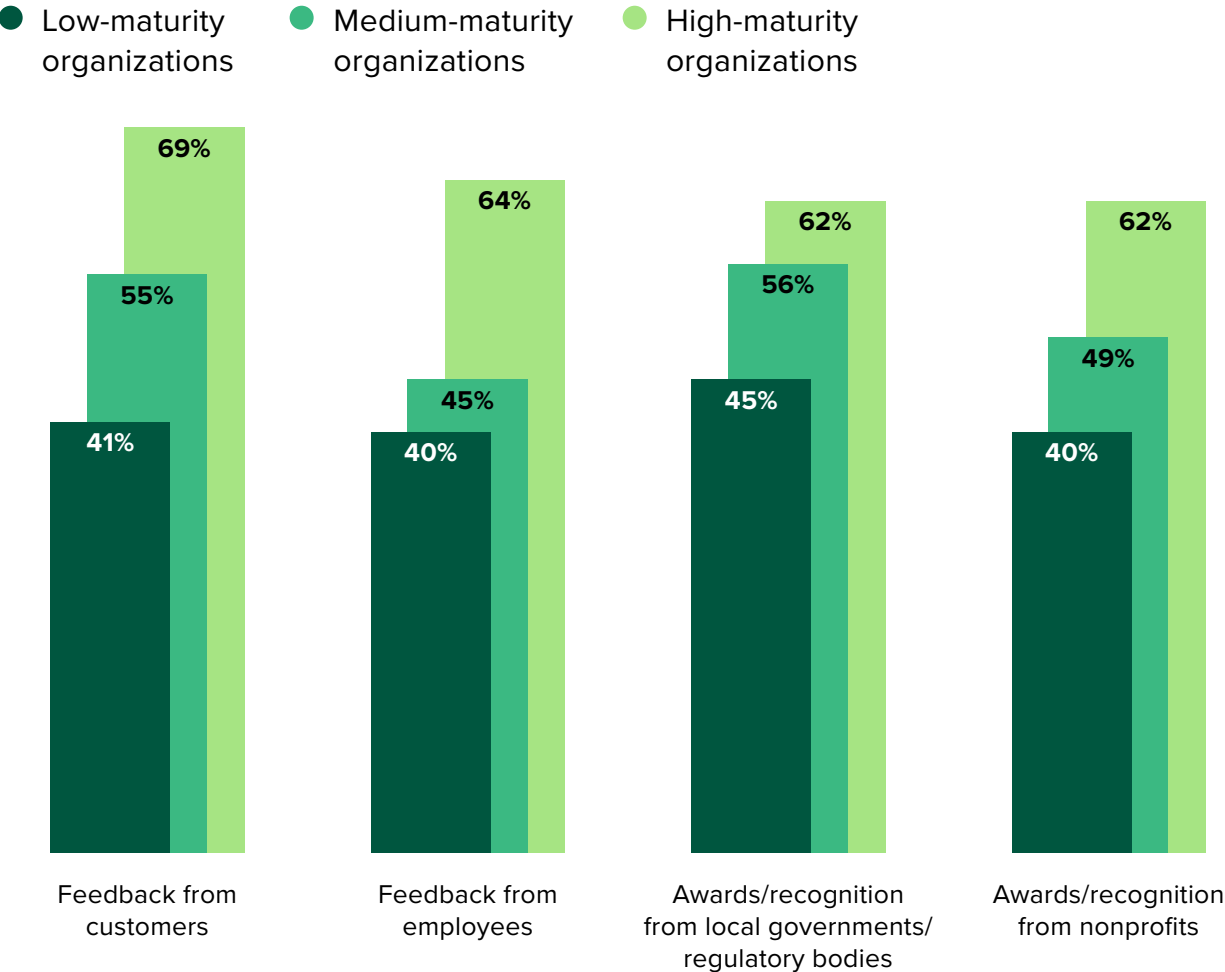
Engage Employees In A Virtuous Cycle

When selecting sustainable PC devices for their workforce, it's imperative that ITDMs engage their employees throughout the process, as PCs have a direct impact on employee experience. Over one-third of ITDMs surveyed noted that their employees are concerned about the quality of refurbished laptops. At the same time, 38% noted that they struggle to communicate the value of their sustainability progress to their employees.

