

# Enterprise and colo spending strategies for 2026 vary

UII FIELD REPORT 192 | DECEMBER 2025

## SUMMARY

Data center operators in both enterprise and colocation segments anticipate larger budgets in 2026. While capacity expansion remains the primary driver of overall planned spending, investment priorities for supporting growth differ between the two groups — particularly in IT and staffing. Year-on-year shifts also indicate that cost pressures may be easing in some areas, giving operators room to adapt their financial strategies while balancing operational demands in the year ahead.

Results from the Uptime Institute Data Center Spending and Supply Chain Survey 2025 highlight the distinct spending priorities now emerging between enterprise operators and colocation providers.

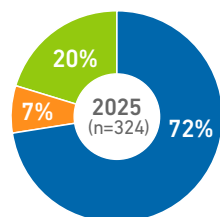
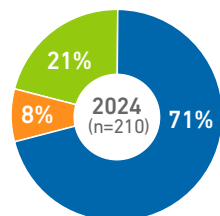
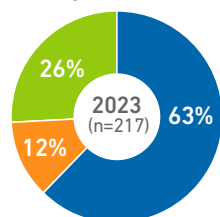
### ABOUT THIS SURVEY

The Uptime Institute Data Center Spending and Supply Chain Survey 2025, conducted online in September and October 2025, had more than 400 data center owners and operators. This report highlights some of the findings.

## Enterprises expect budgets to rise for a third consecutive year

How do you expect your company's budget (for facilities, power, hardware, etc.) to change in the next year?

■ Increase ■ Decrease ■ No change



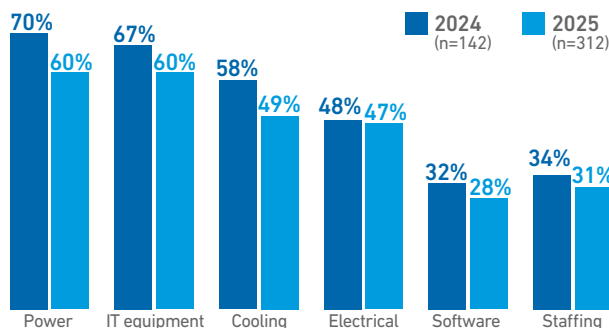
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## ENTERPRISE RESPONDENTS

### Enterprises expect lighter spending increases

Which of the following will you be spending more on in the next year compared to the past 12 months? Choose all that apply.

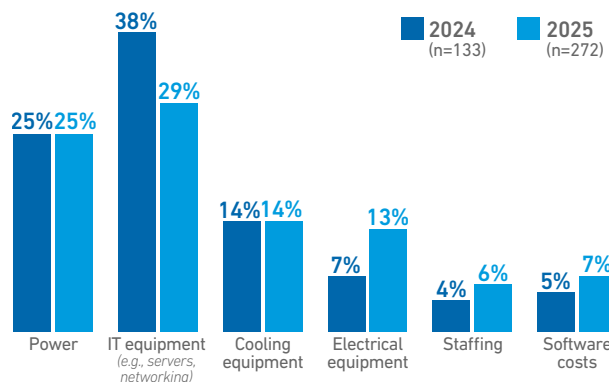


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### IT remains top enterprise spending increase, but momentum eases

Which of the following will experience the single greatest spending increase in the next year compared to the past 12 months?

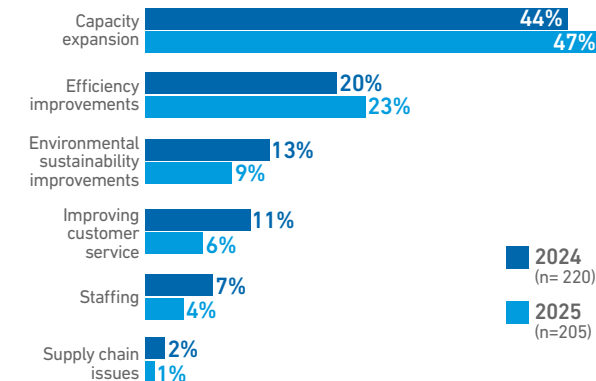


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### Enterprise spending keeps focus on expansion

Which of these is the biggest overall driver of your planned spending increase?

