

IntelliTAD #19: Four Things your Enterprise Clients Need from You

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A series of developments across vertical sectors that are critical to ITAD, such as healthcare, financial services, telecommunications and enterprise computing, points to changes in how organizations manage their technology assets. Corporate consolidation is reshaping service relationships, all while hardware costs are influencing replacement decisions, and new computing architectures are introducing equipment that requires specialized handling.

For the IT asset disposition (ITAD) and electronics recycling industries, these developments require us to reconsider some longstanding assumptions about where equipment recovery opportunities originate and how hardware retains value after its initial deployment.

Enterprise asset decisions are becoming more complex

One development worth watching is the growing role of specialized service providers in enterprise technology management. The proposed Brink's acquisition of NCR Atleos provides an example. The transaction would combine substantial ATM infrastructure operations, while the expansion of ATM-as-a-Service illustrates how financial institutions are relying on outside companies to manage equipment.

A similar development is visible in healthcare. Parkview Health's proposed acquisition of Ovation Healthcare involves a shared-services organization supporting more than 500 healthcare entities. Ovation already provides device lifecycle management and technology procurement services.

For ITAD providers, these arrangements raise an important commercial question: who has the authority to retire equipment and select recovery contractors? The answer increasingly requires understanding the relationships between enterprise asset owners and the organizations managing their technology.

Hardware replacement economics are shifting

The sharp increase in memory and storage costs is affecting both the PC and smartphone markets. Research firms reported declines of approximately 20% in global PC and smartphone shipments during the third quarter of 2026. Meanwhile, enterprises operating Windows 10 face a second year of Microsoft's Extended Security Updates program, with standard commercial pricing reaching 122 dollars per device.

These developments complicate replacement decisions. Higher hardware acquisition costs can encourage organizations to retain functioning equipment longer, even as software support becomes more expensive.

For ITAD providers, I see a potential consequence in the timing of equipment returns. Longer retention periods could delay incoming inventory, while demand for reliable refurbished hardware could support resale opportunities for selected models.

The outcome will depend on actual enterprise purchasing and replacement decisions. Lower new-device shipments do not automatically translate into higher refurbished sales.

AI infrastructure creates a different recovery challenge

NVIDIA's Blackwell rack-scale computing platforms illustrate another development with longer-term consequences. Systems such as the GB200 NVL72 combine 72 GPUs with 36 CPUs in integrated, liquid-cooled configurations. Their architecture presents a different equipment recovery proposition from conventional enterprise servers.

When these systems eventually enter secondary markets, recovery providers will need to assess whether complete racks can be redeployed economically. Individual compute assemblies could have value within compatible installations, depending on available buyers.

Specialized testing and technical familiarity could become important competitive capabilities. We still lack sufficient public transaction evidence to establish the resale economics of used Blackwell racks, so I would be cautious about assigning future values based on conventional server markets.

Retirement does not guarantee recovery

Two other developments illustrate the need to distinguish equipment retirement from physical material availability. U.S. telecommunications carriers are retiring legacy copper networks, but cables can remain installed after services are discontinued. Actual copper recovery depends on removal projects and the economics of extracting the material.

Federal cybersecurity requirements present a related issue. CISA has established deadlines for retiring unsupported network edge devices, including switches and routers. Those deadlines identify equipment that must leave covered operating environments, but federal property procedures determine its subsequent disposition.

Both developments offer legitimate subjects for commercial investigation. Neither provides sufficient evidence to forecast recycling volumes.

My outlook

I believe the hardware circularity industry is entering a period in which access to equipment and the ability to assess its remaining value will become increasingly important competitive considerations. Enterprise customers will continue making replacement decisions based on their operating requirements and technology budgets. Some will extend equipment life, while others will move toward newer infrastructure.

For ITAD executives, the business-development priority is to understand those decisions early enough to participate in the resulting equipment programs. For recyclers, the priority is securing reliable information about actual material releases. The opportunities are identifiable, but their commercial value must be established through real equipment flows and contracts. That is where I expect the next phase of enterprise hardware circularity to take shape.

In this issue, we look at some concrete developments in specific high-value verticals (HVV). In this context, HVV is defined as economic sectors and enterprises that provide the bulk of profitability in the ITAD sector.

