

# Data Center Thermal Management & Sustainability Intelligence Service

## Part of the Cloud & Data Center Service Area Package

Comprehensive insight and analysis of sustainable data center practices and strategies with a focus on new technologies like liquid cooling and energy storage.

“ The stakes are high when it comes to data center sustainability. There is a need for an industrywide conversation on not only the use of clean energy, but also energy and other resource efficiency, ethical sourcing, recycling and reusing equipment, etc. ”

**Vlad Galabov**  
Research Director

# Data Center Thermal Management & Sustainability Intelligence Service

Part of the Cloud & Data Center Service Area Package

## KEY QUESTIONS ANSWERED

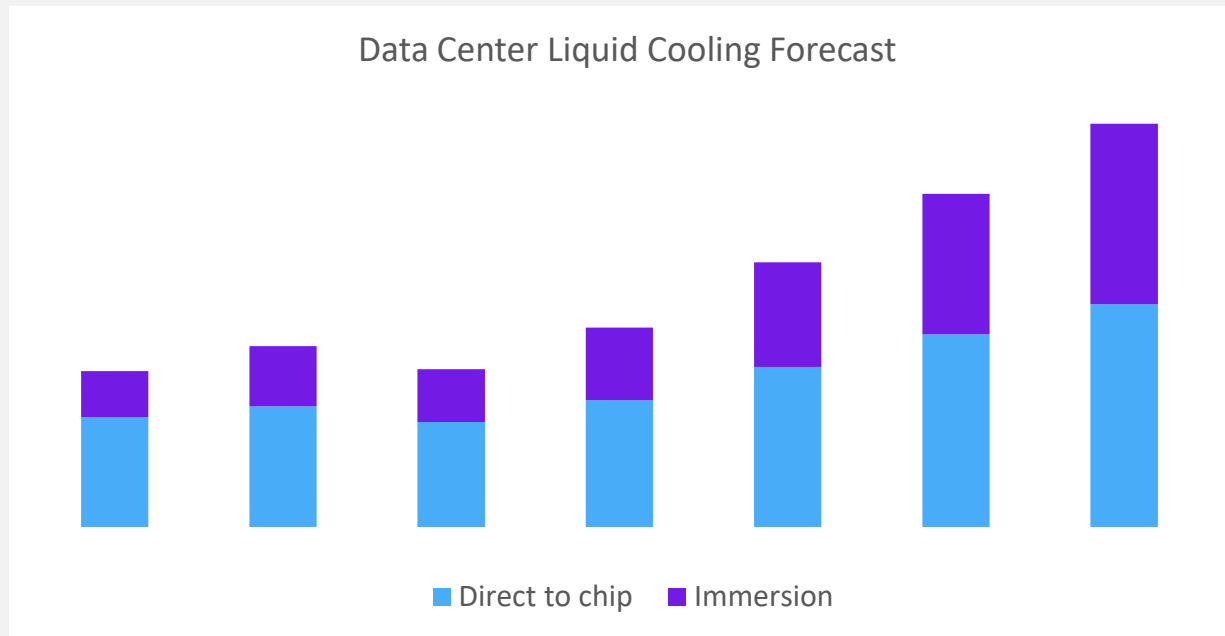
- What strategies can improve data center sustainability?
- What incentives are there for data center operators?
- Are operators investing in liquid cooling?
- Who are the biggest thermal management vendors?
- How does energy storage enable sustainability?
- Who's partnering with who and why?

## HOW OMDIA HELPS YOU

- Outline ways to improve resource efficiency
- Understand data center investment enabling sustainability and what are the low hanging fruit
- Compare and contrast the actions and practices of data center operators
- Double click on thermal management strategies and how they will change in the future
- Map the key liquid cooling vendor and their solutions, and see their actual market share
- Follow key trends like AI-based analytics for data center management, equipment renewal and reuse, etc.

## NEW ENHANCEMENTS

- New sustainability strategies end-user survey
- Topical reports on new technologies enabling sustainability like energy storage
- New "Trends to Watch" report
- Sustainable data center list
- Data center sustainability incentives research




# Data Center Thermal Management & Sustainability: Our Experts

**Vlad Galabov**  
**Research Director**




- Open computing
- Hyperscale cloud service providers
- Semiconductor development

**Roy Illsley**  
**Chief Analyst**




- IT operations
- Application delivery
- Disruptive software technologies

**Moises Levy**  
**Principal Analyst**




- Power and cooling
- Energy efficiency
- Data center sustainability

**Alan Howard**  
**Principal Analyst**




- Colocation services
- Data center investment
- Location & construction strategies

