

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

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Abstracts

The Germany Data Center Physical Security Market size is estimated at USD 75.94 million in 2024, and is expected to reach USD 141.16 million by 2029, growing at a CAGR of 13.20% 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 entry of personnel 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.

IT Load Capacity: The IT load capacity of the German data center market may grow steadily and reach 2.4k MW by 2029.

Raised Floor Space: The country's total raised floor area is expected to reach 11.8k sq. ft by 2029.

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

reach above 580,000 units by 2029. Frankfurt may house the maximum number of racks by 2029.

Planned Submarine Cables: Close to 7 submarine cable systems are connecting Belgium, and many are under construction.

Germany 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 provide them with monitoring of access, detection of unauthorized entry, and maintaining compliance.

Germany's data protection laws, including GDPR, are among the strictest in Europe, ensuring high data security and protection. This is important when working with sensitive AI applications and data. Additionally, hosting our AI systems in Germany allows us to ensure compliance with European Union regulations and reduce legal risks associated with data processing.

Further, the growth in the development of new data centers in Austria would trigger market demand. For instance, in September 2023, Virtus Data Centers planned a new 300 MW campus outside of Berlin, Germany. The company, which is part of STT GDC, unveiled its Wustermark mega campus this week in Brandenburg, west of the capital. The first phase of the campus, located within the Wustermark community, will cover 350,000 square meters (3.7 million square feet) and is expected to be operational by 2026. The company said it will provide 300 MW of input power across its two locations on campus.

In January 2023, CyrusOne acquired a complex in Frankfurt with plans to convert it into a data center campus. Investment group Corum had sold Frankfurt's Europark office complex for EUR 95 million (USD 102.3 million) before approving Cyrus Swan as a buyer. Such investments create opportunities for providers being considered in the market. Thus, the growth in upcoming data centers in the country would drive the demand for the physical security market in the forecast period.

IT & Telecommunication is Anticipated to be the Fastest Growing Segment

The German ICT market is becoming increasingly important thanks to advanced technologies such as cloud computing. Artificial intelligence is also expanding its application in the end-user sector, driving market growth over the next five years. For example, 5G is the new driver of digital transformation in the industry. Cisco announced that it will collaborate with its Axians under the Vinci Energies brand to offer Cisco Private 5G to companies in all industries in Germany and the Netherlands.

Increased infrastructure development, such as the construction of smart cities and data centers, is expected to drive the growth of the ICT market over the next five years. For example, ZTE Corporation signed its 5G innovation cooperation agreement with True Group. This collaboration in the 5G Innovation Center is an outstanding effort towards the comprehensive implementation of 5G-oriented innovative technologies and business cooperation, which will lead to 5G networks, digital services, smart islands, and smart manufacturing. The aim is to develop areas such as research innovation and human resource development.

Like other major global economies, internet connectivity in Germany has increased significantly recently. Social media is becoming popular across the country, and the platform is often used to promote products and services. German railway company Deutsche Bahn is a great example of this, providing customer support through the Twitter platform. Free public Wi-Fi has become increasingly popular, expanding the internet user base in cafes, bookstores, and libraries.

Since last year, Germany has been one of the top countries in the EU for improving internet access. The German public was interested in using the Internet and online services. In 2020, 96% of German households had an internet connection. According to ARD/ZDF, the number of Internet users in Germany increased to 67 million by the end of the previous year. This indicates that the demand for the ICT market is expected to expand significantly. Thus, growth in the overall ICT market would drive the data center market.

Germany Data Center Physical Security Industry Overview

The German 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, Bosch Sicherheitssysteme GmbH, Securitas Technology, 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, which includes a dedicated customer success management team, who become 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

Contents

1 INTRODUCTION

- 1.1 Study Assumption & Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Increasing Demand of Cloud Computing Capabilities Drives the Market Growth
 - 4.2.2 Increase Security Concerns in the Market Drives the Market Growth
- 4.3 Market Restraints
 - 4.3.1 The High Costs Associated with Physical Security Infrastructure.
- 4.4 Value Chain / Supply Chain Analysis
- 4.5 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.5.1 Threat of New Entrants
 - 4.5.2 Bargaining Power of Buyers/Consumers
 - 4.5.3 Bargaining Power of Suppliers
 - 4.5.4 Threat of Substitute Products
 - 4.5.5 Intensity of Competitive Rivalry
- 4.6 Assessment of COVID-19 Impact

5 MARKET SEGMENTATION

- 5.1 By Solution Type
 - 5.1.1 Video Surveillance
 - 5.1.2 Access Control Solutions
 - 5.1.3 Other Solution Types (Mantraps, Fences, and Monitoring Solutions)
- 5.2 By Service Type
 - 5.2.1 Consulting Services
 - 5.2.2 Professional Services
 - 5.2.3 Other Service Types (System Integration Services)
- 5.3 End User

- 5.3.1 IT & Telecommunication
- 5.3.2 BFSI
- 5.3.3 Government
- 5.3.4 Healthcare
- 5.3.5 Other End Users

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Axis Communications AB
 - 6.1.2 ABB Ltd
 - 6.1.3 Securitas Technology
 - 6.1.4 Bosch Sicherheitssysteme GmbH
 - 6.1.5 Johnson Controls.
 - 6.1.6 Honeywell International Inc.
 - 6.1.7 Siemens AG
 - 6.1.8 Schneider Electric
 - 6.1.9 Cisco Systems, Inc.
 - 6.1.10 ASSA ABLOY
 - 6.1.11 AMAG Technology, Inc.
 - 6.1.12 Dahua Technology Co., Ltd

7 INVESTMENT ANALYSIS

8 MARKET OPPORTUNITIES AND FUTURE TRENDS

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