Financial Sector-

Brink's-NCR Atleos Deal Raises Questions About Who Controls ATM Retirement - UK/U.S. Outlook

Brink's proposed \$6.6 billion acquisition of NCR Atleos is advancing through UK regulatory review, raising questions about control over ATM retirement, refurbishment and recycling. The analysis examines how growing ATM outsourcing could affect equipment recovery contracts, residual asset value and opportunities for ITAD providers, recyclers and enterprise asset managers. [Continue here.](#)

Healthcare-

Parkview-Ovation Acquisition Expands Rural Hospital Shared Services, With Implications for IT Asset Recovery - U.S. Outlook

Parkview Health's proposed acquisition of Ovation Healthcare expands its reach into shared services for more than 500 healthcare organizations, with a strong focus on rural hospitals. Ovation's technology management and purchasing services offer ITAD providers a potential route to coordinated equipment recovery, although dispersed facilities, smaller asset volumes and purchasing arrangements will determine the commercial viability. [Continue here.](#)

Handling Retired Clinical Equipment Requires Specialized ITAD and Refurbishment Controls - U.S. Outlook

Handling retired clinical equipment requires specialized procedures beyond conventional IT asset disposition. Using the Parkview-Ovation shared-services acquisition as context, this analysis examines FDA servicing and remanufacturing requirements, cybersecurity considerations, and equipment intake controls, with recommendations for ITAD providers, hospital asset managers and electronics recyclers. [Continue here.](#)

Technology & Data Centers-

Windows 10 Extended Updates Double to 122 Dollars as PC Prices Climb, Complicating Enterprise Refresh - U.S. Outlook

Microsoft's second-year Windows 10 security extension raises commercial licensing costs to \$122 per device, adding pressure to enterprise PC retention decisions. The analysis examines how rising support expenses may affect corporate refresh cycles, residual equipment values and opportunities for ITAD providers, refurbishers and downstream recyclers. [Continue here.](#)

Rack-Scale AI Hardware and the Economics of End-of-Life Recovery - NVIDIA Blackwell Analysis

NVIDIA's expansion into integrated, liquid-cooled AI computing systems introduces new challenges for server resale and refurbishment. With conventional server resale values near 2.5 times their seven-year average, this analysis examines how specialized GPU architectures could affect residual equipment values, component recovery and future recycling opportunities. [Continue here.](#)

Government & Public Sector-

CISA's Edge-Device Deadline Establishes a Federal Network Hardware Retirement Schedule - U.S. Outlook

CISA's Binding Operational Directive 26-02 requires federal civilian agencies to retire unsupported network edge devices by deadlines in 2027. The directive covers routers, firewalls, switches and other network equipment, creating potential opportunities for secure decommissioning services. Actual ITAD and recycling volumes will depend on agency inventories, federal property disposal rules and authorized equipment releases. [Continue here.](#)

Telecommunications:

Smartphone Shipments Fall 20%, Creating Tension Between Refurbished Demand and Trade-In Supply - Global Outlook

Global smartphone shipments fell 20% in the third quarter of 2026 as rising memory costs pressured manufacturers and consumers delayed upgrades. The analysis examines the

implications for refurbished-device demand, trade-in supply, secondary-market pricing and the availability of retired mobile equipment for ITAD providers and electronics recyclers.

[Continue here.](#)

U.S. Copper Network Retirement Accelerates, With Physical Recovery Volumes Still Uncertain - US

AT&T's copper shutdown timetable and continuing CenturyLink retirement notices point to a substantial U.S. telecommunications infrastructure transition. The analysis examines why network closures cannot be converted directly into copper recycling volumes, and where equipment recovery companies, metals recyclers and infrastructure contractors may find commercial opportunities. [Continue here.](#)

Manufacturing & Industrial Brief:

Machinery Orders Rise 36.3% as Automation Drives Higher Equipment Spending - U.S.

U.S. metalworking machinery orders reached 732.9 million dollars in August 2026, up 36.3% year over year, driven partly by investment in higher-value automated equipment. This Manufacturing & Industrial Brief examines why rising machinery spending does not necessarily translate into increased used-equipment supply or scrap metal volumes.

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