**Manoj Sukumaran**  
**Principal Analyst**




- Compute systems
- Data center networks
- Disruptive hardware technologies

**Dennis Hahn**  
**Principal Analyst**




- Storage systems
- Data management
- Software-defined storage

**Vijendra Krishnamurthy**  
**Senior Analyst**




- Data center racks
- Rack power distribution
- Micro data centers

**Dominika Koncewicz**  
**Senior Analyst**




- SD-WAN platforms
- SASE & SD-WANaaS
- network service consolidation

**Nicole Tuggle**  
**Research Analyst**




- rPDU vendor share
- UPS hardware & service vendor share

**Keith Kirkpatrick**  
**Principal Analyst**




- Quantum computing
- High performance computing

**Currently Recruiting**  
**Principal Analyst**



- Kubernetes
- Cloud native software development

**Currently Recruiting**  
**Senior Analyst**



- Cloud services
- Data center buildout

# Data Center Thermal Management & Sustainability IS: Deliverables



## MARKET TRACKERS

—Annual—

- Data Center Thermal Management Tracker



## SURVEYS & REPORTS

—Annual—

- Data Center Thermal Management & Sustainability Strategies - End-user Survey
  - Data Center Sustainability Framework
    - The Sustainable Data Center List
  - Data Center Sustainability Incentives
    - “Trends to Watch”



## ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.



## BRIEFINGS

—Biannual—

Biannual scheduled briefings with analysts on research highlights from all aspects of the market.



## ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique questions.

# Data Center Thermal Management & Sustainability IS: Trackers

## Data Center Thermal Management Report

Provides a comprehensive overview of the data center thermal management market. Presents market size, share and forecasts by product, heat rejection type, segmented by region, vertical market, sales channel and cooling capacity.

### DETAILS

**Frequency:** Annual

**Measures**

- Revenues

**Regions**

- North America
- Latin America & the Caribbean
- Western Europe
- Rest of Europe, Middle East and Africa
- Asia and Oceania
- And 56 country and minor regions

### COVERAGE

**Product Types**

- Air handler units – indoor
- Air handler units – outdoor
- Ceiling mount
- Mini split
- Outdoor air handlers
- Rack
- Rear door heat exchangers
- Row
- Perimeter
- Liquid cooling: Direct to chip
- Liquid cooling: Immersion
- Chillers
- Containment

“ The sixth edition of Omdia’s Data Center Thermal Management study will build on our existing, detailed database of the market. We’re excited to be partnering with all major thermal management vendors to ensure this report provides detailed market share and forecast.

In Moises Levy, we have an industry expert and practitioner who can cover technology and adoption trends from multiple angles, including liquid cooling, evaporative, and air-side economizers. He will also discuss the continued use of DX and chilled water as methods for data center cooling. ”

**Vlad Galabov**  
Research Director

# Data Center Thermal Management & Sustainability IS: Reports

## Data Center Sustainability Framework

There isn't a singular answer or a one-stop solution to data center sustainability. At Omdia we think that the data center industry is a force for good. Apart from saving us time and keeping us connected with loved ones, it is helping humanity reduce its carbon footprint. However, there is a need for an industrywide conversation on not only the use of clean energy, but also other actions that drive sustainability, like GHG emissions, resource efficiency, ethical sourcing, and the principle of a circular economy. In this report we will map the data center sustainability paradigm, discuss different ways operators can be more sustainable, and highlight low hanging fruit.

## Data Center Thermal Management & Sustainability Strategies - End-user Survey

Interviews with at least 150 decision makers at data center operators in at least two major countries. Survey explores data center sustainability and thermal management investment drivers, barriers, purchasing strategies and top use cases.

## The Sustainable Data Center List

This report analyses, evaluates, and compares the sustainable practices of data center operators.

## Data Center Sustainability Incentives

A database of government incentives that can be used by data center operators to finance sustainable investment.

## 2023 Trends to Watch: Data Center Sustainability

Our experts summarize what the industry should be looking out for in the next year.

# Related Content: Cloud & Data Center Service Area Coverage



## Service Area Package: **Cloud & Data Center**

SD-WAN Platforms  
Intelligence Service

Data Center Compute  
Intelligence Service

Cloud-Native Software Development  
Intelligence Service

Data Center Storage  
Intelligence Service

IT Operations  
Intelligence Service

Data Center Networks &  
Automation Intelligence Service

Cloud and Colocation Services  
Intelligence Service

Uninterruptible Power Supplies  
Intelligence Service

DC Thermal Management and  
Sustainability Intelligence Service

Data Center Rack Systems  
Intelligence Service

## About Omdia's Cloud & Data Center Research

Omdia provides deep analysis of worldwide compute technologies – from cloud to the edge. Detailed and data-rich intelligence services cover all aspects of data center IT and physical infrastructure, software, cloud & colocation services, and the strategies required to manage the entire IT ecosystem.

Omdia's expert team of cloud and data center analysts provide strategic guidance, steeped in a robust foundation of data, to both vendors and technology decision makers. Omdia has consistently been 1<sup>st</sup> to market capturing market disruptions and technology transitions, helping IT decision makers and their vendors succeed in navigating these transitions. For technology decision makers, Omdia also provides guidance on vendor selection and best practices for management of IT operations.

The Cloud & Data Center team provides market analysis in the form of quarterly datasets with size, share and forecasts, end-user surveys, vendor assessments and personalized consulting.

