Data Center Infrastructure Management Software Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented by Component (Solutions, services), By Deployment Type (On-premises, cloud-based), By Vertical (IT and telecom, BFSI, government, healthcare, retail, manufacturing, energy), By Region, By Competition, 2018-2028

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Abstracts

Global Data Center Infrastructure Management Software market has experienced tremendous growth in recent years and is poised to maintain strong momentum through 2028. The market was valued at USD 2.02 billion in 2022 and is projected to register a compound annual growth rate of 10.12% during the forecast period.

Global Data Center Infrastructure Management (DCIM) software market has witnessed substantial growth in recent years, fueled by its widespread adoption across various industries globally. Critical sectors such as IT, telecommunications, banking and finance, healthcare, and government have come to recognize DCIM software as vital tools for optimizing data center operations and improving productivity.

Stricter energy efficiency standards and heightened focus on reducing carbon footprint have compelled large organizations to make significant investments in advanced DCIM solutions. Leading DCIM vendors have launched innovative product offerings boasting higher scalability, greater reliability, and intelligent controls. These improvements have significantly enhanced data center efficiency.

Furthermore, the integration of emerging technologies such as artificial intelligence, Internet of Things, and predictive maintenance is transforming DCIM software

capabilities. Advanced solutions now provide real-time performance monitoring, automated diagnostics, and generate insights into infrastructure health. This allows data center managers to better track asset utilization and extract more value from their IT infrastructure.

Large enterprises are actively partnering with DCIM providers to develop customized solutions catering to their specific operational needs. Additionally, growing emphasis on sustainability and reducing carbon emissions is opening new opportunities.

The global DCIM software market is poised for sustained growth as digital transformation initiatives across various industries continue. Investments in new capabilities are expected to persist globally. The market's ability to support data-driven operations through AI-powered solutions will be instrumental to its long-term prospects.

Key Market Drivers

Increasing Demand for Efficient Data Center Operations

The Data Center Infrastructure Management (DCIM) software market is being driven by the increasing demand for efficient data center operations. As organizations across various industries continue to rely heavily on data centers to store, process, and manage their critical business data, the need for effective management and optimization of these data centers becomes paramount. DCIM software provides comprehensive tools and functionalities to monitor, control, and optimize data center infrastructure, including power usage, cooling systems, asset management, and capacity planning. By implementing DCIM solutions, businesses can gain real-time visibility into their data center operations, identify inefficiencies, and make informed decisions to improve energy efficiency, reduce costs, and enhance overall performance. The growing recognition of the importance of efficient data center operations is driving the adoption of DCIM software across industries, fueling the growth of the market.

Rising Focus on Energy Efficiency and Sustainability

Another significant driver for the Data Center Infrastructure Management Software market is the rising focus on energy efficiency and sustainability. With the increasing demand for data centers, there is a corresponding increase in energy consumption and carbon emissions. This has led to a growing concern among organizations and regulatory bodies regarding the environmental impact of data centers. Stricter energy efficiency standards and regulations are being imposed to reduce carbon footprint and

promote sustainable practices in data center operations. DCIM software plays a crucial role in addressing these concerns by providing advanced monitoring and management capabilities to optimize energy usage, identify energy wastage, and implement energy-saving measures. By leveraging DCIM solutions, businesses can track and analyze energy consumption patterns, implement intelligent cooling and power management strategies, and achieve significant energy savings. The growing emphasis on energy efficiency and sustainability is driving the adoption of DCIM software as organizations strive to meet regulatory requirements, reduce operational costs, and demonstrate their commitment to environmental responsibility.

Increasing Complexity of Data Center Infrastructure

The increasing complexity of data center infrastructure is another driver for the Data Center Infrastructure Management Software market. As organizations expand their digital footprint and adopt technologies such as cloud computing, big data analytics, and Internet of Things (IoT), the complexity of their data center infrastructure grows exponentially. Managing and optimizing this complex infrastructure manually becomes challenging and prone to errors. DCIM software provides a centralized platform to monitor and manage the entire data center ecosystem, including servers, storage, networking equipment, and virtualized environments. It offers features such as real-time monitoring, asset tracking, capacity planning, and predictive analytics to ensure optimal performance and availability of critical IT resources. By leveraging DCIM solutions, businesses can streamline their data center operations, improve resource utilization, minimize downtime, and enhance overall efficiency. The increasing complexity of data center infrastructure necessitates the adoption of DCIM software to effectively manage and optimize these complex environments, driving the growth of the market.

In conclusion, the Data Center Infrastructure Management Software market is being driven by the increasing demand for efficient data center operations, rising focus on energy efficiency and sustainability, and the increasing complexity of data center infrastructure. As organizations strive to optimize their data center operations, reduce energy consumption, and manage complex infrastructure, the adoption of DCIM software becomes crucial. The market is expected to continue its growth trajectory as businesses recognize the value of DCIM solutions in improving operational efficiency, reducing costs, and ensuring the sustainability of their data center operations.

