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Conviction or compliance, what's really driving sustainability efforts?

Highlights from **VotE: Data Centers**

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Introduction

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This year's research reveals a striking shift in how data center leaders are answering that question. The data suggests that sustainability, once positioned as a competitive differentiator and moral imperative, is increasingly being weighed against more immediate operational and financial priorities — particularly as AI infrastructure demands reshape resource allocation and strategic focus. These and other trends are highlighted in our Voice of the Enterprise: Data Centers, Sustainability 2026 survey.

THE TAKE

The data center industry seems to be finding itself in a weird spot. The headlines are full of notable negative public sentiment toward new data center developments. This year alone, we have published no fewer than four reports on proposed and recently passed legislation concerning data centers across the US — most of which seek to slow or completely halt new data center builds. We have also noted a shift in public sentiment, with more than half of the data center projects identified as paused or abandoned due to negative sentiment, not power-related issues (though to be clear, those issues are not going away either). With that in mind, it seems like a weird time to back away from sustainability goals, given that many public charges against the industry are environmentally related.

A silver lining here is that one key group — the hyperscalers — has not backed down from sustainability efforts and, in fact, has recently brought on more clean and renewable energy than in years past. So, while the enterprise segment may be shifting, the companies that are actually driving the largest demand on our power grids appear to be holding strong.

Summary of findings

There is a big drop in the importance of data center sustainability. Since 2022, we have been asking companies how important the efficiency and sustainability of their data centers are to the organization. A common critique, however, is that it is possible for an organization to care about efficiency while not being terribly concerned with sustainability, as efficiency ultimately affects the bottom line more directly. For this year's survey, we decided to untangle the two, posing each in its own question, and the results were quite interesting. Less than half of organizations (47%) view the sustainability of their data centers as very important. Compared to our 2025 survey, which asked about efficiency and sustainability together, 60% of companies noted it as being very important. To account for changing overall sentiment, even if we add together the "very important" and "somewhat important" responses, just shy of 72% find the sustainability of their data centers to be important by some measure, compared to our 2025 study, which showed 83%. Elsewhere in the survey, however, we also asked about the role of sustainability when choosing a cloud vendor — a question we have asked the same way for years — and found a similar change in sentiment toward sustainability. About 44% of organizations say sustainability is a deciding or influential factor in the cloud vendor selection process, which is down compared to 2025 (50%). The takeaway is that, yes, companies hold efficiency and sustainability separately, and sentiment toward the latter seems to be waning.

Efficiency is more important than sustainability. When asked how they weigh sustainability against efficiency, more than half of organizations (54%) say efficiency is more important for their data centers. Only 5% say sustainability is more important, while 40% say they are equal. AI is also having a direct impact on sustainability, as 25% of organizations say they have shifted their budgets from sustainability to AI initiatives. Another 44% say they have not yet done so, but that it seems likely in the future.

Softening US sustainability policies play a role. Changes in the US administration's policy stance toward sustainability are playing a key role in how organizations view their sustainability efforts, with 53% of organizations agreeing that changes in US policies toward sustainability directly impact their posture toward sustainability. Interestingly, there is a dip in the number of organizations with formal or informal sustainability goals compared to 2025 (from 71% down to 66%), but only 14% say they have no plans to set sustainability goals (up 3 percentage points compared to 2025). But there is a significant drop in the number of respondents who think their organizations will actually achieve their sustainability goals (from 54% to 39% reporting very likely). The changes in US policy and subsequent organizational changes put more of a spotlight on the conviction versus compliance debate. Are organizations participating in sustainability efforts out of shared convictions that it is the right thing to do, or are they simply playing along to comply with statutory or public relations obligations?

Availability of sustainable energy sources is less of a factor in site selection. In our 2025 survey, 69% of organizations said the availability of sustainable energy sources was a deciding or influential factor in their data center site selection process. That number has dropped to 58% in the current survey. Also, fewer organizations are using unbundled renewable energy certificates (RECs) to offset their energy usage compared to 2025 (65%; down 8 points). While it is possible that more organizations are using energy directly from sustainable sources, it is also very likely this is another example of organizations worrying less about offsetting their nonrenewable energy usage.

Hyperscalers have a different perspective. According to our 2026 corporate carbon-free energy analysis, hyperscalers appear to be actually expanding their search for sustainable energy sources. This stands in contrast to enterprise sentiment toward sustainability practices. Hyperscalers are in a race to secure as many power sources as possible, especially as AI and electrification are projected to exponentially increase power demand. The potential for continued disruptions to the global energy system, especially in oil markets, is also a major factor. To that end, hyperscale use of renewable energy sources could be viewed in the future as having as much to do with energy autonomy as going green — however you position it, the environmental benefits are the same.

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