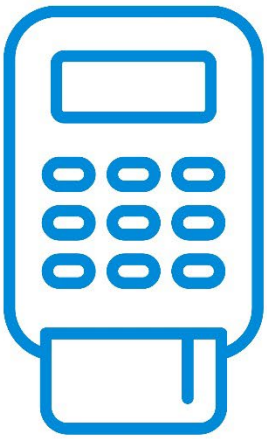
POINT-OF-SALE DEVICES

DRAFT EPEAT® Product Category Proposal for Public Comment

DRAFT

November 18, 2025



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Contents

Figures

Tables

1. Introduction

1.1 Purpose

As part of GEC's deep commitment to building criteria in community with our key stakeholders, we are issuing this Product Category Proposal and State of Sustainability Research document to seek stakeholder input and guidance. We are also seeking Development Partners for this new product category, and request that any entity interested in partnering with GEC on this endeavor indicate their interest in their comments so we can contact them with more details on what being a Development Partner entails.

1.2 Overview

Point of Sale (POS) systems are an integral part of business operations, especially in the retail/grocery, restaurant, healthcare, and hospitality sectors, as illustrated in the market analysis section of this document. GEC has also identified uses of POS systems in the financial sector and by governments for applications such as processing parking garage fees, building permits and recreation department payments. A POS system is the hardware and software that helps to capture, store, share, and report data related to processing of sales transactions [1]. In addition to sales transactions, POS systems track inventory, manage customer data, generate reports, and integrate with other business systems [7]. POS software is the operating system that integrates the POS hardware components and ensures that they work in sync to provide seamless sales transactions. POS hardware components include kiosks, handheld mobile devices, tablets, smartphones, computer desktops and touch screen displays which may be paired with peripherals such as debit/credit card readers or scanners, barcode scanners, cash drawers, keyboards, mice and printers [4].

As with other ICT devices, POS hardware is composed of components such as memory cards, processors and printed circuit boards, known to have a high production environmental footprint. E-waste, or waste from discarded electronic POS devices, also causes significant environmental impacts [6]. Hence, POS systems providers have been highlighting the need for environmentally preferable, low embodied carbon, energy-efficient POS hardware designs, with longevity and end-of-life recyclability features [5][6]. POS hardware components are also part of the international electronics supply chain which requires due diligence to address potential adverse human rights impacts during the material extraction and manufacturing process, especially in high-risk regions and countries.

Purchasers have indicated an interest in accessing POS devices which have reduced sustainability impacts. Demand drivers identified through GEC interviews include regulatory compliance, consumer preferences driving adoption of sustainable materials in hardware design, widespread adoption of sustainability features by manufacturers and helping purchasers to meet net zero and sustainability impact reduction goals. This appears to be across the retail, hospitality and banking industries.

Therefore, GEC is proposing to add a new EPEAT product category for POS devices. The POS device or terminal, which is the hardware component of POS systems on which the POS software is installed [2] would be eligible for EPEAT registration. For POS devices that can be interfaced with peripheral devices such as bar code scanners, receipt printers, and customer displays [3], the peripheral may be included in the EPEAT device registration if it is integral to its operation. Details on the different types of POS devices available in the market and GEC's proposed approach for including them in the EPEAT program are provided in Section 1.3.

This Product Category Proposal analyzes the market, presents State of Sustainability Research and establishes the business case for moving forward with an EPEAT product category for POS devices. Details on how GEC selects technology categories for EPEAT are also publicly available in GEC Selection of Product Categories.

GEC welcomes stakeholder comments on all aspects of this proposal and in particular, GEC is seeking stakeholder input on the following:

- Product definitions, specifically the applicability of existing ENERGY STAR® definitions to POS products
- New definitions and taxonomies for POS products not addressed by ENERGY STAR
- Material composition data, in particular for mobile handheld devices and kiosks
- Sustainability impact data, in particular for mobile handheld devices and kiosks
- Sharing of additional purchaser interest in procuring EPEAT registered POS hardware devices

1.3 State of Sustainability Research

This Product Category Proposal includes GEC State of Sustainability Research, which assesses the environmental and social impacts of Point of Sale (POS) devices across the product life cycle to inform potential inclusion of this category under the EPEAT ecolabel. The State of

Sustainability Research also identifies how specified sustainability impacts can be reduced through measures such as product design and supply chain engagement to improve manufacturing and labor practices. GEC recently published State of Sustainability Research for ICT products, addressing four priority sustainability impact categories: Climate Change Mitigation [10], Sustainable Use of Resources [11], Reducing Chemicals of Concern [12] and Responsible Supply Chains [13]. The data and analyses in this POS State of Sustainability Research document serve as the scientific basis for the development of sustainability performance criteria for EPEAT ICT product categories. This previous research is directly applicable to ICT products, including POS devices. This document discusses how past research applies to POS devices and also provides further data and analysis specific to different POS device types. The data and analyses in this document serve as the scientific basis for the establishment of sustainability performance criteria for an EPEAT POS product category.

