

DATA REPORT

Uptime Institute Global Data Center Survey 2026: supplier view

Douglas Donnellan, Research Analyst, ddonnellan@uptimeinstitute.com

The Uptime Institute Global Data Center Survey, now in its 16th year, is the most comprehensive and longest running study of its kind. This report highlights some of the results from vendor, consultant and product supplier respondents and provides an insight into the spending strategies, technology adoption and issues facing their customers. For analysis of the survey results from more than 800 data center operators and owners, see the full report (*Uptime Institute Global Data Center Survey 2026*).

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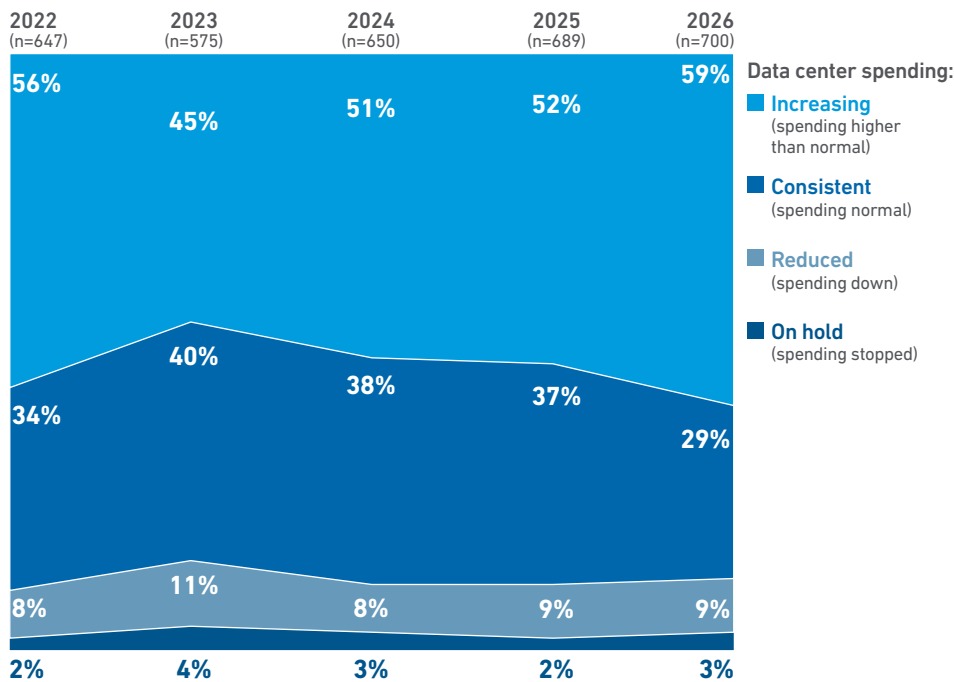
The Uptime Institute Global Data Center Survey 2026, conducted online in April and May 2026, had more than 800 data center owner and operator respondents and more than 800 supplier respondents. This report highlights some of the findings from supplier respondents.

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More vendors report higher customer spending

Vendors, designers and consultants continue to report strong customer spending. In 2026, 59% reported customer spending patterns for data center products and services as higher than normal — the greatest share in the past 5 years (see **Figure 1**). The rise from 52% in 2025 came almost entirely from a decline in the proportion of vendor respondents who say spending patterns are "normal", rather than from fewer respondents reporting reduced or halted spending. This suggests that some customers may be shifting from routine expenditure toward more intensive investment. However, the results do not reveal whether higher spending reflects new construction, capacity expansion, modernization, rising costs or other priorities.

Figure 1
How would you characterize the current willingness of your customers to spend money on data center products and/or services?