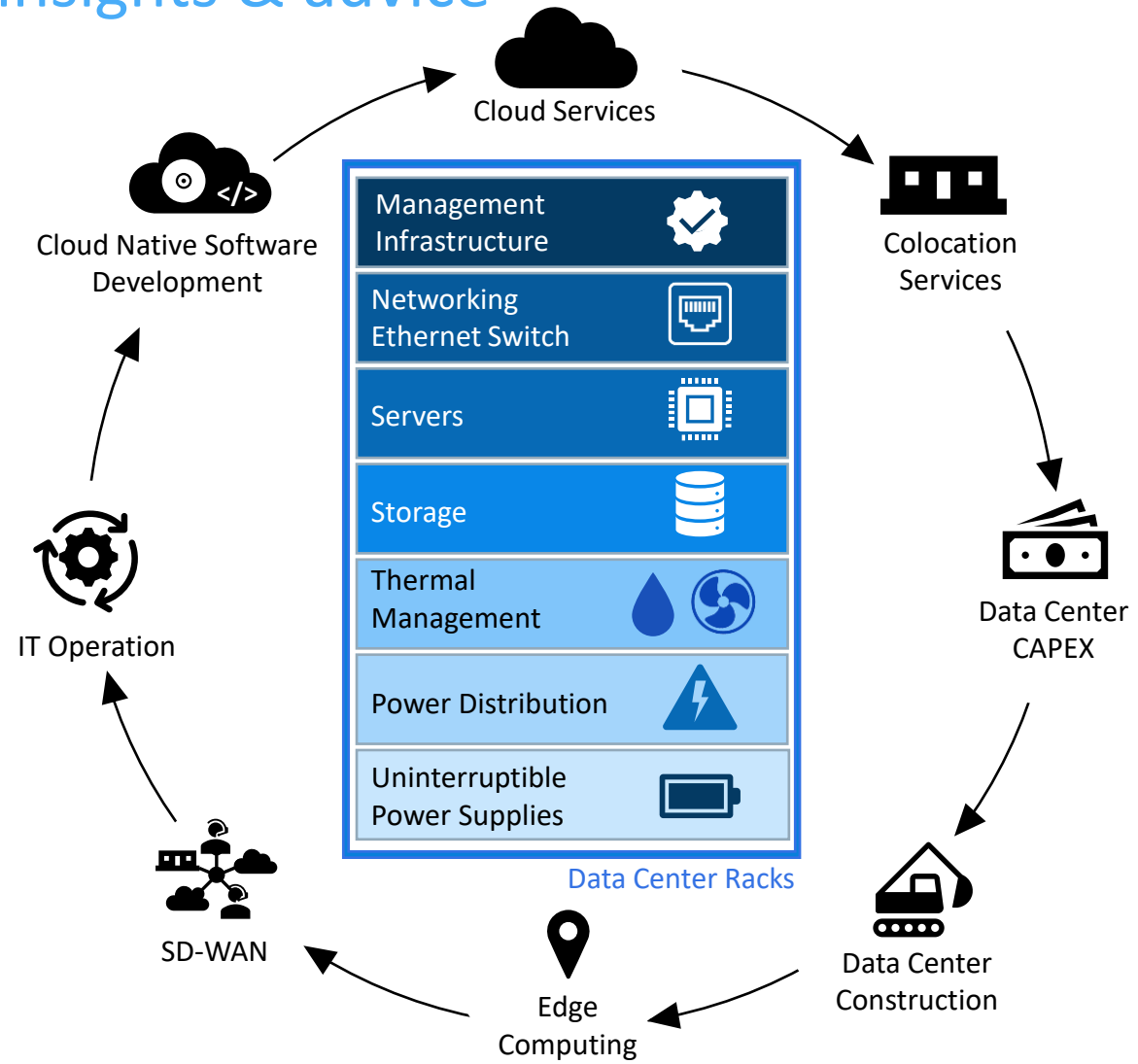
# Comprehensive data, insights & advice

## New in 2022

- Cloud Native Software Development
- Worldwide Data Growth Forecast
- High Performance Computing
- Data Center Sustainability Framework, Strategies, Incentives and Investment
- Thermal Management Strategies

## New in 2021

- Server Workload Forecast
- Data Center Sustainability
- Smart Grid UPS
- Infrastructure Management
- Cloud Storage



## Old but Gold

- Hyperscale Cloud Service Providers
- Server CPU transitions
- Heterogeneous Compute SmartNICs, AI Accelerators, GPUs
- Open Computing
- Servers in the telecom network
- AI Ops and Cloud Ops
- SD-WAN
- Data Center Buildings Tracker
- UPS Markets and Architectures
- Edge computing and micro DCs



# Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

## Draw on our expertise

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:



**Tom Coate**  
Customer Success  
Manager



**Kâren Dyer**  
Customer Success  
Manager



## CONNECT WITH US

 @OmdiaHQ | [omnia.com](https://www.omnia.com)

### Customer Success

E: [customersuccess@omnia.com](mailto:customersuccess@omnia.com)

---

### SALES

US: +1 (212) 652 5335

APAC: +61 (0)396 016 700

EMEA: +44 (0)7771 980 316

### ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio\*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

\* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.