1.4 Product Overview

POS market studies classify POS devices as fixed and mobile devices. Fixed POS devices are conventional POS terminals with a screen attached to the control unit. They are larger in size and are not portable. Mobile POS devices are devoted wireless devices, tablets, or smartphones which perform the functions of an electronic point of sale terminal or cash register.

Different types of fixed POS devices include kiosks (computerized check-out systems and self-serve) & touch screen terminals, all-in-one desktop POS systems and PC-based (desktops). Different types of mobile POS devices include tablets and other handheld POS devices. A tablet POS device can function as a stationary POS terminal or can be utilized to process tableside orders, line-busting applications, pay-at-the-table, and more.

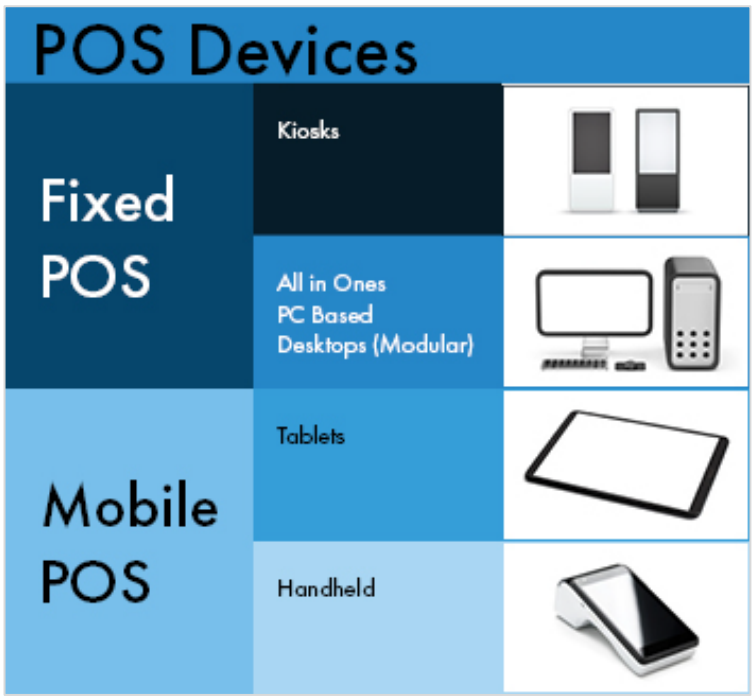

Figure 1: Images of different types of fixed and mobile POS devices.

Figure 1 shows images of the different types of POS devices available on the market. The U.S. Environmental Protection Agency's ENERGY STAR Computers Specification Version 9.0 definitions for All in Ones (AIOs), desktops and tablet devices, provided below, are directly applicable to POS devices [14].

Desktop Computer: A Computer whose main unit is designed to be located in a permanent location, often on a desk or on the floor. Desktop computers are not designed for portability and are designed for use with an external display, keyboard, and mouse. Desktop computers are intended for a broad range of home and office applications, including point of sale applications.

Integrated Desktop Computer: A Desktop Computer in which the computing hardware and display are integrated into a single housing, and which is connected to AC mains power through a single cable. Integrated Desktop Computers come in one of two possible forms: (a) a system where the display and computer are physically combined into a single unit; or (b) a system packaged as a single system where the display is separate but is connected to the main chassis by a dc power cord and both the computer and display are powered from a single power supply. As a subset of Desktop Computers, Integrated Desktop Computers are typically designed to provide similar functionality as Desktop systems

Portable All-In-One Computer: A computing device designed for portability that meets all of the following criteria:

a) Includes an integrated display with a diagonal size greater than or equal to 17.4 inches;

b) Lacks a keyboard integrated into the physical housing of the product in its as shipped configuration;

b) Includes and primarily relies on touchscreen input; (with optional keyboard);

c) Includes wireless network connection (e.g. Wi-Fi, 3G, etc.); and

d) Includes an internal battery.