Key Market Challenges

Integration Challenges with Legacy Systems

One of the key challenges facing the Data Center Infrastructure Management (DCIM) software market is the integration with legacy systems. Many organizations have existing data center infrastructure and management systems that have been in place for years. These legacy systems may not be compatible with modern DCIM solutions, making the integration process complex and time-consuming. The lack of standardized protocols and interfaces across different systems further complicates the integration efforts.

Integrating DCIM software with legacy systems requires careful planning, customization, and sometimes even the replacement of outdated hardware and software components. This can result in additional costs and disruptions to ongoing operations. Moreover, the integration process may require extensive data migration, mapping, and synchronization, which can be challenging and prone to errors.

Another aspect of integration challenges is the need to ensure interoperability between different vendors' DCIM solutions and other management systems within the data center ecosystem. This requires establishing seamless communication and data exchange between various software and hardware components, such as servers, storage devices, networking equipment, and environmental monitoring systems.

To overcome these integration challenges, organizations need to carefully evaluate their existing infrastructure, identify compatibility issues, and develop a comprehensive integration strategy. Collaboration between DCIM vendors, legacy system providers, and IT teams is crucial to ensure a smooth integration process and minimize disruptions to data center operations.

Complexity of Implementation and Customization

The complexity of implementation and customization is another significant challenge for the Data Center Infrastructure Management Software market. Implementing a DCIM solution involves various stages, including system design, configuration, deployment, and testing. Each stage requires careful planning, coordination, and expertise to ensure a successful implementation.

The customization of DCIM software to meet specific business requirements adds another layer of complexity. Organizations have unique data center infrastructure and management needs, and they often require tailored functionalities and workflows to align with their operational processes. Customizing DCIM software involves defining

and implementing custom data models, workflows, reports, and dashboards, which can be time-consuming and resource-intensive.

Moreover, the complexity of implementation and customization is amplified by the need to train and educate the IT staff on using the new DCIM software effectively. The IT team needs to understand the intricacies of the software, its features, and functionalities to maximize its benefits. This requires investing in training programs and allocating sufficient time for the IT staff to familiarize themselves with the new system.

To address the challenges related to implementation and customization, organizations should engage with experienced DCIM vendors who can provide guidance and support throughout the implementation process. It is essential to conduct a thorough assessment of business requirements, define clear objectives, and establish realistic timelines and milestones. Collaboration between the IT team, DCIM vendors, and other stakeholders is crucial to ensure a successful implementation and customization of the software.

In conclusion, the Data Center Infrastructure Management Software market faces challenges related to the integration with legacy systems and the complexity of implementation and customization. Overcoming these challenges requires careful planning, collaboration, and expertise. Organizations need to evaluate their existing infrastructure, develop integration strategies, and engage with experienced DCIM vendors to ensure a smooth integration process. Additionally, they should invest in training programs and allocate sufficient resources for the implementation and customization of DCIM software. By addressing these challenges effectively, organizations can unlock the full potential of DCIM solutions and optimize their data center operations.

Key Market Trends

Adoption of Artificial Intelligence and Machine Learning

One of the prominent trends in the Data Center Infrastructure Management (DCIM) software market is the increasing adoption of artificial intelligence (AI) and machine learning (ML) technologies. AI and ML algorithms are being integrated into DCIM solutions to provide advanced analytics, predictive capabilities, and automation. These technologies enable data center operators to gain deeper insights into their infrastructure, identify patterns, and make data-driven decisions.

AI-powered DCIM solutions can analyze vast amounts of data collected from various sensors and devices within the data center. They can detect anomalies, predict potential failures, and recommend proactive measures to optimize performance and prevent downtime. For example, AI algorithms can analyze temperature and humidity data to optimize cooling systems, or predict equipment failures based on historical data and recommend maintenance actions.

Machine learning algorithms can continuously learn from data center operations, enabling the DCIM software to adapt and improve over time. This helps in optimizing resource allocation, capacity planning, and energy management. ML algorithms can also automate routine tasks, such as asset discovery and inventory management, freeing up IT staff to focus on more strategic initiatives.

The adoption of AI and ML in DCIM software is driven by the increasing complexity of data center operations and the need for real-time insights and automation. As organizations strive to optimize their data center performance, reduce costs, and enhance efficiency, AI-powered DCIM solutions are becoming essential tools in their digital transformation journey.

Integration with Cloud and Edge Computing

Another significant trend in the Data Center Infrastructure Management Software market is the integration with cloud and edge computing environments. With the rapid growth of cloud services and the proliferation of edge computing devices, organizations are adopting hybrid IT infrastructures that combine on-premises data centers, cloud resources, and edge computing nodes.

