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Data Center Infrastructure Management (DCIM) Software Market - A Global and Regional Analysis: Focus on Product, Application, and Country Analysis - Analysis and Forecast, 2026-2036

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Abstracts

The data center infrastructure management (DCIM) software market is projected to grow from $1,890.06 million in 2025 to $9,760.46 million by 2036, at a CAGR of 16.07%. The growth is driven by the rapid expansion of data center infrastructure, increasing adoption of cloud computing and artificial intelligence workloads, and the growing need for real-time monitoring and optimization of power, cooling, and asset performance across complex environments. The integration of advanced technologies such as artificial intelligence, machine learning, and IoT-enabled sensors is further enhancing the capabilities of DCIM platforms, enabling predictive maintenance and data-driven decision-making.

Rising investments in hyperscale and colocation data centers, along with enterprise digital transformation initiatives, are significantly boosting the adoption of DCIM solutions, particularly in regions with strong digital infrastructure development. Enterprise and colocation data centers represent major application segments, supported by increasing requirements for operational efficiency, uptime reliability, and regulatory compliance. At the same time, the shift toward hybrid and distributed IT architectures is driving demand for scalable and cloud-integrated DCIM platforms.

However, the market faces challenges such as high initial implementation costs, integration complexities with legacy infrastructure, and concerns related to data security and privacy. Despite these constraints, the competitive landscape remains dynamic, with established infrastructure providers and software vendors continuously enhancing their offerings through innovation, strategic partnerships, and cloud-based deployment

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models. As data center operations become more complex and energy-intensive, the DCIM software market is expected to witness sustained growth, supported by the need for efficient, resilient, and sustainable infrastructure management solutions.

Introduction of the Data Center Infrastructure Management (DCIM) Software Market

The study conducted by BIS Research identifies the data center infrastructure management (DCIM) software market as a critical enabler of modern digital infrastructure operations. DCIM platforms are evolving into integrated operational control systems capable of delivering real-time visibility, predictive insights, and centralized management of data center physical and virtual assets, including power, cooling, space, and IT infrastructure. These solutions are increasingly essential in supporting mission-critical data center environments, particularly as organizations scale digital services, cloud deployments, and artificial intelligence workloads across geographically distributed facilities.

With advancements in artificial intelligence, machine learning, and Internet of Things (IoT)-enabled monitoring, DCIM platforms are becoming more intelligent, automated, and capable of optimizing infrastructure performance in real time. The integration of digital twin technologies, predictive analytics, and energy management capabilities is enabling operators to enhance capacity planning, reduce downtime risks, and improve energy efficiency. Additionally, the growing complexity of hybrid IT architectures and the expansion of hyperscale and edge data centers are driving the need for scalable and interoperable DCIM solutions that can support diverse operational requirements.

As data center strategies shift toward automation-driven and sustainability-focused operations, DCIM platforms provide a competitive advantage by enabling standardized workflows, improved resource utilization, and compliance with regulatory and environmental standards. The market is expected to witness strong growth in the coming years, supported by increasing investments in digital infrastructure, rising energy efficiency mandates, and continuous technological innovation.

Market Introduction

The data center infrastructure management (DCIM) software market is becoming a foundational component of modern data center and digital infrastructure ecosystems, driven by the growing demand for real-time operational visibility, data-driven decision-making, and efficient resource management. As data center environments become increasingly complex due to the proliferation of cloud computing, edge deployments,

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and high-density computing workloads, DCIM platforms provide essential capabilities for monitoring, controlling, and optimizing infrastructure performance across distributed facilities. Rapid advancements in analytics, automation, and sensor technologies are enhancing the functionality of DCIM solutions, enabling more accurate capacity forecasting, predictive maintenance, and energy optimization. The integration of cloud-based architectures, advanced communication systems, and edge monitoring capabilities is further expanding the operational scope of DCIM platforms, allowing operators to manage multi-site environments with greater efficiency and consistency. Amid rising energy costs, sustainability targets, and regulatory requirements, organizations are accelerating investments in DCIM solutions to improve energy efficiency, reduce operational risks, and ensure compliance with environmental standards. The market also benefits from its applicability across multiple industries, including IT and telecom, BFSI, government, healthcare, and manufacturing, where uptime, reliability, and cost optimization are critical. With continuous innovation and increasing adoption across both enterprise and hyperscale environments, DCIM software is set to play a vital role in the future of data center operations and digital infrastructure management.

