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Global AI Data Center Operations and Maintenance Services Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global AI Data Center Operations and Maintenance Services market size is predicted to grow from US$ 3412 million in 2025 to US$ 8434 million in 2032; it is expected to grow at a CAGR of 13.3% from 2026 to 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

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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

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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

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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

LPI (LP Information)' newest research report, the “AI Data Center Operations and Maintenance Services Industry Forecast” looks at past sales and reviews total world AI Data Center Operations and Maintenance Services sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Data Center Operations and Maintenance Services sales for 2026 through 2032. With AI Data Center Operations and Maintenance Services sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world AI Data Center Operations and Maintenance Services industry.

This Insight Report provides a comprehensive analysis of the global AI Data Center Operations and Maintenance Services landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on AI Data Center Operations and Maintenance Services portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global AI Data Center Operations and Maintenance Services market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Data Center Operations and Maintenance Services and breaks down the forecast by Type, by Application, geography, and market size to

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highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AI Data Center Operations and Maintenance Services.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Data Center Operations and Maintenance Services market by product type, application, key players and key regions and countries.

Segmentation by Type:

Critical Facilities O&M

IT Infrastructure O&M

AI and HPC Cluster Operations

Full-stack Integrated O&M

Others

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

Segmentation by Application:

Cloud and Internet Services

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Telecommunications

Government and Public Services

Financial Services

Manufacturing and Industrial

Healthcare and Life Sciences

Education and Scientific Research

Energy and Utilities

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

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- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

- Infosys Limited
- Tech Mahindra Limited

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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

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