Tablet: A computing device designed for portability that meets all of the following criteria:

a) Includes an integrated display with a diagonal size greater than 7.0 inches and less than 17.4 inches;

b) Lacks an integrated, physically attached keyboard in its as shipped configuration;

c) Includes and primarily relies on touchscreen input (with optional keyboard);

d) Includes and primarily relies on a wireless network connection (e.g., Wi-Fi, 3G, etc.); and

e) Includes and is primarily powered by an internal battery (with connection to the mains for battery charging, not primary powering of the device).

However, Kiosk type POS and handheld POS devices are not defined by ENERGY STAR. Kiosk type POS devices include POS components and an enclosure which consists of a frame, a display, and a mounting system. The enclosure or physical housing is often made of steel and/or plastics [8].

Handheld POS devices are mobile devices which have some form factors similar to those of mobile phones and tablets but they generally weigh more than a typical smartphone.

GEC welcomes stakeholder comments on the applicability of these definitions and others to POS devices, as well as suggested alternative definitions.

Figure 2 presents images of a few handheld POS devices from different brands for reference. The average product weight and screen size of handheld POS devices are typically less than that of tablets. The estimated average weight of handheld POS devices is 370 g (Table 1). Mobile POS tablet devices are excluded from the scope of the ENERGY STAR specification for Computers (version 9) [14].

Figure 2: Images of handheld POS devices from various brands.

Product	Weight (g)
Square Terminal - 8.17044E+11	417
Ingenico - Desk/3500	340
Clover - Flex Pocket	340
Verifone - e280s	224
Verifone – Victa Mobile	363
Multzo – Q2i	364
Abanopi – Q2	462
Chase POS Terminal	450
AVERAGE	370

Table 1: Handheld POS product weight and estimated average.

2. Market Analysis

2.1 Market size and key players

The global POS device terminal market was valued at USD 113 billion in the year 2024. This market size includes the three segments of the POS market, with POS hardware representing 63% (USD 71 billion), POS software 24% (USD 27 billion) and POS services 13% (USD 15 billion) of the market. The overall POS market is expected to grow at a compound annual growth rate (CAGR) of 8% to reach USD 181 billion by 2030. The growing adoption of digital payment solutions, contactless transactions, and the expansion of retail and hospitality sectors, are considered the key drivers for POS market growth. In terms of regional market share, Asia Pacific dominated the POS systems global market in 2024 with almost 35% market share. North America held 26% while Europe had 25% of the global POS market share (Figure 3). The Middle East/Africa (MEA) and Latin America regions together held 14% of the total POS market share [4].

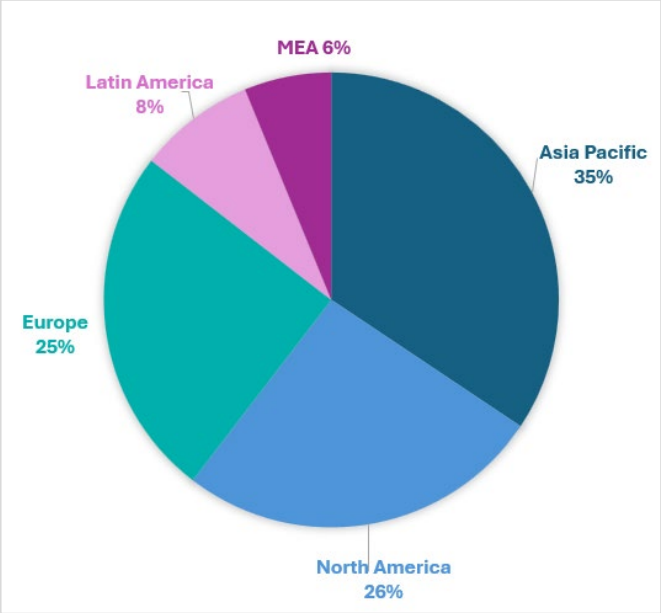

Figure 3: Regional POS market share in year 2024 [4].

With regard to product type, the fixed POS segment dominated the market with nearly 60% of the overall POS market share in 2024 (Figure 4). By 2030, the market share of the fixed POS device segment is expected to decline to 52%, and the mobile POS market share is predicted to grow from 40% to 48% in the same time period. Figure 4 further disaggregates the market share of fixed and mobile POS devices by device types. Within the fixed POS device market, kiosk type has 29% market share, which is equivalent to 17% of total POS market (including

hardware, software and services component of all POS types). In the mobile POS device market, tablets have 41% market share, while "other mobile devices", such as handheld devices constitute 59% of the mobile POS market [4].