Industrial Impact

The data center infrastructure management (DCIM) software market is exerting a significant industrial impact, reshaping the data center, IT infrastructure, and digital services sectors through advancements in real-time monitoring, automation, and data-driven operational intelligence. DCIM platforms enable comprehensive visibility into power, cooling, and IT assets, allowing operators to optimize performance, reduce downtime risks, and enhance overall operational efficiency across enterprise, colocation, and hyperscale data center environments.

The integration of advanced analytics, artificial intelligence, and IoT-enabled sensors is driving demand for more intelligent, scalable, and interoperable DCIM solutions. These advancements are improving capacity planning, enabling predictive maintenance, and supporting energy optimization initiatives, particularly in high-density and geographically distributed data center facilities. Additionally, the increasing deployment of DCIM platforms across edge data centers and hybrid IT environments is fostering closer collaboration between infrastructure providers, cloud service providers, and technology vendors.

As organizations prioritize digital transformation, sustainability, and operational resilience, the DCIM software market is expected to play a critical role in enabling

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efficient and data-driven infrastructure management. The surrounding industrial ecosystem is also evolving rapidly, supported by strong investments in data center expansion, increasing regulatory focus on energy efficiency, and continuous innovation in software capabilities, reinforcing DCIM's position as a foundational component of modern digital infrastructure operations.

Market Segmentation:

Segmentation 1: by Deployment Model

On-Premises Deployment

Cloud-Based Deployment (SaaS)

Hybrid Deployment

On-Premises Deployment to Maintain Dominance in the Data Center Infrastructure Management (DCIM) Software Market (by Deployment Model)

In the data center infrastructure management (DCIM) software market, the on-premises deployment segment is projected to dominate, growing from $1,021.49 million in 2025 to $4,284.63 million by 2036, at a CAGR of 13.88%, driven by the continued preference of large enterprises and hyperscale operators for enhanced control, security, and integration with existing infrastructure systems. These deployments are particularly critical in industries with strict compliance and data sovereignty requirements, where real-time control and system reliability are essential. Meanwhile, the cloud-based deployment (SaaS) segment is expected to be the fastest-growing, with a CAGR of 18.75%, increasing from $621.33 million in 2025 to $4,129.81 million by 2036, supported by rising demand for scalable, cost-efficient, and remotely accessible infrastructure management solutions across distributed and multi-site data center environments. The hybrid deployment segment is also witnessing strong growth, expanding at a CAGR of 16.61% from $247.25 million in 2025 to $1,346.02 million by 2036, as organizations increasingly adopt flexible models that combine on-premises control with cloud-based analytics and monitoring capabilities. Together, these deployment models are shaping the evolution of the DCIM software market, reflecting a transition toward more scalable, integrated, and digitally enabled infrastructure management approaches.

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Segmentation 2: by Solution Type

- Asset & Inventory Management
- Capacity Planning & Modeling
- Power Management
- Cooling & Thermal Management
- Environmental Monitoring
- Others

Capacity Planning and Modeling to Maintain Dominance in the Data Center Infrastructure Management (DCIM) Software Market (by Solution Type)

In the data center infrastructure management (DCIM) software market, the capacity planning and modeling segment is projected to dominate, growing from $387.93 million in 2025 to $2,297.78 million by 2036, at a CAGR of 17.50%, driven by the increasing need for predictive analytics, efficient resource allocation, and long-term infrastructure optimization across rapidly expanding data center environments. As operators manage higher rack densities and dynamic workloads, capacity planning solutions are becoming critical for minimizing downtime risks and ensuring optimal utilization of power, space, and cooling resources. Meanwhile, the cooling and thermal management segment is expected to be the fastest-growing, with a CAGR of 18.98%, increasing from $224.02 million in 2025 to $1,521.23 million by 2036, supported by rising energy consumption, sustainability mandates, and the need to manage heat dissipation in high-density and hyperscale data centers. Additionally, power management is witnessing strong growth at a CAGR of 16.25%, reaching $1,307.23 million by 2036 from $248.25 million in 2025, as operators focus on energy efficiency and power usage effectiveness (PUE) optimization. The environmental monitoring segment is also expanding steadily, growing at a CAGR of 17.07%, driven by the need for real-time monitoring of temperature, humidity, and other environmental parameters to ensure operational stability. Furthermore, asset and inventory management, valued at $468.10 million in 2025 and projected to reach $1,923.71 million by 2036, continues to play a foundational role in tracking and managing data center assets, while the others segment contributes to overall market expansion through specialized and integrated functionalities. Together,

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these solution types are shaping the evolution of the DCIM software market, reflecting a shift toward more predictive, energy-efficient, and intelligence-driven infrastructure management systems.

