

Global AI Data Center Operations and Maintenance Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Data Center Operations and Maintenance Services market size is expected to reach \$ 8510 million by 2032, rising at a market growth of 12.5% CAGR during the forecast period (2026-2032).

AI Data Center Operations and Maintenance Services refer to recurring professional services provided for data centers, intelligent computing centers and graphics processing unit clusters that support artificial intelligence training, inference and high performance computing workloads. The research scope covers both critical facility infrastructure and information technology infrastructure. Critical facility assets include utility power connections, power distribution systems, uninterruptible power supplies, backup generation, precision air cooling, direct liquid cooling, immersion cooling, fire protection, environmental monitoring, building management systems, energy management systems and data center infrastructure management platforms. Information technology assets include graphics processing unit servers, general purpose servers, storage systems, high speed switching networks, InfiniBand and Ethernet based remote direct memory access fabrics, operating systems, container platforms, cluster schedulers, resource management platforms and observability tools.

The principal service forms include dedicated onsite operations, centralized remote managed operations, hybrid onsite and remote support, maintenance of individual infrastructure systems, integrated multisystem maintenance and fully managed site operations. Service delivery commonly begins with asset discovery, configuration verification, operating baseline establishment and risk assessment. It then proceeds through continuous telemetry collection, alarm correlation, ticket generation, incident classification, routine inspection, preventive maintenance, condition based

maintenance, fault diagnosis, change control, emergency recovery, root cause analysis and continuous performance optimization. Providers increasingly use infrastructure management platforms, building control systems, automated runbooks, digital twins, artificial intelligence operations tools and predictive maintenance models to coordinate physical facilities with computing workloads.

Important service specifications include contracted system availability, incident response time, mean time to repair, preventive maintenance completion, graphics processing unit node availability, cluster job success rate, storage performance, network latency, packet loss, rack power density, power usage effectiveness and liquid cooling temperature, pressure, flow and leakage indicators. High availability contracts commonly target service availability ranging from 99.9 percent to 99.999 percent, while severe incidents may require initial response within fifteen to thirty minutes. Contract performance may also be linked to energy efficiency, spare parts availability, change success, capacity utilization, security compliance and recovery readiness.

The primary function of these services is to maintain safe, stable, continuous and efficient operation of artificial intelligence computing infrastructure. They help customers improve accelerator utilization, shorten workload delivery time, reduce unplanned outages, control energy and cooling costs and extend the useful life of expensive computing assets. Major applications include hyperscale artificial intelligence data centers, private enterprise artificial intelligence facilities, public intelligent computing centers, scientific high performance computing centers, financial computing platforms, telecommunications computing centers, sovereign artificial intelligence infrastructure and colocation facilities designed for high density computing.

AI data center operations and maintenance services have evolved from conventional equipment maintenance into an integrated discipline that coordinates critical facilities, computing hardware, high speed networks, software platforms and artificial intelligence workload resources. The upstream segment of the value chain supplies graphics processing unit servers, storage systems, switching equipment, power distribution assets, uninterruptible power supplies, backup generation, direct liquid cooling equipment, immersion cooling systems, sensors, spare parts and monitoring software. These products establish the physical and digital foundation required for reliable operations. The midstream segment consists of managed infrastructure providers, critical facility operators, original equipment service organizations, regional field service companies and data center operators. Their responsibilities increasingly extend beyond inspection and repair to capacity management, workload monitoring, energy optimization, predictive maintenance, security compliance and lifecycle planning. The

downstream segment includes cloud platforms, internet companies, financial institutions, telecommunications operators, manufacturers, research organizations, public authorities and artificial intelligence application developers. Procurement is shifting from isolated maintenance agreements toward multisystem contracts governed by availability, response time and recovery commitments. High value projects require operational teams to understand both electrical and mechanical infrastructure and the behavior of graphics processing unit clusters. Competitive advantage is therefore moving away from labor scale alone and toward engineering experience, automation platforms, spare parts coverage, standardized procedures, security controls and demonstrated reliability in mission critical environments.