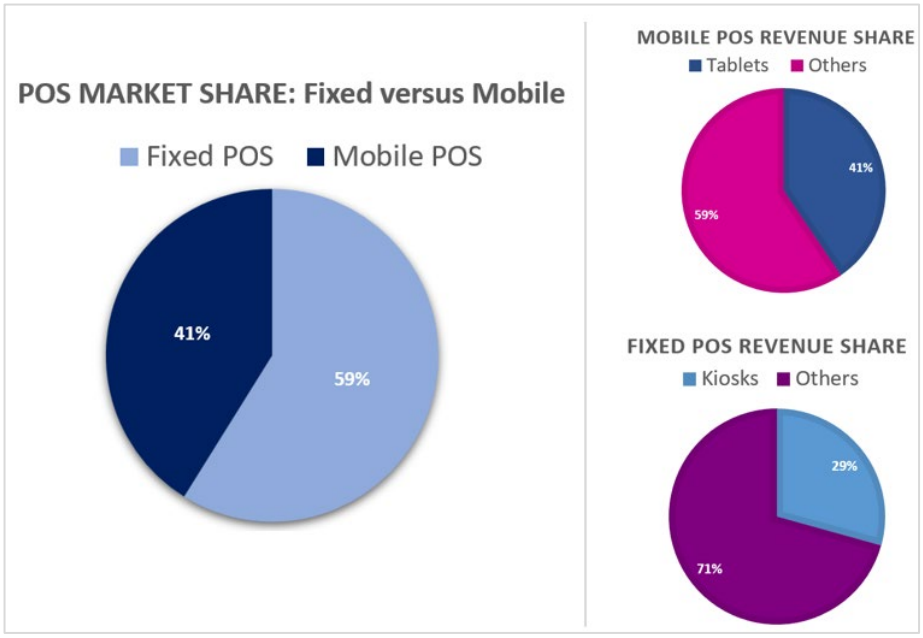

Figure 4: POS market share by device type in year 2024. [4]

Published POS market reports have identified some of the key POS hardware market players [4]. Table 2 lists the key POS hardware companies, their market share and estimated annual revenue based on the reported POS hardware market size of USD 71 billion. Clover and Worldline (Ingenico) are the top companies in the list with market shares of 5.4% and 4.4% respectively. It is noted, however, that due to lack of available data a major share of the market players, grouped together as 'Others' in Table 2, hold approximately 75% of POS hardware market revenue [4].

POS Hardware Companies	Market Share (%)	Estimated Annual Revenue (Million USD)
Clover	5.4%	3816
Worldline (Ingenico)	4.4%	3121
HP Development Company, L.P.	4.3%	3050
VeriFone Systems, Inc.	2.4%	1702
Samsung Electronic Co. Ltd	1.3%	922
Toshiba Tec Corporation	1.2%	851
Shopify	1.1%	780
NCR Corporation	1.1%	780
PAX Technology	1.1%	780
Oracle	1.0%	709
Diebold Nixdorf	1.0%	709
Fuji Electric Co., Ltd.	0.3%	213
Toast	0.3%	213
Square Inc.	0.2%	142
Lightspeed	0.1%	71
Others	74.9%	53125
Total Hardware Revenue (USD Million)		**70928**

Table 2. POS Hardware Companies Market Share [4]

2.2 POS End Use Sectors

The main sectors where POS systems are used are restaurants, retail, hospitality, healthcare, warehouses and entertainment sectors [4]. Among these, retail and restaurant sectors together hold more than 50% of end use market revenue share (Figure 5). The retail sector is the largest end use market for POS systems with over 30% market share. Warehouses and healthcare also hold significant end use market share, at 13% and 14% respectively.