Segmentation 3: by Data Center Type

- Hyperscale Data Center
- Enterprise Data Center
- Colocation Data Center
- Others

Enterprise Data Center to Maintain Dominance in the Data Center Infrastructure Management (DCIM) Software Market (by Data Center Type)

In the data center infrastructure management (DCIM) software market, the enterprise data center segment is projected to dominate, growing from $799.88 million in 2025 to $3,386.00 million by 2036, at a CAGR of 13.97%, driven by the widespread presence of enterprise-owned facilities and the ongoing modernization of legacy infrastructure to support hybrid IT environments. These facilities require robust DCIM solutions for real-time monitoring, asset tracking, and integration with existing IT and facility management systems to ensure operational efficiency and uptime reliability. Meanwhile, the hyperscale data center segment is expected to be the fastest-growing, with a CAGR of 18.08%, increasing from $278.39 million in 2025 to $1,726.38 million by 2036, supported by large-scale investments from cloud service providers and the expansion of high-density computing environments requiring advanced automation and predictive analytics capabilities. The colocation data center segment is also witnessing strong growth, expanding at a CAGR of 17.16%, reaching $4,547.80 million by 2036 from $792.92 million in 2025, driven by rising demand for third-party data center services, multi-tenant infrastructure management, and SLA-based performance optimization. Additionally, the others segment continues to contribute steadily to market expansion, growing at a CAGR of 16.35%, reflecting niche and emerging data center deployments. Together, these segments are shaping the evolution of the DCIM software market, highlighting a shift toward scalable, high-performance, and efficiently managed data center infrastructures.

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Segmentation 4: by End-Use Industry

- IT and Telecom
- Banking, Financial Services, and Insurance (BFSI)
- Government and Public Sector
- Healthcare
- Manufacturing
- Retail
- Others

IT and Telecom to Maintain Dominance in the Data Center Infrastructure Management (DCIM) Software Market (by End-Use Industry)

In the data center infrastructure management (DCIM) software market, the IT and telecom segment is projected to dominate, growing from $1,033.66 million in 2025 to $4,606.29 million by 2036, at a CAGR of 14.59%, driven by the rapid expansion of cloud computing, increasing data traffic, and continuous investments in hyperscale and edge data center infrastructure. The sector requires advanced DCIM solutions to ensure real-time monitoring, efficient resource utilization, and uninterrupted service delivery across highly dynamic and distributed environments. Meanwhile, the BFSI segment is expected to be the fastest-growing, with a CAGR of 18.40%, increasing from $497.50 million in 2025 to $3,225.18 million by 2036, supported by rising demand for secure, compliant, and highly reliable data center operations to manage sensitive financial data and digital banking services. The healthcare segment is also witnessing strong growth, expanding at a CAGR of 17.64%, reaching $278.41 million by 2036 from $46.09 million in 2025, driven by increasing adoption of digital health systems, electronic medical records, and data-intensive applications. Additionally, retail and manufacturing segments are growing steadily at CAGRs of 17.05% and 16.22%, respectively, supported by digital transformation initiatives and the need for efficient infrastructure management. The government and public sector segment continues to expand at a CAGR of 15.96%, driven by investments in secure and sovereign data infrastructure, while the others segment contributes steadily to market growth. Together, these end-use industries are

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shaping the evolution of the DCIM software market, reflecting increasing reliance on scalable, secure, and data-driven infrastructure management solutions across sectors.

Segmentation 5: by Region

North America: U.S., Canada, and Mexico

Europe: Germany, France, Netherlands, U.K., Italy, Spain, and Rest-of-Europe

Asia-Pacific: China, Japan, South Korea, India, Australia, and Rest-of-Asia-Pacific

Rest-of-the-World: South America, the Middle East, and Africa

North America to Maintain Dominance in the Data Center Infrastructure Management (DCIM) Software Market (by Region)

In the data center infrastructure management (DCIM) software market, North America is projected to maintain its dominant position, growing from $918.68 million in 2025 to $4,960.87 million by 2036, at a CAGR of 16.52%, driven by the strong presence of hyperscale data center operators, advanced digital infrastructure, and continuous investments in cloud computing and artificial intelligence workloads across the U.S., Canada, and Mexico. Meanwhile, the Asia-Pacific region is expected to be the fastest-growing, with a CAGR of 17.78%, increasing from $511.83 million in 2025 to $3,108.01 million by 2036, supported by rapid data center expansion and digitalization across China, India, Japan, and South Korea. The Europe region is witnessing steady growth, expanding at a CAGR of 12.51%, reaching $1,559.99 million by 2036 from $425.83 million in 2025, driven by strong regulatory focus on energy efficiency and sustainability across major economies such as Germany, France, and the U.K. Additionally, the rest-of-the-world segment is growing at a CAGR of 13.12%, supported by increasing investments in digital infrastructure across Latin America, the Middle East, and Africa. Together, these regions are shaping the global DCIM software market, reflecting varying levels of maturity, investment intensity, and adoption across geographies.