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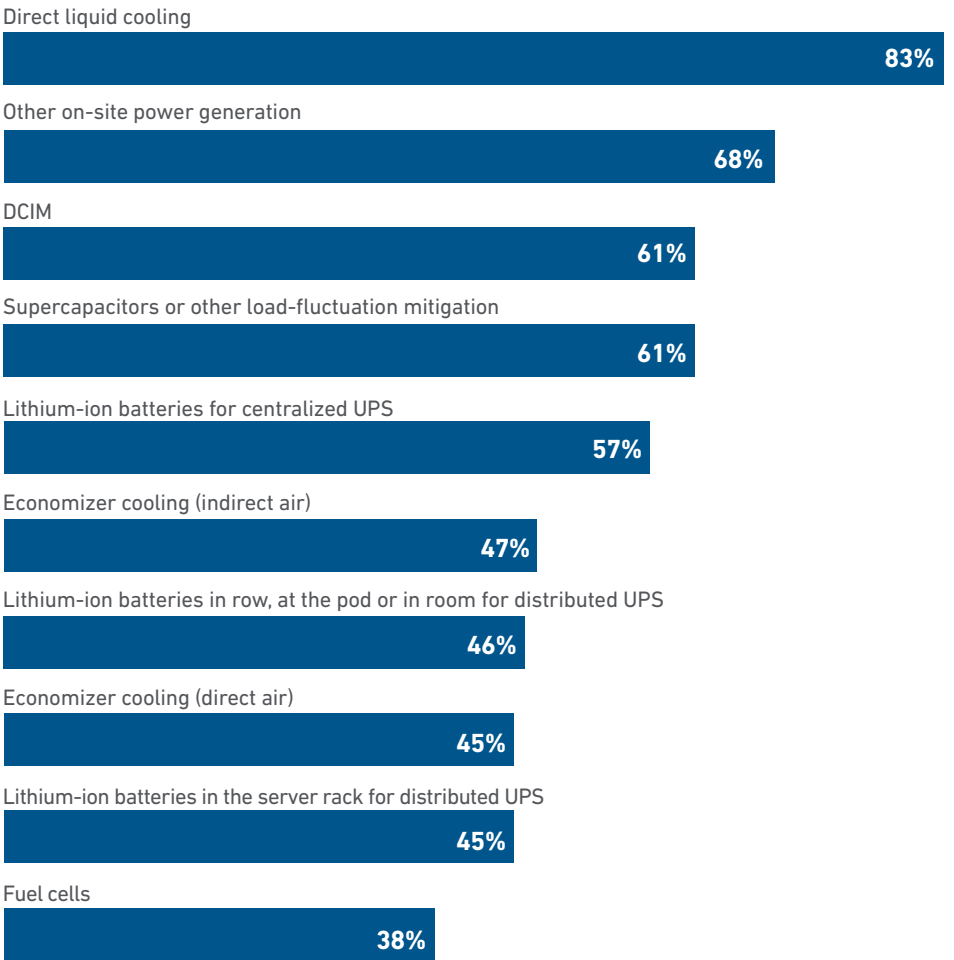
Vendors suggest strongest adoption growth in liquid cooling

Vendors report strong momentum in technology adoption in 2026. The greatest share of respondents say customer adoption rates are increasing across all technologies assessed except fuel cells (Figure 2). Direct liquid cooling stands out at 83%, possibly reflecting the growing cooling demands of high-density workloads. However, the data does not indicate how widely liquid cooling has already been deployed. Two other options introduced in 2026 — “other onsite power generation” (68%) and “load-fluctuation mitigation” (61%) — also received a high response. However, because neither was included in earlier surveys, there is no baseline for measuring change.

Results were largely stable for technologies tracked in both 2025 and 2026. The main exception was economizer cooling, for which shares reporting increased adoption fell by about nine percentage points for both direct- and indirect-air systems. This may reflect the more established use of economizer cooling, with adoption levels stabilizing rather than declining.

