

Austria Data Center Physical Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

<https://marketpublishers.com/r/A3C4657FBC55EN.html>

Date: July 2024

Pages: 90

Price: US\$ 4,750.00 (Single User License)

ID: A3C4657FBC55EN

Abstracts

The Austria Data Center Physical Security Market size is estimated at USD 13.51 million in 2024, and is expected to reach USD 31.17 million by 2029, growing at a CAGR of 18.20% during the forecast period (2024-2029).

The security measures can be categorized into four layers: perimeter security, facility controls, computer room controls, and cabinet controls. The first layer of data center security is to discourage, detect, and delay any unauthorized personnel entry at the perimeter. In case of any breach in the perimeter monitoring, the second layer of defense restricts access. It is an access control system using card swipes or biometrics.

The third layer of physical security further restricts access through diverse verification methods, including monitoring all restricted areas, deploying entry restrictions such as turnstile, providing VCA, providing biometric access control devices to verify finger and thumbprints, irises, or vascular patterns, and using radio frequency identification. The first three layers ensure entry of only authorized personnel. However, further security measures to restrict access include cabinet locking mechanisms. This layer addresses the fear of an 'insider threat', such as a malicious employee.

Under Construction IT Load Capacity: The upcoming IT load capacity of the French data center market is expected to reach 200 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 0.5 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected

to reach 31,000 units by 2029. Vienna will likely house the maximum number of racks by 2029.

Austria Data Center Physical Security Market Trends

Video Surveillance is Anticipated to be the Largest Segment

Data centers are home to sensitive and vital data, which makes security their highest priority. Data center operators help ensure that security standards and regulations are respected through video surveillance systems, which monitor access, detect unauthorized entry, and maintain compliance.

According to Mark Soto, one-third of data breaches originate from internal users. With the use of video surveillance, it can easily be recorded who entered what area and what they did there. Additionally, the presence of video surveillance can have a strong deterrent effect on attackers. Attackers may have to find a way to bypass video surveillance and abandon their attacks.

In March 2023, Quantum Corporation, a video and unstructured data solutions company, announced version 5.0 of its Unified Surveillance Platform (USP) software, a unified computing and storage platform for mission-critical video surveillance and analytics. This latest software release introduces patented video data reduction technology to record thousands of video streams simultaneously with maximum uptime and fewer servers, minimizing the risk of hardware failure and data center footprint by an 80% reduction.

Further, the growth in the development of new data centers in Austria would trigger market demand. For instance, in October 2021, NTT began construction on a project to expand the size of its data center in Vienna, Austria. The Vienna 1 facility has been expanded from approximately 3,000 square meters (32,300 square feet) to 8,600 square meters. The power plant's capacity was expected to increase by 15.2 MW, and the expansion was planned to be completed in summer 2022.

IT & Telecommunication is Anticipated to be the Fastest Growing Segment

The surging integration of AR technology, cashless payments, and expanding

over-the-top (OTT) platform subscriptions are expected to drive the increase in number of servers in data centers.

Users in Austria see a better 5G experience in urban areas, with an average download speed of 162.3 Mbps. The abovementioned instances suggest the rising use of smartphones in Austria, which constantly increases data. This necessitates a growing amount of storage space to accommodate the uncontrollable flow of data and the need for real-time processing and analysis. Data centers must manage the sheer amount of data. Thus, the requirement for extra servers in data centers in Austria may increase as the number of smartphone users rises.

In 2022, the nation's average data speed was expected to be 63.05 Mbps. 3 (Drei) Austria began rolling out its 4G LTE network in 2014, and 4G availability reached 74.3% with a 27.84 Mbps download speed by 2017. Furthermore, by the end of 2020, 5G was launched in all provincial capitals. Since the launch of both of the services, 4G reached 89.6 Mbps in 2022, and 5G reached 162.4 Mbps by 2022.

The “5G strategy for Austria” document was approved in April 2018, and the service was expected to reach main traffic roads by the end of 2023, followed by nationwide coverage for two years.

More than 650,000 buildings are expected to have high-speed FTTH ("Fibre to the Home") internet connections owing to the EUR 1 billion investment. Such developmental aspects are expected to complement the growth of the broadband network in the region and substantiate the growth of data center facilities in the market further.

Austria Data Center Physical Security Industry Overview

The Austria data center physical security market is moderately competitive and has gained a competitive edge in recent years. In terms of market share, a few major players, such as ABB Ltd, Siemens AG, Cisco Systems Inc., Schneider Electric, and Johnson Controls. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

In April 2023, Schneider Electric launched a new services offer, EcoCare for Modular Data Centers services membership. Members of this innovative service plan benefit from specialized expertise to maximize modular data centers' uptime with 24/7 proactive remote monitoring and condition-based maintenance. Members benefit from exclusive support that includes a dedicated customer success management team, who is their go-to coach, orchestrating remote and on-site services teams, addressing infrastructure and maintenance needs at a system level rather than a fragmented approach for each asset only when problems arise.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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