Leaving your employees in the dark on your sustainability efforts not only leaves them frustrated but also hinders you from making the biggest impact possible.

- **Employee recruitment is a top driver of sustainable PC purchasing decisions.** Forty percent of PC-purchasing decision-makers surveyed noted that attracting employees that make choices based on sustainability-focused corporate values directly impacts their decisions. It's no surprise that employees are increasingly vocal about their sustainability expectations — in Forrester's March 2021 Global Trust Imperative Survey, 77% of online adults in India, 63% in Singapore, 52% in the UK and France, and 46% in the US said they believe that brands should take a stand on climate change.[4]

- **However, less than half of organizations solicit feedback from their employees to measure the success of their sustainability efforts.** There is a clear disconnect between what ITDMs say about the importance of employees' perspectives on the organization's sustainability efforts and what they actually do to collect staff feedback. In fact, the most common metrics used to indicate success of sustainability efforts is feedback from customers and awards or recognition from local governments and regulatory bodies. These are from external validators rather than the internal actors most impacted by sustainability decisions.

- **High-maturity organizations are 24% more likely to solicit feedback from their employees.** To build a truly mature sustainability practice, it's critical that ITDMs think not only of employee acquisition but also of employee retention by involving employees throughout the

process of setting and executing goals. PCs are a key driver of a firm's sustainability efforts and have a direct impact on its sustainability goals. PCs are also a key driver of employee experience. Therefore, employees are a critical component of the PC-sustainability virtuous cycle. Nearly two-thirds of high-maturity organizations recognize this fact and use feedback from employees as a key metric to measure the success of their sustainability efforts. This is ahead of externally focused KPIs such as awards from local governments or recognition from nonprofits (see Figure 4).

Figure 4

"Which of the following metrics/KPIs do you track to measure the success/ business impact of making sustainable changes?"

● Low-maturity organizations   ● Medium-maturity organizations   ● High-maturity organizations

	Feedback from customers	Feedback from employees	Awards/recognition from local governments/ regulatory bodies	Awards/recognition from nonprofits
Low-maturity	41%	40%	45%	40%
Medium-maturity	55%	45%	56%	49%
High-maturity	69%	64%	62%	62%

Base: 607 global directors and up with responsibility over technology selection strategy and device (PC/laptops) investment for their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021

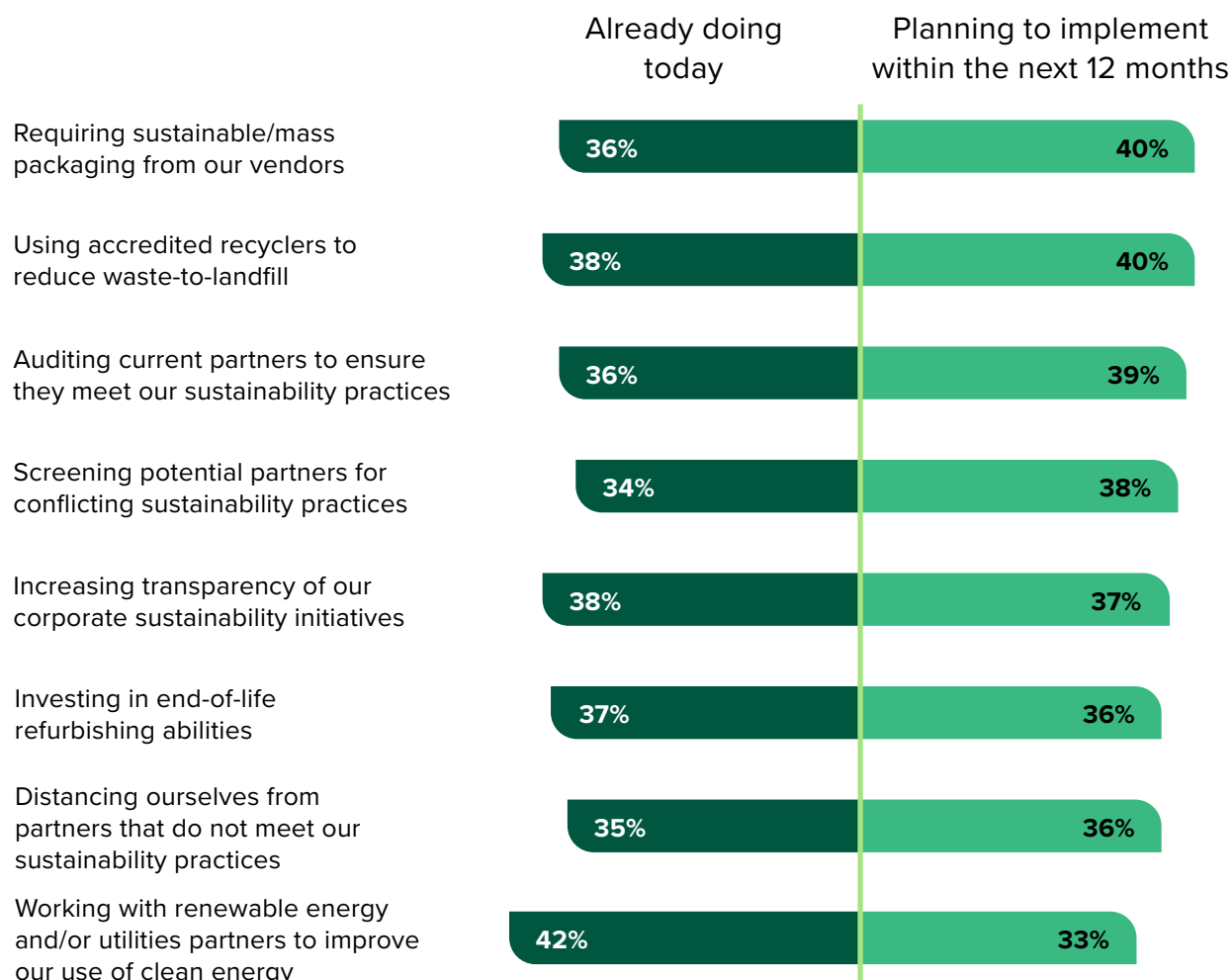## PC Device Vendors Play A Critical Role In Hitting Sustainability Targets