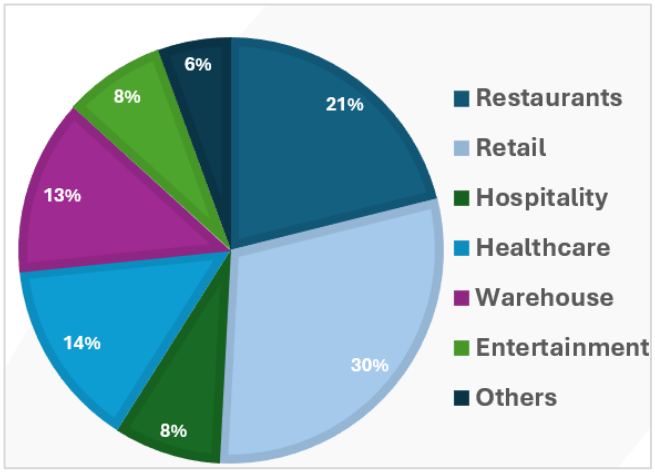

Figure 5: Global POS revenue share by end use markets, in 2024 [4].

Figure 6 further disaggregates the revenue share of various subsectors within each POS end use market. Figure 6 illustrates that within the retail market sector, supermarkets and

hypermarkets hold the biggest revenue share (48%) while within the restaurant sector, quick service restaurants (e.g., drive through) dominate (37%). Full-service restaurants also hold significant revenue share (28%). Within the hospitality end use sector, hotels are dominant with more than 50% of the POS revenue share. Cinemas (25%), amusement parks (22%) and stadiums (28%) stand out with significant revenue share, within the entertainment end use market. Within healthcare, pharmacies hold nearly 20% of POS revenue share. The other end use subsectors within healthcare include hospitals, clinics, diagnostic laboratories & imaging centers, nursing homes, assisted living & long-term care facilities (81%) [4].