Demand: Drivers, Limitations, and Opportunities

Market Demand Drivers: Expansion of Hyperscale Infrastructure and Energy Optimization Needs

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The data center infrastructure management (DCIM) software market has been experiencing strong demand growth, driven by a convergence of technological advancements, rapid digital transformation, and the increasing complexity of modern data center environments. One of the primary drivers is the expansion of hyperscale data centers and cloud infrastructure, where operators are required to manage large-scale, distributed facilities with high rack densities and dynamic workloads. The rise of artificial intelligence (AI), machine learning, and high-performance computing is significantly increasing power consumption and thermal output, creating a critical need for advanced DCIM solutions that enable real-time monitoring, capacity planning, and energy optimization. These solutions allow operators to track key performance indicators such as power usage effectiveness, cooling efficiency, and asset utilization, thereby improving operational efficiency and reducing costs. Additionally, large-scale investments by hyperscale providers such as Amazon Web Services, Microsoft Azure, and Google Cloud are accelerating the adoption of DCIM platforms to support scalable and automated infrastructure management. Regulatory frameworks and government initiatives focused on sustainability and carbon reduction are further reinforcing demand, as data center operators are increasingly required to comply with energy efficiency standards and environmental regulations. Moreover, the growing adoption of edge computing and distributed data center architectures is expanding the need for centralized monitoring and control across geographically dispersed facilities. As organizations continue to prioritize uptime, performance, and cost optimization, the demand for intelligent, integrated DCIM solutions is expected to remain strong across global markets.

Market Challenges: Integration Complexity, Skill Gaps, and Infrastructure Constraints

The data center infrastructure management (DCIM) software market faces a series of structural and operational challenges that could impact its long-term scalability and adoption. A key challenge is the integration of DCIM platforms with legacy infrastructure, as many organizations continue to operate fragmented systems that lack standardization and interoperability. This makes implementation complex, time-consuming, and resource-intensive, particularly in large enterprise environments with heterogeneous IT and facility management systems. Compounding this issue is the shortage of skilled professionals capable of deploying, managing, and analyzing DCIM platforms, especially those incorporating advanced analytics, artificial intelligence, and automation capabilities. Cybersecurity risks are also becoming increasingly significant, as the convergence of IT and operational technology exposes data center infrastructure to potential cyber threats, including unauthorized access, data breaches, and system

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disruptions. From an infrastructure perspective, aging power grids, rising energy costs, and increasing power density requirements are placing additional pressure on data center operators, making efficient resource management more challenging. Furthermore, the lack of standardized protocols and data formats across different DCIM vendors can hinder seamless integration and limit the effectiveness of real-time decision-making. Economic factors, including high initial deployment costs and ongoing maintenance requirements, may also act as barriers for small and medium-sized enterprises. Together, these challenges highlight the need for improved interoperability standards, workforce development, and robust cybersecurity frameworks to fully unlock the potential of DCIM solutions.

Market Opportunities: AI-Driven Optimization and Sustainable Data Center Operations

The growing emphasis on sustainability, automation, and intelligent infrastructure management presents significant opportunities for the DCIM software market. As data centers become more energy-intensive due to the proliferation of AI workloads, cloud computing, and digital services, operators are increasingly prioritizing solutions that can optimize power consumption, improve cooling efficiency, and support environmental, social, and governance (ESG) objectives. The integration of advanced technologies such as artificial intelligence, machine learning, and Internet of Things (IoT) sensors is enabling next-generation DCIM platforms to deliver predictive analytics, automated decision-making, and real-time optimization capabilities. These innovations allow operators to anticipate equipment failures, dynamically adjust cooling and power distribution, and enhance overall operational resilience. Additionally, the expansion of edge computing and distributed data center networks is creating new opportunities for cloud-based and hybrid DCIM solutions that can provide centralized visibility across multiple locations. Emerging markets, particularly in Asia-Pacific and the Middle East, are also witnessing increased investments in digital infrastructure, offering significant growth potential for DCIM vendors as new data centers are built with integrated management systems from the outset. Furthermore, the increasing adoption of modular and scalable data center designs is driving demand for flexible DCIM solutions that can adapt to evolving operational requirements. As sustainability targets become more stringent and operational efficiency becomes a key competitive differentiator, DCIM platforms are expected to play a critical role in enabling intelligent, energy-efficient, and future-ready data center ecosystems.