DCIM software is evolving to support the management and monitoring of these distributed and heterogeneous environments. Integration with cloud platforms allows organizations to gain centralized visibility and control over their entire infrastructure, regardless of its location. This enables efficient resource allocation, workload management, and capacity planning across different environments.

Furthermore, the rise of edge computing, where data processing and storage occur closer to the source of data generation, presents unique challenges in managing and monitoring these distributed edge nodes. DCIM solutions are being enhanced to provide real-time monitoring, remote management, and predictive analytics for edge computing infrastructure. This enables organizations to ensure the availability, performance, and security of their edge computing deployments.

The integration of DCIM software with cloud and edge computing environments is driven by the need for seamless management and optimization of hybrid IT infrastructures. As organizations embrace the flexibility and scalability offered by cloud and edge computing, DCIM solutions that can effectively manage these distributed environments will be in high demand.

Focus on Data Center Sustainability and Green Initiatives

A significant trend shaping the Data Center Infrastructure Management Software market is the increasing focus on data center sustainability and green initiatives. As data centers continue to consume significant amounts of energy and contribute to carbon emissions, organizations are under pressure to reduce their environmental impact and operate more sustainably.

DCIM software plays a crucial role in supporting sustainability efforts by providing tools and functionalities to optimize energy usage, monitor power consumption, and implement energy-saving measures. DCIM solutions can track and analyze energy consumption patterns, identify inefficiencies, and recommend strategies to improve energy efficiency. This includes optimizing cooling systems, implementing virtualization techniques, and leveraging power management features.

Furthermore, DCIM software can help organizations monitor and manage their carbon footprint by tracking and reporting on energy usage and emissions. This enables businesses to comply with regulatory requirements, demonstrate their commitment to sustainability, and meet the expectations of environmentally conscious customers.

The focus on data center sustainability and green initiatives is driven by regulatory pressures, cost-saving opportunities, and the growing awareness of environmental responsibility. As organizations strive to achieve their sustainability goals, DCIM solutions that enable efficient energy management and support green initiatives will be in high demand.

In conclusion, the Data Center Infrastructure Management Software market is witnessing trends such as the adoption of artificial intelligence and machine learning, integration with cloud and edge computing environments, and a focus on data center sustainability and green initiatives. These trends are driven by the need for advanced analytics, automation, and optimization in data center operations, as well as the increasing complexity of hybrid IT infrastructures and the growing emphasis on

environmental responsibility. Organizations that embrace these trends and leverage DCIM software to enhance their data center management capabilities will be well-positioned to optimize their operations, improve efficiency, and drive sustainable growth..

Segmental Insights

Component Insights

In 2022, the solutions segment dominated the Data Center Infrastructure Management (DCIM) software market and is expected to maintain its dominance during the forecast period. Solutions in the DCIM market refer to the software applications and platforms that provide comprehensive functionalities for monitoring, managing, and optimizing data center infrastructure.

The dominance of the solutions segment can be attributed to several factors. Firstly, organizations across various industries have recognized the importance of efficient data center operations and the need for comprehensive management solutions. DCIM solutions offer features such as real-time monitoring, asset management, capacity planning, power and cooling management, and security management. These functionalities enable businesses to gain visibility into their data center infrastructure, identify inefficiencies, and make informed decisions to improve performance and reduce costs.

Secondly, the increasing complexity of data center infrastructure has driven the demand for robust and scalable solutions. With the adoption of technologies such as cloud computing, big data analytics, and Internet of Things (IoT), data centers have become more intricate and dynamic. DCIM solutions provide the necessary tools and capabilities to manage and optimize these complex environments effectively. They enable organizations to track and manage assets, monitor power and cooling systems, ensure compliance with regulations, and plan for future capacity needs.

Furthermore, the solutions segment has witnessed significant advancements in recent years, with vendors continuously innovating and enhancing their offerings. DCIM software providers have focused on developing user-friendly interfaces, integrating artificial intelligence and machine learning capabilities, and improving automation features. These advancements have made DCIM solutions more powerful, intuitive, and adaptable to the evolving needs of data center operators.

Looking ahead, the solutions segment is expected to maintain its dominance in the DCIM software market during the forecast period. The increasing adoption of digital transformation initiatives, the growing demand for energy-efficient data center operations, and the need for real-time insights and automation will continue to drive the demand for comprehensive DCIM solutions. Additionally, the ongoing advancements in technology, such as the integration of AI and ML, will further enhance the capabilities of DCIM solutions, solidifying the dominance of the solutions segment in the market.

Deployment Type Insights

In 2022, the cloud-based deployment type segment dominated the Data Center Infrastructure Management (DCIM) software market and is expected to maintain its dominance during the forecast period. Cloud-based deployment refers to the delivery of DCIM software through the cloud, where the software and associated data are hosted and accessed remotely over the internet.