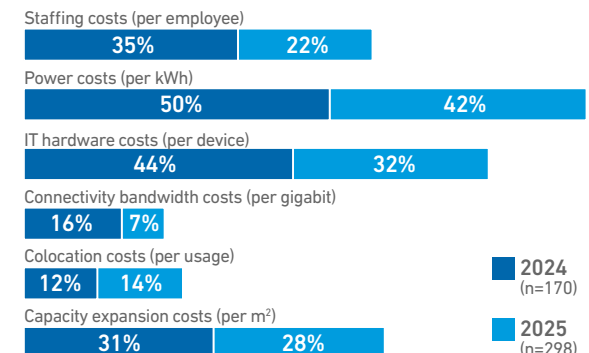


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### Enterprise costs rise more slowly

In which areas has your organization experienced the greatest unit cost increases over the past 12 months? Choose no more than two.



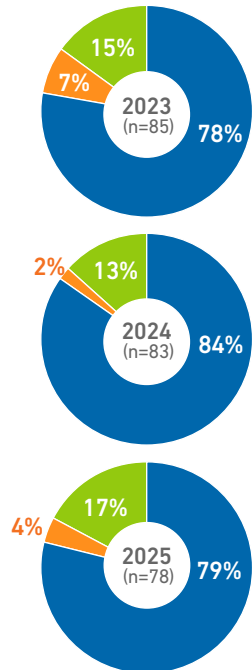
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### Colocation budget outlook stays strong despite small decline

Do you expect your company's budget (for facilities, power, IT hardware, etc.) to increase, decrease or remain the same in the next year compared to the past 12 months?

■ Increase ■ Decrease ■ No change



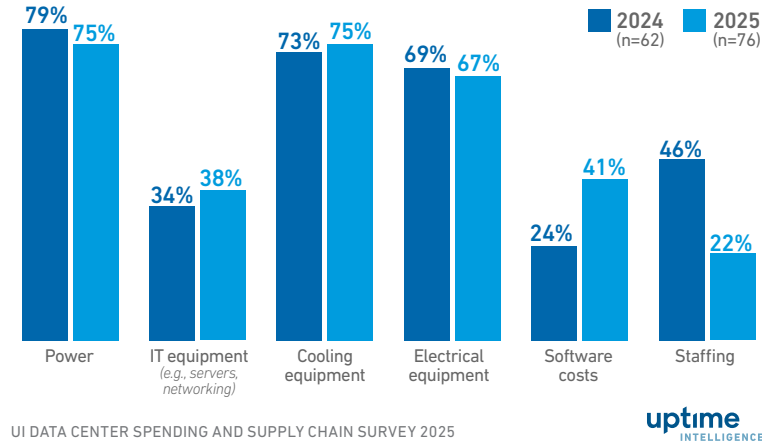
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### COLOCATION RESPONDENTS

#### Colocation spending plans shift towards software and away from staffing

Which of the following will you be spending more on in the next year compared to the past 12 months? Choose all that apply.

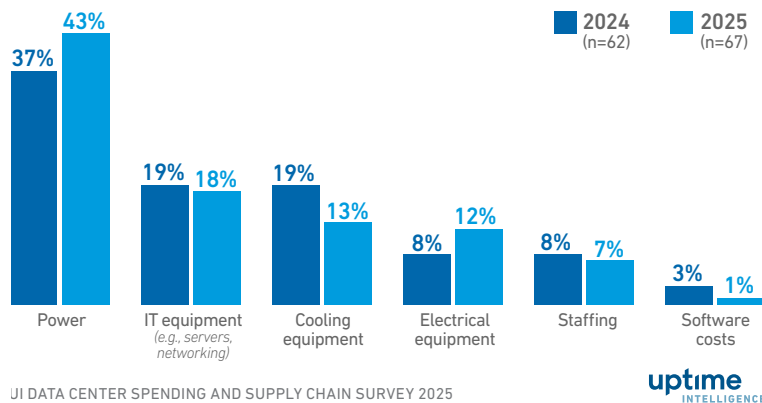


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#### Power remains the colocation spending priority

And which of the following will experience the single greatest spending increase in the next year compared to the past 12 months?