Figure 2

For each of the following technologies, please tell us whether your customer adoption rates are increasing? (n=606)

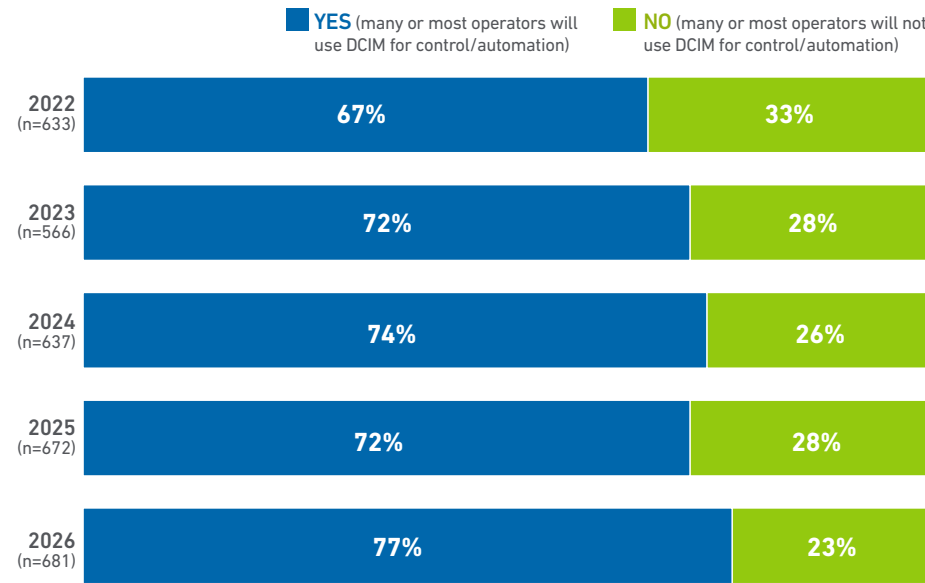


More vendors expect DCIM to be used for automation/control

Vendor expectations for DCIM adoption continue to rise. In 2026, more than three in four (77%) vendors anticipate that operators will use DCIM for automation and control within 5 years — a 10 percentage-point increase from 2022, and the highest share in the series (see **Figure 3**). This expectation is supported by results in the previous section (see **Figure 2**), which show 61% report increasing DCIM adoption (up slightly from 59% in 2025). Together, these findings suggest that vendors expect both wider use of DCIM and an expansion of its operational role, moving beyond monitoring and reporting toward more active control and automation. However, both results reflect vendor perceptions and expectations rather than measured deployment, and they do not show how many operators currently use DCIM for automated control.

Figure 3

DCIM systems have mostly been used for monitoring and reporting, and not for control and automation. Do you think this will change in the next 5 years?



Vendors remain confident in AI's operational benefits

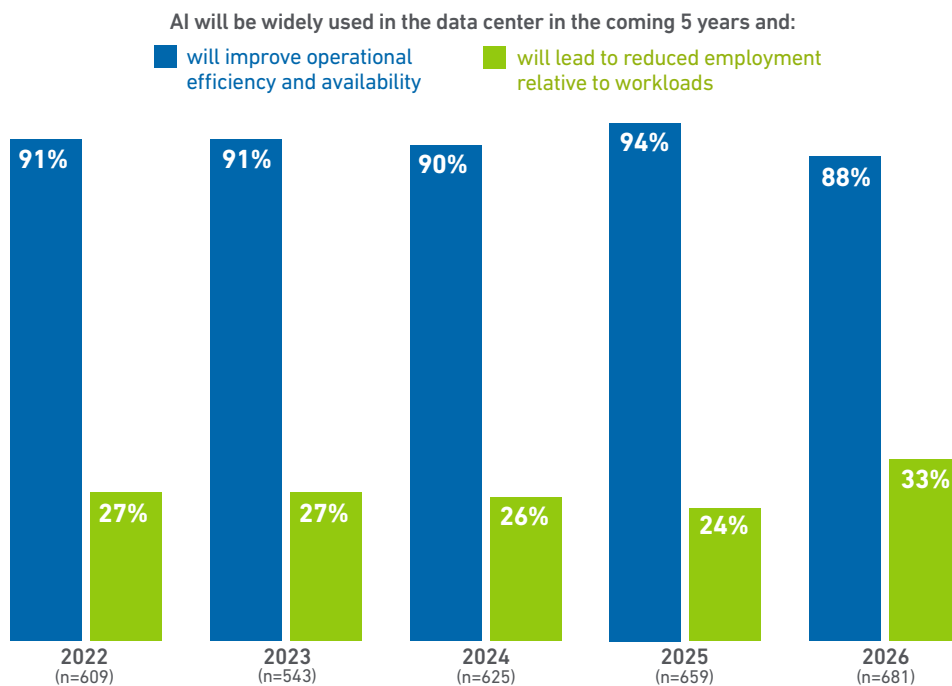
Vendors remain broadly confident that AI will improve data center operations in terms of efficiency and availability, although expectations have lessened slightly (see **Figure 4**). In 2026, 88% indicated that AI will be widely used to improve operational efficiency and availability within 5 years — a six-percentage point reduction from 2025, and the lowest share in the series. This decline may suggest that vendors' expectations of AI are becoming more realistic as practical deployment challenges become clearer.