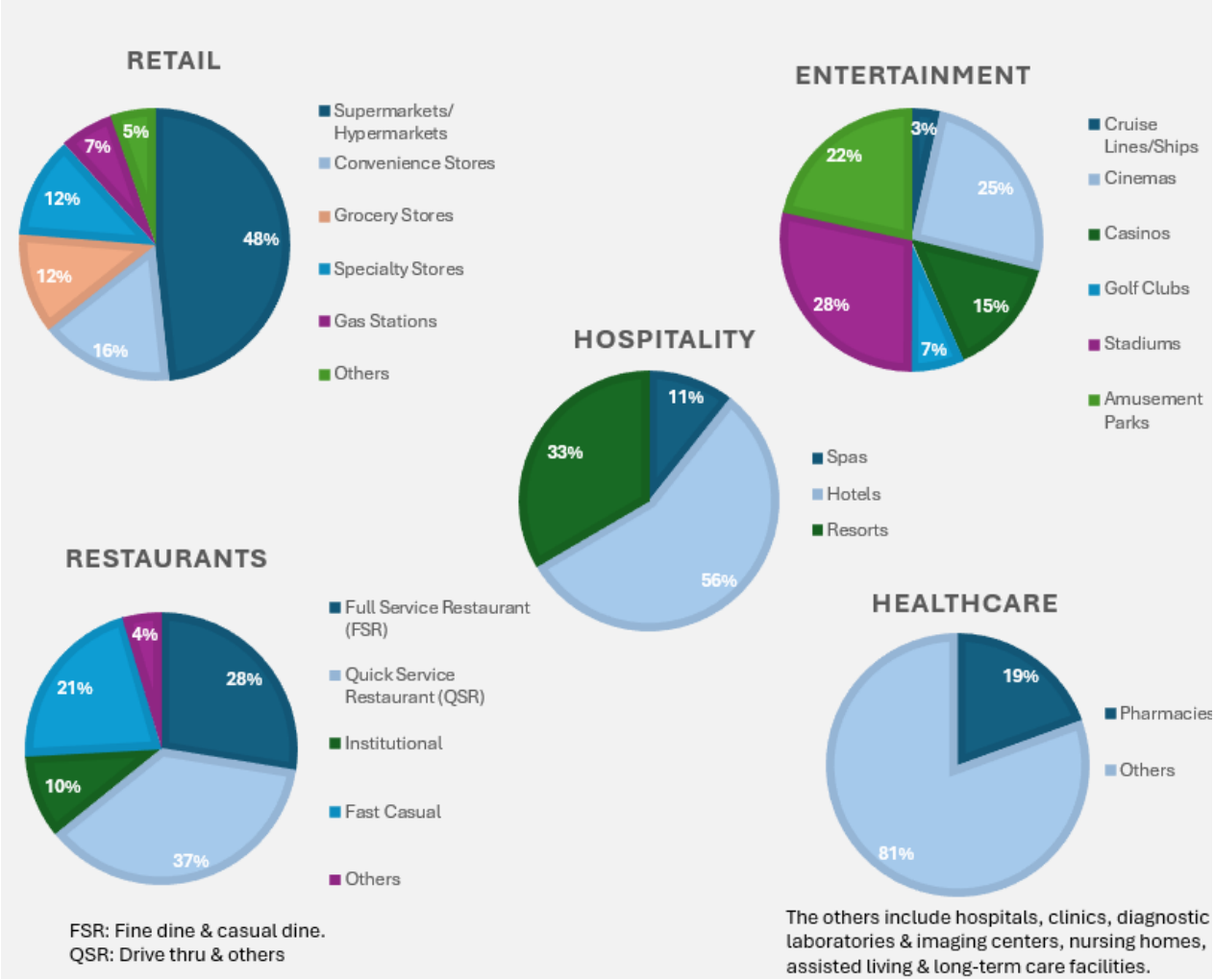

Figure 6: Global POS end use markets revenue share by subsector, in 2024 [4].

2.3 Stakeholder Interest

As part of building the business case for adding a new EPEAT product category, GEC investigates stakeholder interest. To identify stakeholder interest in POS products, GEC

conducted direct outreach to individual brands, trade organizations representing the banking, retail, grocery and healthcare sectors, and specific large purchasers in these sectors.

In addition to stakeholder interest, GEC also assesses the likelihood of product manufacturers seeking EPEAT registration for their products. In the case of POS, major manufacturers such as HP Inc, Lenovo and Samsung are already actively engaged with EPEAT and have EPEAT registered products in similar product categories, demonstrating their commitment to reducing sustainability impacts of their products.

GEC also interviewed POS brands known to have documented sustainability commitments.

3. Sustainability Impacts & Mitigation Strategies

GEC organizes its analysis of sustainability impacts, and the criteria aimed at reducing these impacts, into four priority impact areas of material importance to large-scale purchasers and producers of electronic products: climate change mitigation, sustainable use of resources, chemicals of concern and responsible supply chains, as described in the box below. This approach allows for a systematic analysis of data based on a unifying theme or metric to identify "hot spots" in the life cycle of the product or service, followed by a targeted examination of strategies that offer opportunities to reduce the identified life cycle impacts.

As mentioned in Section 1.2, GEC has previously published four State of Sustainability Research reports, one for each impact area, and has developed sustainability performance criteria for each of the sustainability impact modules [15][16][17][18]. POS device types such as all-in-one POS, modular (desktop) POS and tablets have form factors similar to existing EPEAT ICT products, for which the key impacts and mitigation strategies identified in the aforementioned research and the published EPEAT criteria for corresponding ICT products are

directly applicable. However, POS mobile handheld and POS fixed kiosk devices have unique form factors and therefore require further study of product composition, impact hotspots and mitigation strategies.

GEC welcomes input on the key sustainability impacts unique to POS Kiosks and handheld devices.

Handheld POS Devices:

As mentioned in section 1.3, handheld POS devices generally weigh less than 0.5 kg and they typically have screen sizes less than 7 inches. Published data on material composition or life cycle assessment of handheld POS devices are rare. We have presented below the one publicly available identified dataset on material inventory of a POS device, which is reported to weigh 308 g. (Table 3). The dataset shows that the POS device analyzed contains a plastic case, lithium battery, liquid crystal display (LCD), power supply, integrated circuits (ICs) and printed circuit boards (PCBs). A summary analysis of the dataset shows that in terms of materials, plastics are dominant, with total plastic weight contributing over 50% of the product weight. In terms of components, printed circuit boards and integrated circuits together form 11% of the product weight. The power supply and battery may also contribute significantly to total product mass, but the dataset doesn't report weight data for these components [9].

Sustainability Impact Categories

Climate Change Mitigation

This impact category addresses life cycle greenhouse gas emissions associated with the production, transport, use and end of life management of electronic products. The production phase impacts cover emissions from raw materials mining, product assembly and manufacturing.

Sustainable Use of Resources

This impact category identifies priority sustainability impacts with respect to material selection and use, product design, end-of-life management, water management and packaging for electronic products.

Chemicals of Concern

This impact category seeks to reduce the use of chemicals of concerns in products, packaging and manufacturing through effective management of the supply chain, chemical substance restrictions and alternatives assessment to prevent regrettable substitutions.

Responsible Supply Chains

Electronic product manufacturers leverage complex global supply chains for material sourcing and production of electronics, which often have negative labor, human rights, and environmental consequences. This impact category covers such social risks in the supply chain and promotes best practices for labor, and responsible sourcing of raw materials in the electronics sector.