End-user devices are a critical component of an organization's sustainability goals. Ensuring the PC device supply chain is well-vetted and responsible is a key part of many organizations' top goals for the next five years. In fact, nearly one in three organizations surveyed indicated that investing in sustainable PC devices is a top sustainability goal for them. PC vendors must evolve to keep up with ITDMs ever-growing needs.

- **The average firm surveyed reassesses its sustainability goals every three years.** Highly mature organizations, however, are reassessing their goals more consistently — on average, every two years — compared to low-maturity organizations doing so every four years. As technologies and approaches continue to change, it's imperative that ITDMs stay ahead of the trends when making big IT purchasing decisions. Looking ahead, high-maturity organizations are, on average, setting five key sustainability goals for themselves, whereas low-maturity organizations are only setting three. Additionally, over one-third of high-maturity firms are investing in sustainable PC devices, compared to just one-quarter of low-maturity firms.

- **Over three-quarters of businesses will require sustainable packaging by 2023.** Today, 36% of organizations already require that their vendors use mass packaging and/or sustainable packaging; over the next 12 months, that number is expected to grow to 76%. Additionally, 75% of organizations will be auditing their current partners to ensure they meet their sustainability goals, and 72% are planning to screen potential partners for conflicting sustainability practices (see Figure 5). Sustainability is not just a flash in the pan — it is an ongoing, ever-evolving priority for organizations across the globe as more countries and companies set ambitious commitments to climate action, emissions reductions, and carbon neutrality.

- **Specifically, PC device purchasers are expecting better durability and easily recyclable components from their vendors by 2030.** Nearly 60% of ITDMs expect better durability from their vendors by 2030 to eliminate the need to constantly replace broken devices. Additionally,

55% expect easily recyclable components and 53% expect easily reusable components. This means that when there are issues with the PC devices, ITDMs are better able to reuse components without having to throw away the whole device. PCs are a critical piece of the puzzle when it comes achieving zero total waste to landfill.

Figure 5

"Which of the following, if any, steps are you taking as an IT organization within your company to be more sustainable?"

