

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

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Abstracts

The India Data Center Physical Security Market size is estimated at USD 63.36 million in 2024, and is expected to reach USD 143.54 million by 2029, growing at a CAGR of 17.77% during the forecast period (2024-2029).

Key Highlights

Security measures can be categorized into computer room controls, facility controls, perimeter security, and cabinet controls. The first layer of data center security detects, delays, and discourages unauthorized personnel entry at the perimeter. Upon breach of the perimeter monitoring, the second layer of defense withholds access. It is an access control system which uses card swipes or biometrics. The third layer further restricts access through diverse verification methods by monitoring all restricted areas and deploying entry restrictions such as turnstile with VCA, biometric access control devices for thumbprints, irises, or vascular patterns, and using radio frequency identification. The initial three layers ensure only authorized entry. However, additional security to restrict access comprises cabinet locking mechanisms. It addresses the fear of an 'insider threat,' such as a malicious employee.

The upcoming IT load capacity in the region is expected to reach 4,700 MW by 2029, which is projected to positively impact the demand for data center racks during the forecast period.

The construction of raised floor area for data centers in the region is expected to reach 14.2 million sq. ft by 2029 for under construction raised floor space.

The region's total number of racks to be installed is expected to reach 710,000 units by 2029.

Currently, 15 submarine cable projects are under construction in the region. One such submarine cable, estimated to start service in 2024, is India Europe Xpress (IEX), stretching over 9775 kilometers with landing points in Mumbai.

India Data Center Physical Security Market Trends

The Video Surveillance Segment Holds a Significant Share

Sensitive and important data is stored in data centers, so security is a top priority. Data center operators use video surveillance systems to ensure security standards and regulations are met. This allows you to monitor access, detect unauthorized access, and maintain compliance.

Video surveillance is a cost-effective solution for preventing physical attacks and unauthorized access to critical data, reducing the risk of data breaches and leaks. Cameras are installed at entrances and exits, allowing security personnel to easily identify and track the source of unauthorized access or damage to servers.

The Indian banking sector is on an upward trajectory supported by strong economic growth, rising disposable income, rising consumption, and easy access to credit. Digital payment methods have been rapidly increasing in recent years. Banks have a high need for data centers to perform activities such as banking, trading, and financial compliance. It is important to follow regulations to ensure data protection and safety. Such instances in the market lead to increasing demand for physical data center security players in the country.

Additionally, factors such as increased connectivity and online shopping are likely to contribute to increased data generation and processing power. As the country's internet penetration rate increased, the number of smartphone users also increased in 2022. This represents an increase in data centers and the associated demand for video surveillance to prevent malicious or erroneous operations within the data center and provide evidence to identify those responsible in the event of an incident.

Major players in the market are focusing on improving data center physical security solutions to meet market demands. In March 2023, Honeywell installed 7,000 of its AI video cameras in Bangalore as part of its Safe City project. The "Safe City" project also

includes data centers.

The IT and Telecommunication Segment Holds a Major Share

India is among the 'major players in the Asia-Pacific data center sector. Data centers are critical for national security, internet infrastructure, and economic output. In India, data center infrastructure is growing exponentially, with a growing preference for the cloud and increased data consumption and generation by over half a billion digital users.

Businesses have been migrating to the cloud recently as they shift into more flexible digital workplaces to deal with the increase in online demand and remote working. Although the cloud is the foundation of digital transformation, cloud services are built on data centers. Due to this, the cloud migration of businesses is driving the construction of more data centers in India and increasing the need for data center security in the country.

The Indian government is dedicated to establishing an enabling political and regulatory environment to facilitate the continued expansion of key technologies such as 5G, the Internet of Things (IoT), artificial intelligence (AI), cloud computing, blockchain, and machine-to-machine (M2M) communications. This commitment is fueled by the remarkable growth of the information and communication technology (ICT) sector in India and its substantial contributions to the country's socio-economic progress.

The Ministry of MSMEs indicated that as of March 2022, there were over 7.9 million MSMEs in India, while as of January 2021, there were about 650 registered, which shows the number of MSMEs in India has changed. India increased rapidly. This makes it a very potential market for IT implementations.

The government must formulate and implement the right policies to harness the potential of the ICT sector, making it a prominent driver of India's economic growth. Advancements in these technological domains are poised to propel the research and development market within the region, further bolstering India's position as a hub for innovation and technological progress. The increase in data consumption will thereby constitute an increase in the construction of more data centers in the country, thereby increasing the need for data center security in the country.

India Data Center Physical Security Industry Overview

The market is highly fragmented due to players like Axis Communications AB, ABB Ltd, and Bosch Sicherheitssysteme GmbH, which play a vital role in upscaling the capabilities of enterprises. Market orientation leads to a highly competitive environment. The biggest retail and wholesale data center market companies have further tried to make their system secure and safe from thefts. There has been a wave of consolidation in the secondary markets as smaller players seek to scale to compete and big players scale their products in the market. For instance,

In March 2023, Honeywell installed 7000 AI video cameras as part of Bengaluru's Safe City project, which also includes data centers.

In October 2023, Zwipe partnered with Schneider Electric's Security Solutions Group. Schneider Electric plans to introduce the Zwipe Access fingerprint-scanning smart card to its clientele. This card will be integrated with Schneider Electric's Continuum and Security Expert platforms, serving a client base from sectors including airports, transportation, healthcare, and data centers.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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