The dominance of the cloud-based deployment segment can be attributed to several factors. Firstly, the cloud-based deployment offers numerous advantages over traditional on-premises deployment. It provides scalability, allowing organizations to easily scale their DCIM infrastructure as their data center needs grow. This flexibility is particularly beneficial for businesses experiencing rapid growth or those with fluctuating data center requirements

Secondly, cloud-based deployment offers cost savings and reduced upfront investment. With cloud-based DCIM solutions, organizations can avoid the need for significant hardware and infrastructure investments. Instead, they can subscribe to a cloud service and pay for the software on a subscription basis, typically on a monthly or annual basis. This pay-as-you-go model allows businesses to allocate their resources more efficiently and reduce their capital expenditure.

Furthermore, cloud-based deployment offers greater accessibility and remote management capabilities. With cloud-based DCIM solutions, data center operators can access and manage their infrastructure from anywhere, at any time, using a web browser or mobile application. This remote accessibility is particularly valuable for organizations with multiple data center locations or those with distributed teams. It enables real-time monitoring, management, and collaboration, enhancing operational efficiency and agility.

Looking ahead, the cloud-based deployment segment is expected to maintain its

dominance in the DCIM software market during the forecast period. The increasing adoption of cloud computing and the growing preference for software-as-a-service (SaaS) models are driving the demand for cloud-based DCIM solutions. Additionally, the ongoing advancements in cloud technology, such as improved security measures and enhanced performance, are further boosting the confidence of organizations in adopting cloud-based deployments for their critical infrastructure management needs.

In conclusion, the cloud-based deployment segment dominated the DCIM software market in 2022 and is expected to maintain its dominance during the forecast period. The scalability, cost savings, accessibility, and remote management capabilities offered by cloud-based deployment make it an attractive choice for organizations seeking efficient and flexible solutions for their data center infrastructure management. As cloud technology continues to evolve and organizations increasingly embrace cloud computing, the dominance of the cloud-based deployment segment in the DCIM software market is expected to persist.

Regional Insights

In 2022, North America dominated the Data Center Infrastructure Management (DCIM) software market and is expected to maintain its dominance during the forecast period. North America encompasses countries such as the United States and Canada, which are known for their advanced technological infrastructure and widespread adoption of data center technologies.

The dominance of North America in the DCIM software market can be attributed to several factors. Firstly, the region has a high concentration of large enterprises and data center facilities, particularly in sectors such as IT, telecommunications, finance, and healthcare. These industries heavily rely on data centers to store, process, and manage their vast amounts of data, driving the demand for robust DCIM solutions.

Secondly, North America has been at the forefront of technological advancements and digital transformation initiatives. The region has witnessed significant investments in cloud computing, big data analytics, Internet of Things (IoT), and other emerging technologies that drive the complexity and scale of data center infrastructure. As a result, there is a strong need for effective management and optimization of these data centers, which fuels the demand for DCIM software.

Furthermore, North America has a mature and well-established IT infrastructure ecosystem. The region is home to several leading DCIM software vendors and

technology providers, offering a wide range of solutions and services. The presence of these established players, along with their strong customer base and extensive industry partnerships, contributes to the dominance of North America in the DCIM software market.

Looking ahead, North America is expected to maintain its dominance in the DCIM software market during the forecast period. The region is projected to witness continued investments in data center infrastructure, driven by factors such as the increasing volume of data generated, the growing adoption of cloud services, and the need for efficient data management and security. Additionally, the region's focus on sustainability and energy efficiency in data center operations aligns with the capabilities offered by DCIM software, further driving its demand.

In conclusion, North America dominated the DCIM software market in 2022 and is expected to maintain its dominance during the forecast period. The region's advanced technological infrastructure, concentration of large enterprises and data centers, and mature IT ecosystem contribute to its leadership position. As North America continues to drive technological innovation and digital transformation, the demand for DCIM software solutions is expected to remain strong in the region.

Key Market Players

Schneider Electric

Vertiv Holdings Company

Nlyte Software

Panduit

Sunbird Software

COMMSCOPE

Rackwise

Aplena

Raritan

Eaton Corporation

Report Scope:

In this report, the Global Data Center Infrastructure Management Software Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Data Center Infrastructure Management Software Market, By Component:

Solutions

services

Data Center Infrastructure Management Software Market, By Deployment Type:

On-premises

cloud-based

Data Center Infrastructure Management Software Market, By Vertical:

IT and telecom

BFSI

Government

Healthcare

Retail

Manufacturing

Energy

Data Center Infrastructure Management Software Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Data Center Infrastructure Management Software Market.

Available Customizations:

Global Data Center Infrastructure Management Software Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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