At the same time, 33% expect AI to reduce employment relative to workloads, up from 24% in 2025 and the highest share recorded. This suggests that vendors increasingly expect data centers to handle more workloads without a proportional increase in staffing levels. AI may automate parts of existing roles, slow the pace of hiring and shift more employees into oversight and specialist work.

This does not necessarily imply net job losses since the industry may continue adding staff, albeit at a slower pace than workload growth. If realized, these changes are likely to take time. Separate survey findings from data center operator respondents suggest that AI use will remain concentrated in analytics and predictive maintenance in the near term (see *Uptime Institute Global Data Center Survey 2026*).

Figure 4

Which of the following statements are likely?



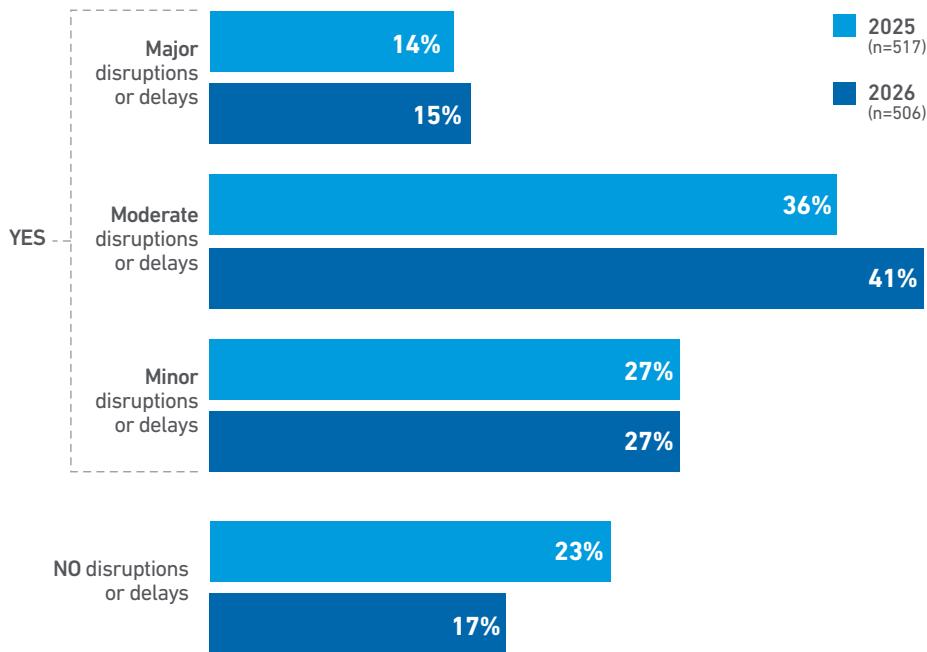
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More vendors report disruption to data center build projects

Supply chain disruption remains a challenge for data center build projects — and may be worsening. In 2026, 83% of vendors, designers and consultants reported some level of disruption (up from 77% in 2025), with the year-over-year shift concentrated among respondents reporting moderate or major delays (see **Figure 5**). Persistent shortages of specialized equipment are likely behind these delays. Components such as transformers, switchgear, and generators can have long lead times, limited manufacturing capacity and few substitutes (if any). One missing component can create significant delays because they are often prerequisites for installation, testing or commissioning. Supply-chain problems are only one source of project delay; limited power availability and lengthy grid-connection timelines can create additional bottlenecks.