GEC State of Sustainability Research has identified printed circuit boards and ICs as priority components, meaning these components are significant contributors to product climate impacts. Displays are also identified as a priority component in the GEC State of Sustainability Research. Based on the discussed datapoint on handheld POS material inventory, it is reasonable to assume that the same priority component list and related criteria are applicable to handheld POS devices as well.

With respect to material content, as previously noted, the particular POS device analyzed contains primarily plastics by mass; however, there could be other product designs where there may be more metals content in a given product. GEC is seeking input from stakeholders on these key aspects of product material composition to inform potential criteria development.

Material	Weight	Source
Power supply	1 unit per terminal (+/-80 g.)	Estimation (total terminal weight of 308 g., as retrieved from the model datasheet, minus the (estimated) weights of its components.
Lithium battery	1 unit per terminal (+/ 30 g.)	model Datasheet
Top case: PC (polycarbonate)	63.2 g.	Data from manufacturer 1.
Bottom case: PC (polycarbonate)	59.8 g.	Data from manufacturer 1.
Privacy shield 1: PC (polycarbonate)	5 g.	Data from manufacturer 1.
Privacy shield 2: Santoprene (assumed to mainly consist of polypropylene)	5 g.	Data from manufacturer 1.
Plastic frame: polyone (polyamide compound filled with 30 wt. % glass fiber)	4.15 g.	Data from manufacturer 1.
Contact plate: PC (polycarbonate)	0.55 g.	Data from manufacturer 1.
Holder: PC (polycarbonate)	3.51 g.	Data from manufacturer 1.
SAM door: PC (polycarbonate)	10.3 g.	Data from manufacturer 1.
Keypad: PC (polycarbonate)	9.7 g.	Data from manufacturer 1.
Keypad: Silicon	21.98 g.	Data from manufacturer 1.
Liquid crystal display (+/-5*5*0.3 cm.)	10 g.	Model Datasheet
Copper wire	10 g.	Estimation
Printed circuit boards	30 g.	Model Datasheet and 'weight calculation PCB'[7]
Samsung s3c2410al-20 (CPU, +/-10*10mm)	0.5 g.	Model teardown and 'product information S3C2410AL-20'[8]
Cy62177dv30II (SRAM, +/- 3*3mm)	0.03 g.	Model teardown and 'datasheet CY62167EV30' [9]
Mrd531b Triple Channel F2F Decoder IC (decoder, +/-5*5mm)	0.1 g.	Model teardown and estimation
8007b_c3 Double multiprotocol IC card interface (IC communication, 3*3mm)	0.03 g.	Model teardown and estimation
TDA8020HL Dual IC card interface (IC communication, 5*5mm)	0.774 g.	Model teardown and 'mouser electronics TDA'[10]
AX88772 USB2.0 Fast Ethernet Controller 10*10mm)	0.5 g.	Model teardown and 'mouser electronics TUSB'[11]
TUSB2046B 4 Port USB Hub (6*6mm)	0.174 g.	Model teardown and estimation
Verifone 08233-01-r (7*12mm)	0.5 g.	Model teardown and estimation
Paper roll	58 g.	Paper roll[12]

Table 3: Inventory of materials of a 'model' terminal as presented in DNB working paper 'Evaluating the environmental impact of debit card payments' [9].

GEC welcomes additional data on handheld POS device material composition from stakeholders, to enable more robust analysis and identification of key impact contributor components.

While GEC did not include sustainability analysis for Kiosk POS products, GEC also welcomes stakeholder input on Kiosk POS types, including but not limited to form factors, components and material composition, and applicability of the EPEAT 2.0 criteria.

4. Conclusions & Criteria Recommendations

As discussed in the preceding sections, many POS device types (AIOs, desktops, tablets) have form factors and hence material compositions similar if not identical to ICT products covered in the EPEAT computers and displays product category. Therefore, the sustainability impacts and mitigation strategies identified in previously published GEC State of Sustainability Research are directly applicable to these POS devices.

For the handheld POS device type, limited data analyzed to date indicates that the key materials and components in these products are similar to existing EPEAT computer and mobile phone products, but relative material content proportions may vary. For example, handheld POS devices contain the same priority components, including displays (LCD), power supplies, integrated circuits (ICs) and printed circuit boards (PCBs) identified in other EPEAT ICT products, but in different proportions. Similarly, POS devices may have a higher relative plastic to metal content ratio than a typical smartphone or tablet.