	Already doing today	Planning to implement within the next 12 months
Requiring sustainable/mass packaging from our vendors	36%	40%
Using accredited recyclers to reduce waste-to-landfill	38%	40%
Auditing current partners to ensure they meet our sustainability practices	36%	39%
Screening potential partners for conflicting sustainability practices	34%	38%
Increasing transparency of our corporate sustainability initiatives	38%	37%
Investing in end-of-life refurbishing abilities	37%	36%
Distancing ourselves from partners that do not meet our sustainability practices	35%	36%
Working with renewable energy and/or utilities partners to improve our use of clean energy	42%	33%

Base: 607 global directors and up with responsibility over technology selection strategy and device (PC/laptops) investment for their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021
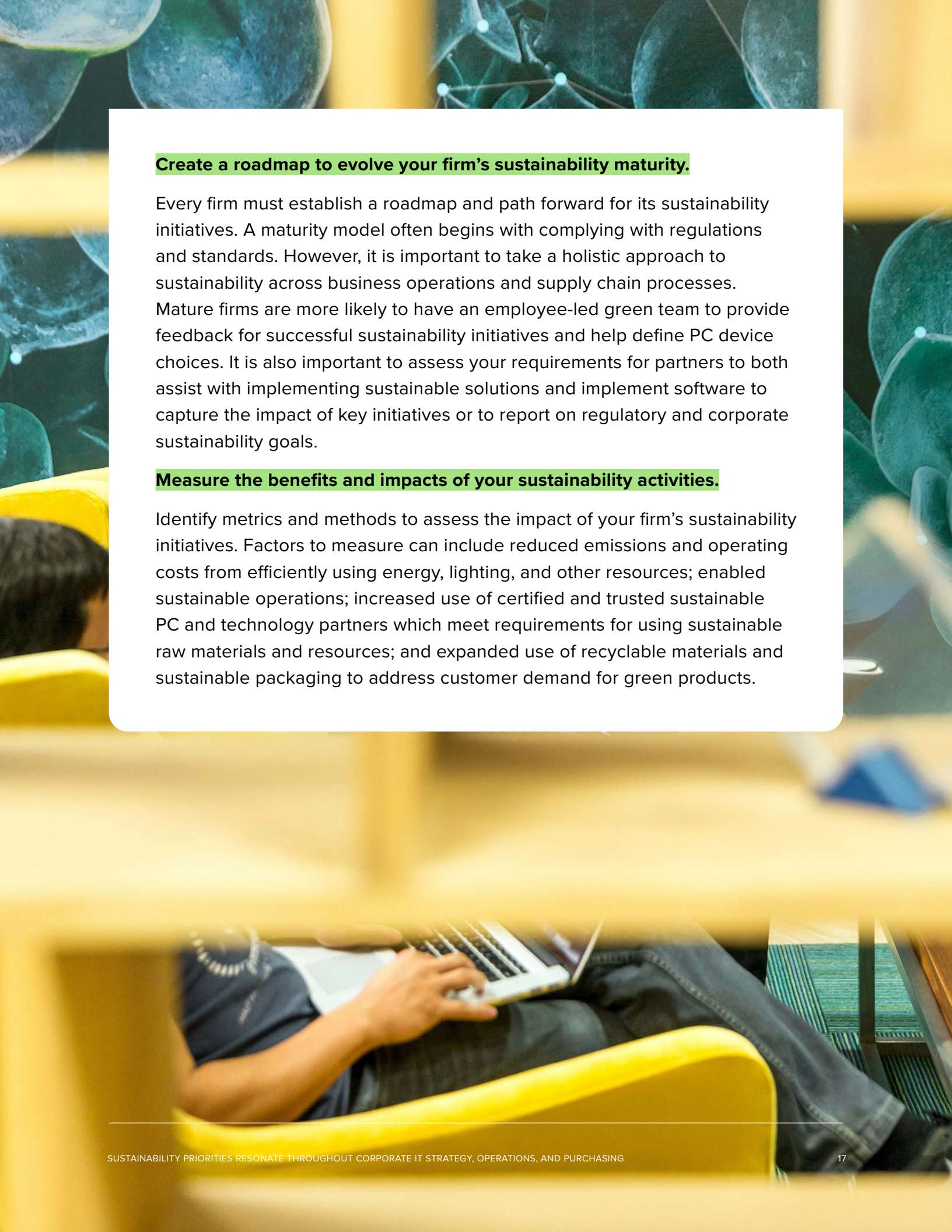
Key Recommendations

Enterprises spanning many vertical markets are addressing sustainability strategies. IT and business stakeholders must proactively identify relevant sustainability initiatives and clearly define a roadmap spanning key operational processes, corporate activities, and technology purchasing. It is also important to address sustainability reporting that adheres to industry, geographic, and corporate regulatory requirements; avoids penalties; monitors sustainability goal contributions; and increases transparency to build trust with stakeholders. Forrester's survey of stakeholders participating in sustainability and PC purchasing decisions yielded key recommendations:

Address pressure from employees and key stakeholders to prioritize sustainability.