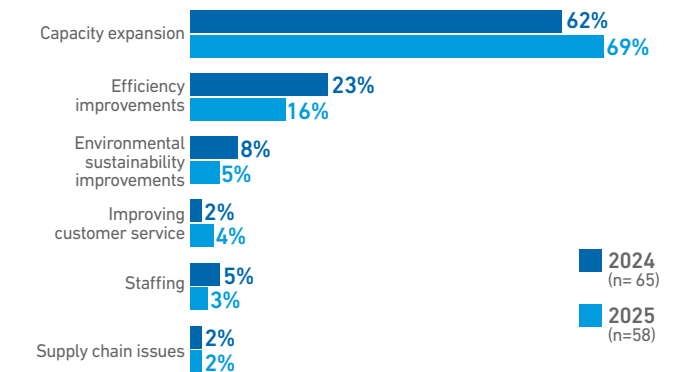


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#### Capacity expansion drives higher colocation spending

Which of these is the most significant overall driver of your planned spending increase?

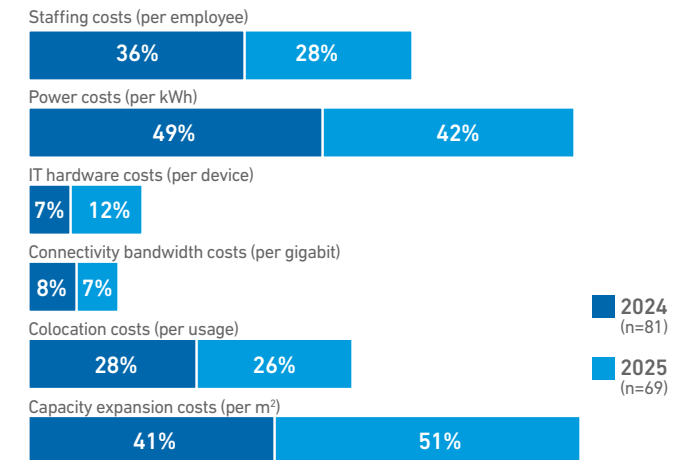


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#### Expansion costs rise as other colocation costs ease

Regarding your organization's colocation data center expenses, in which areas has your organization experienced the greatest unit cost increases over the past 12 months? Choose no more than two.