How can this report add value to an organization?

Product/Innovation Strategy: This report provides in-depth insight into evolving data

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center infrastructure management (DCIM) technologies and solutions, helping organizations align their product strategies with emerging market requirements. It explores innovations such as AI-driven analytics, digital twins, IoT-enabled monitoring, and cloud-based DCIM platforms for real-time infrastructure optimization. These advancements are transforming data center operations by improving energy efficiency, enhancing asset visibility, reducing downtime risks, and enabling predictive maintenance. The report highlights how integrated DCIM solutions, combining power, cooling, and IT infrastructure management, can deliver scalability and operational efficiency across hyperscale, colocation, and enterprise environments. By identifying key innovation trends, vendor capabilities, and technology benchmarks, the report supports R&D planning, solution development, and long-term digital infrastructure strategy formulation.

Growth/Marketing Strategy: The data center infrastructure management (DCIM) software market presents significant growth opportunities for both established technology providers and emerging players. Key strategies being pursued include mergers and acquisitions, strategic partnerships, platform integration, and geographic expansion to address the growing demand for intelligent infrastructure management solutions. Companies are increasingly investing in artificial intelligence, automation, and cloud-based delivery models to enhance platform capabilities and support distributed and high-density data center environments. The rising demand for hyperscale data centers, edge computing, and sustainable infrastructure is accelerating innovation and deployment of DCIM solutions across global markets. Additionally, vendors are focusing on vertical-specific solutions and managed services to strengthen customer engagement and expand their market footprint.

Competitive Strategy: The report profiles leading companies in the DCIM software market, including infrastructure solution providers, software vendors, and system integrators. A comprehensive competitive landscape is provided, highlighting strategic collaborations, technology partnerships, product innovations, and expansion initiatives. This analysis enables stakeholders to identify high-growth segments and refine their market positioning through differentiated offerings, integrated solutions, and customer-centric strategies. As DCIM solutions become increasingly critical to modern data center operations, competition is expected to intensify around technological innovation, scalability, energy optimization capabilities, and the ability to support complex, multi-site infrastructure environments.

Research Methodology

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Factors for Data Prediction and Modelling

The base currency considered for the data center infrastructure management (DCIM) software market analysis is US$. Currencies other than the US$ have been converted to the US$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2021 to March 2024 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the data center infrastructure management (DCIM) software market .

The market engineering process involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the

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market.

Primary Research

The primary sources involve industry experts from the data center infrastructure management (DCIM) software market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

validation and triangulation of all the numbers and graphs

validation of reports, segmentation, and key qualitative findings

understanding the competitive landscape

validation of the numbers of various markets for the market type

percentage split of individual markets for geographical analysis

Secondary Research

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as the Census Bureau, OICA, and ACEA.

Secondary research was done to obtain crucial information about the industry’s value chain, revenue models, the market’s monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

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segmentations and percentage shares

data for market value

key industry trends of the top players in the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies profiled in the data center infrastructure management (DCIM) software market have been selected based on inputs gathered from primary experts, who have evaluated company coverage, product portfolio, and market penetration across key data center environments. The assessment framework focuses on identifying organizations with strong capabilities in infrastructure monitoring, asset and capacity management, and energy optimization, along with their ability to support enterprise, colocation, and hyperscale data center operations.

The competitive landscape comprises a mix of established infrastructure solution providers and specialized DCIM software vendors that are actively enhancing their offerings to address the increasing complexity of modern data centers. These companies are distinguished by their ability to deliver scalable platforms, integrate advanced analytics, and enable real-time operational visibility. Additionally, continuous investments in research and development, along with strategic collaborations and deployment across large-scale data center facilities, have been considered key factors in determining their inclusion and positioning within the DCIM market.

Some of the prominent names in the data center infrastructure management (DCIM) software market are:

Schneider Electric

Vertiv Group Corp

International Business Machines Corporation (IBM)

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Cisco Systems, Inc.

Hewlett Packard Enterprise Development LP

ABB Ltd.

Huawei Technologies Co., Ltd.

Eaton Corporation plc

Siemens AG

Johnson Controls International plc

Companies that are not part of the aforementioned pool have been well represented across different sections of the data center infrastructure management (DCIM) software market report (wherever applicable).

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List Of Figures

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Figure 61: Assumptions and Limitations

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List Of Tables

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