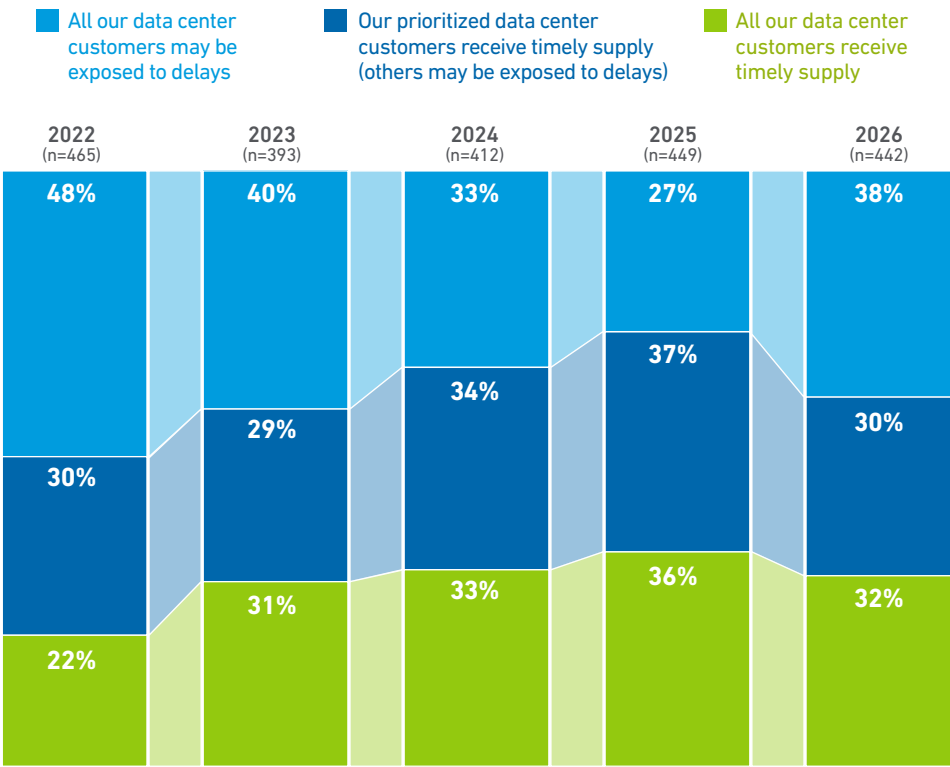
Figure 5
Have your organization's data center build projects suffered supply chain disruptions over the past 6 months?



Customer exposure to supply delays rises again

After showing signs of improvement in 2024 and 2025, product-supply delays appear to be affecting a wider share of vendors’ customers. In 2026, 38% of vendors said all their data center customers may be exposed to delays, up from 27% in 2025, while fewer vendors reported being able to supply even their highest-priority customers on time (Figure 6). The length of these delays, however, shows little change compared to previous years. This is consistent with findings from a separate survey question, where 58% of vendors report delays lasting at least 3 months. As a result, delays appear to affect more customers rather than create longer delays for each customer. High demand and limited manufacturing capacity for specialized equipment are the likely drivers. Geopolitical conflicts and shipping disruptions may be contributing factors, but the pattern is more consistent with the equipment bottlenecks discussed in the previous section.

Figure 6
Which of the following best describes the timeliness of your product supply to your data center customers?