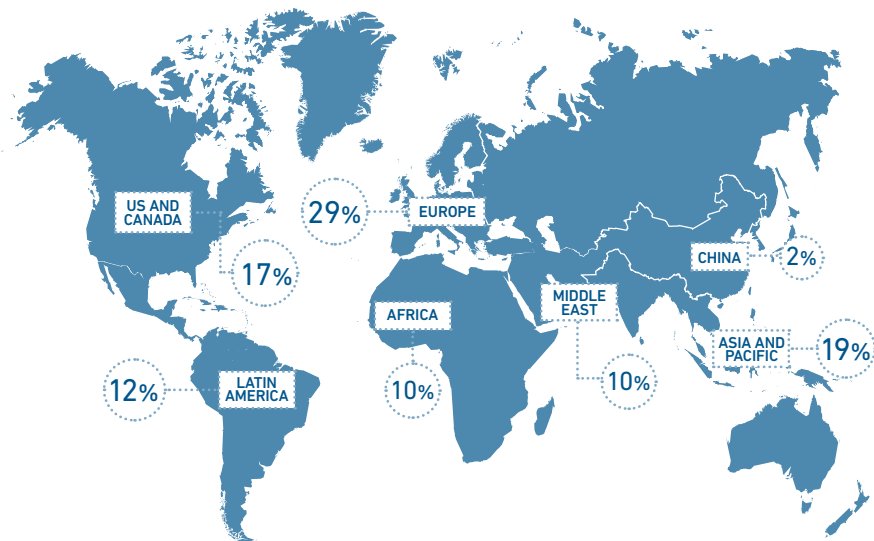


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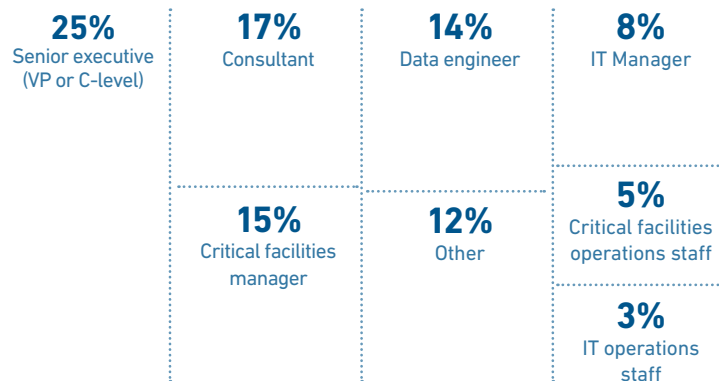
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## Demographics: Uptime Institute Data Center Spending and Supply Chain Survey 2025

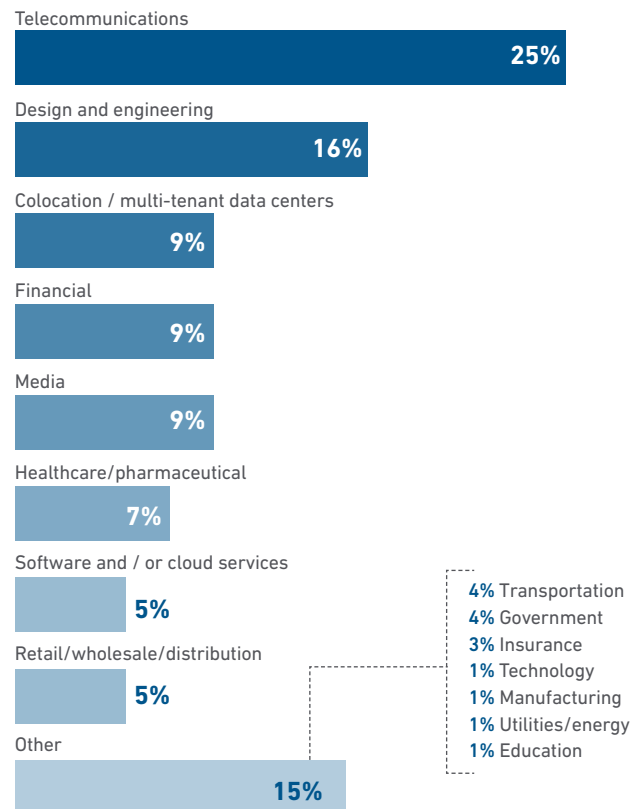
### Company location (n=850)



### Job description (n=630)



### Verticals (n=629)



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### About Uptime Institute

Uptime Institute is the Global Digital Infrastructure Authority. Its Tier Standard is the IT industry's most trusted and adopted global standard for the proper design, construction, and operation of data centers – the backbone of the digital economy. For over 25 years, the company has served as the standard for data center reliability, sustainability, and efficiency, providing customers assurance that their digital infrastructure can perform at a level that is consistent with their business needs across a wide array of operating conditions.

With its data center Tier Standard & Certifications, Management & Operations reviews, broad range of related risk and performance assessments, and accredited educational curriculum completed by over 10,000 data center professionals, Uptime Institute has helped thousands of companies, in over 100 countries to optimize critical IT assets while managing costs, resources, and efficiency.

Uptime Institute is headquartered in New York, NY, with offices in Seattle, London, Sao Paulo, Dubai, Singapore, and Taipei. For more information, please visit [www.uptimeinstitute.com](http://www.uptimeinstitute.com)

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