Stakeholders spanning many roles demand sustainability from enterprises in all vertical markets. Regulators establish targets and specific requirements for sustainability elements at a regional and global level, and investors demand climate risk disclosures and improved sustainability management from firms. Employees are also using sustainability initiatives to guide decisions on where to work. Ensuring a sustainably responsible PC supply chain is becoming an emerging priority for many organizations.

Assess your firm's sustainability priorities spanning products, processes, and software.

A comprehensive sustainability assessment requires firms to consider a wide array of individual initiatives. For example, product lifecycle sustainability initiatives include sustainable PC and technology design, using environmentally friendly materials, and assessing products in the circular economy. Other important sustainability activities include managing carbon, water, energy, and environmental resources, as well as monitoring scope 3 emissions in the supply chain. Consider the critical role of solutions to help you break down data silos, capture diverse data sources, and report on the local, regional, and global impacts of your sustainability initiatives including technology purchasing impacts and supply chain operations.

Create a roadmap to evolve your firm's sustainability maturity.

Every firm must establish a roadmap and path forward for its sustainability initiatives. A maturity model often begins with complying with regulations and standards. However, it is important to take a holistic approach to sustainability across business operations and supply chain processes. Mature firms are more likely to have an employee-led green team to provide feedback for successful sustainability initiatives and help define PC device choices. It is also important to assess your requirements for partners to both assist with implementing sustainable solutions and implement software to capture the impact of key initiatives or to report on regulatory and corporate sustainability goals.

Measure the benefits and impacts of your sustainability activities.

Identify metrics and methods to assess the impact of your firm's sustainability initiatives. Factors to measure can include reduced emissions and operating costs from efficiently using energy, lighting, and other resources; enabled sustainable operations; increased use of certified and trusted sustainable PC and technology partners which meet requirements for using sustainable raw materials and resources; and expanded use of recyclable materials and sustainable packaging to address customer demand for green products.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 607 decision-makers at the director level and up for organizations in North America, EMEA, and APAC to evaluate the importance of environmental responsibility and sustainability for the growth of an organization. Survey participants included decision-makers responsible over technology selection strategy and device (PC/laptops) investment for their organization. Questions provided to the participants asked about sustainability on the workplace. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in October 2021 and was completed in November 2021.

Appendix B: Demographics

COUNTRY	
United States	**17%**
United Kingdom	**17%**
Japan	**17%**
Germany	**17%**
Australia/New Zealand	**17%**
France	**16%**

MATURITY CUT	
High maturity	**26%**
Medium maturity	**47%**
Low maturity	**27%**

POSITION/DEPARTMENT	
IT (90%)	**90%**
Procurement (10%)	**10%**

Note: Percentages may not total 100 because of rounding.

COMPANY SIZE	
100 to 499 employees	**13%**
500 to 999 employees	**21%**
1,000 to 4,999	**33%**
5,000 to 19,999 employees	**23%**
20,000 or more employees	**10%**

RESPONDENT LEVEL	
C-level executive	**32%**
Vice president	**33%**
Director	**35%**

MANAGING END-USER COMPUTING HARDWARE	
We manage all of our end-user hardware computing needs with a dedicated in-house team.	**42%**
We manage most of our end-user hardware computing needs with a dedicated in-house team, but we outsource some to a third-party vendor or consultant.	**58%**

Appendix C: Endnotes

[1] Source: Forrester Analytics Business Technographics® Security Survey, 2020.
[2] Source: "Guide Your Sustainability Program With The Forrester Sustainability Maturity Model," Forrester Research, Inc., October 27, 2021.
[3] Scope 1 and 2 emissions are defined as emissions from sources controlled by your organization and indirect emissions from the purchase of electricity, steam, heat, or cooling.
[4] Source: Forrester's March 2021 Global Trust Imperative Survey, 2021.

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