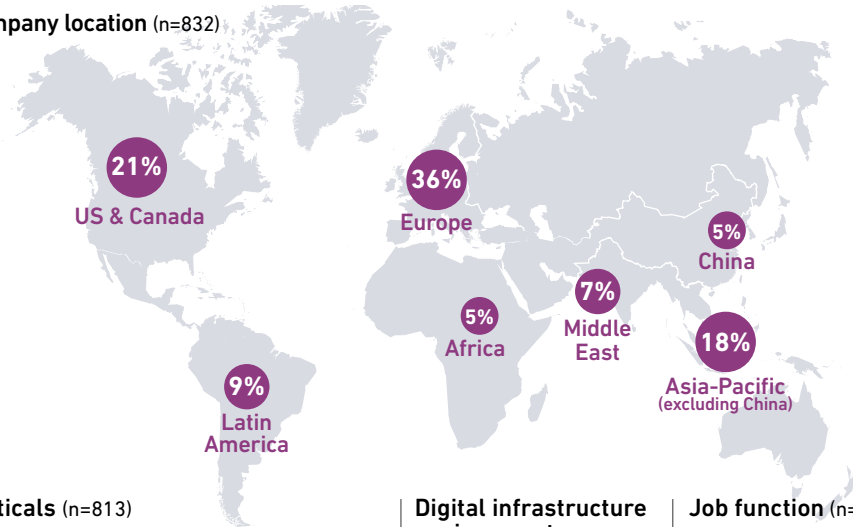


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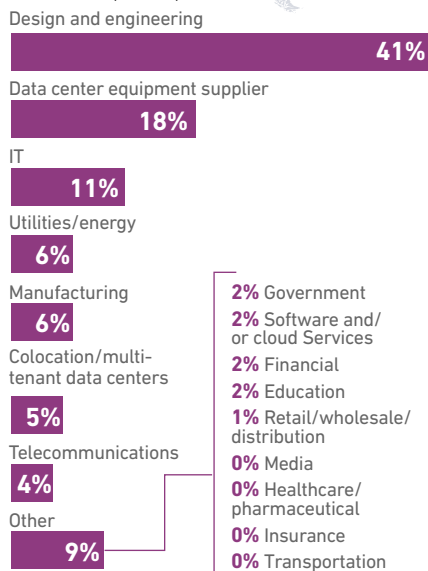


Demographics: Uptime Institute Global Data Center Survey 2026 (supplier view)

Company location (n=832)

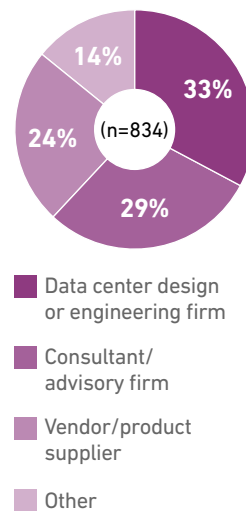


Verticals (n=813)

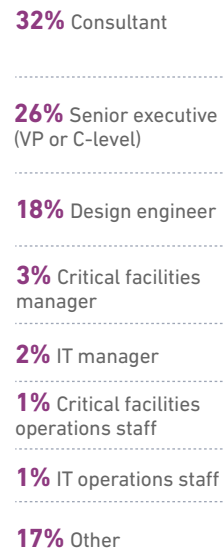


2% Government
2% Software and/or cloud Services
2% Financial
2% Education
1% Retail/wholesale/distribution
0% Media
0% Healthcare/pharmaceutical
0% Insurance
0% Transportation

Digital infrastructure environment



Job function (n=614)



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Douglas Donnellan is a Research Analyst at Uptime Institute covering sustainability in data centers. His background includes environmental research and communications, with a strong focus on education. Contact: ddonnellan@uptimeinstitute.com

All general queries

Uptime Institute
405 Lexington Avenue
9th Floor
New York, NY 10174, USA
+1 212 505 3030
info@uptimeinstitute.com

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Uptime Education programs have been completed by more than 100,000 data center professionals, establishing Uptime as the Learning & Development partner of choice worldwide. Uptime Institute is headquartered in New York, NY, with offices in London, Sao Paulo, Dubai, Riyadh, Singapore, and Madrid, and full-time Uptime professionals based in over thirty-four countries around the world.

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