Regional competition combines global operating platforms with strong local delivery requirements. North America has a mature outsourcing ecosystem and a high concentration of artificial intelligence infrastructure investment, creating demand for automated operations, cyber resilience, business continuity and heterogeneous cluster management. European demand is increasingly shaped by energy efficiency, water management, emissions disclosure and data sovereignty, leading customers to place greater emphasis on auditable energy metrics, renewable energy coordination and sustainable cooling practices. China is supported by the expansion of public intelligent computing centers, telecommunications computing networks and enterprise artificial intelligence adoption. Service contracts in this market frequently combine infrastructure delivery, onsite staffing, computing resource scheduling and local spare parts support. India remains an important source of remote infrastructure management expertise and skilled technical personnel. Southeast Asia and the Middle East are developing rapidly as new hyperscale and sovereign artificial intelligence facilities enter operation, increasing demand for internationally standardized operating processes, liquid cooling expertise and local workforce development. Capacity deployment is gradually shifting toward regions with available electricity, suitable land, renewable energy resources and strong network connectivity. However, incident response, physical security and regulatory compliance must usually remain local, encouraging providers to combine centralized monitoring platforms with regional engineering teams and onsite service networks.

Policy requirements are pushing AI data center operations toward greater standardization, energy efficiency and transparency. China is promoting unified orchestration of heterogeneous computing resources, intelligent operations, energy management and coordinated national computing networks. Several regional programs are also encouraging full lifecycle services, liquid cooled server repair and diagnostics for critical computing components. European rules are strengthening energy

performance reporting and sustainability assessment for larger data centers, requiring operators to collect consistent information on electricity use, water use, cooling efficiency and equipment utilization. In the United States and other major markets, the rapid growth of artificial intelligence facilities is increasing regulatory and commercial attention to grid capacity, energy security, backup generation, load flexibility and long term operating efficiency. Industry demand should continue to expand, although service revenue will not rise at the same pace as graphics processing unit purchases or total data center capital expenditure. Large cloud platforms and some telecommunications operators will retain internal operating teams, while automation will reduce demand for repetitive manual tasks. The strongest source of third party growth will come from private enterprise artificial intelligence facilities, public computing platforms, liquid cooling retrofits and distributed computing infrastructure. Providers with full stack operating capability, energy optimization expertise, strong security processes and a proven ability to deliver across multiple regions will be best positioned to secure long duration service contracts.

Report Scope

This report studies the global AI Data Center Operations and Maintenance Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for AI Data Center Operations and Maintenance Services, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AI Data Center Operations and Maintenance Services that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AI Data Center Operations and Maintenance Services total market, 2021-2032, (USD Million)

Global AI Data Center Operations and Maintenance Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: AI Data Center Operations and Maintenance Services total market, key domestic companies, and share, (USD Million)

Global AI Data Center Operations and Maintenance Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global AI Data Center Operations and Maintenance Services total market by Type,

CAGR, 2021-2032, (USD Million)

Global AI Data Center Operations and Maintenance Services total market by
Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global AI Data Center Operations and Maintenance Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Infosys Limited, Tech Mahindra Limited, Rackspace Technology, Inc., DXC Technology Company, T-Systems International GmbH, Orange Business, Computacenter plc, NEC Corporation, Cognizant Technology Solutions Corporation, Unisys Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world AI Data Center Operations and Maintenance Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AI Data Center Operations and Maintenance Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Data Center Operations and Maintenance Services Market, Segmentation by Type:

Critical Facilities O&M

IT Infrastructure O&M

AI and HPC Cluster Operations

Full-stack Integrated O&M

Others

Global AI Data Center Operations and Maintenance Services Market, Segmentation by Cooling Architecture:

Air-cooled AIDC O&M

Direct-to-Chip Liquid-cooled AIDC O&M

Immersion-cooled AIDC O&M

Hybrid-cooled AIDC O&M

Others

Global AI Data Center Operations and Maintenance Services Market, Segmentation by Application:

Cloud and Internet Services

Telecommunications

Government and Public Services

Financial Services

Manufacturing and Industrial

Healthcare and Life Sciences

Education and Scientific Research

Energy and Utilities

Others

Companies Profiled:

Infosys Limited

Tech Mahindra Limited

Rackspace Technology, Inc.

DXC Technology Company

T-Systems International GmbH

Orange Business

Computacenter plc

NEC Corporation

Cognizant Technology Solutions Corporation

Unisys Corporation

Sopra Steria Group SA

Getronics N.V.

Alibaba Group Holding Limited

ByteDance Ltd.

Tencent Holdings Limited

Baidu, Inc.

JD.com, Inc.

Meituan

China Telecom Corporation Limited

China Mobile Limited

China Unicom Hong Kong Limited

Key Questions Answered

1. How big is the global AI Data Center Operations and Maintenance Services market?
2. What is the demand of the global AI Data Center Operations and Maintenance Services market?
3. What is the year over year growth of the global AI Data Center Operations and Maintenance Services market?
4. What is the total value of the global AI Data Center Operations and Maintenance Services market?
5. Who are the Major Players in the global AI Data Center Operations and Maintenance Services market?
6. What are the growth factors driving the market demand?

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