GEC proposes to create a new product category for POS devices. This POS product category will initially include the following product types: POS tablets, POS All-in-One (AIO) computers and POS desktop computers. Published GEC EPEAT 2.0 Criteria for Climate Change Mitigation, Sustainable Use of Resources, Chemicals of Concern and Responsible Supply Chains will be applied directly to these product types.

GEC welcomes stakeholder comments on all aspects of this Product Category Proposal, including the aforementioned approach of applying existing EPEAT 2.0 Criteria to select POS devices.

Following completion of the 60-day public consultation period, GEC will review all comments received and consider revisions to the document to reflect input shared. If GEC decides to pursue creation of a product category for POS devices, GEC will share a summary report of how comments were addressed with those who provided input. GEC will also post a revised final version of this document at https://globalelectronicscouncil.org/product-category-proposals/.

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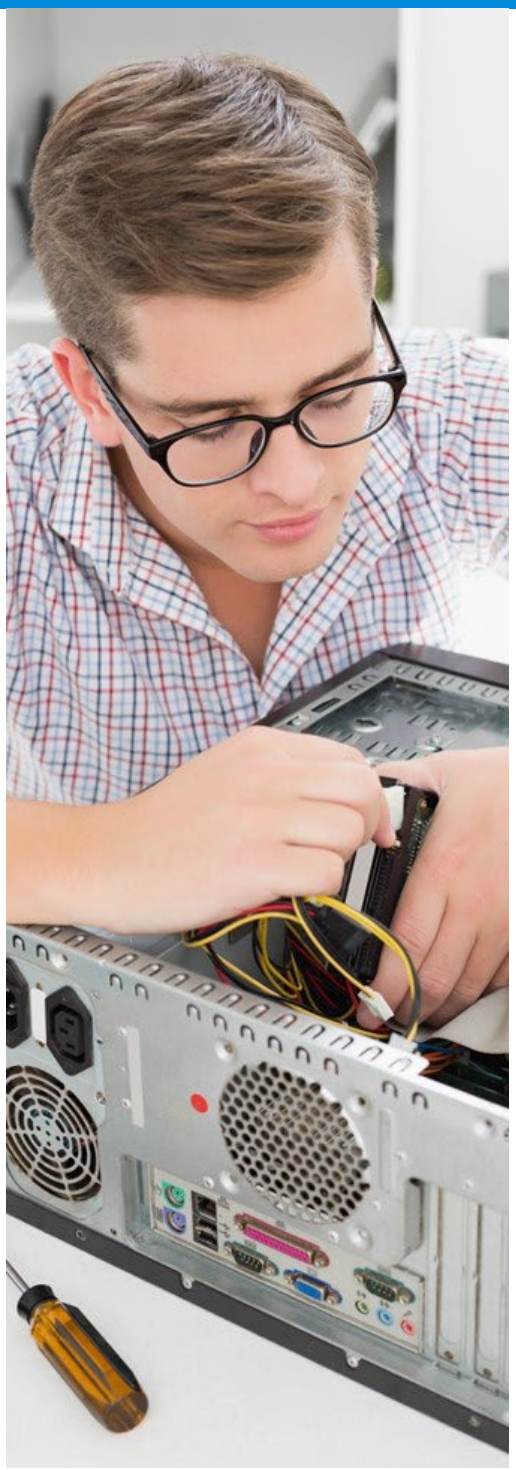
About the Global Electronics Council

The Global Electronics Council (GEC) accelerates systemic change to create a 100% sustainable electronics industry by 2050.

- This means net-zero emissions, zero waste, water neutrality and minimal adverse impact on the environment and human rights throughout the life cycle of products and services.
- As stewards of the EPEAT ecolabel, we set the global standard for sustainable electronics.
- We empower electronics manufacturers and buyers to meet their sustainability goals through our world-leading accreditation, advocacy and leadership.
- We are reshaping the world's relationship with technology and natural resources and enabling the transformation of electronics from an escalating environmental and social challenge into an empowering, sustainable solution.



Our EPEAT® Ecolabel

We are stewards of the EPEAT ecolabel – the definitive global standard to drive change across the technology sector from extraction to end of life. EPEAT enables manufacturers to follow strict third party verified standards while providing transparency for buyers.

Advancing Responsible Technology

Discover products on the EPEAT Registry and explore how they can contribute to your sustainability goals. Visit epeat.net to learn more.