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

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Abstracts

The Indonesia Data Center Physical Security Market size is estimated at USD 32.57 million in 2024, and is expected to reach USD 71.93 million by 2029, growing at a CAGR of 17.10% 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 over 1,400 MW by 2029 for under construction IT load capacity.

The construction of raised floor area for data centers in the country is expected to reach 4.3 million sq. ft by 2029 for under construction raised floor space.

The country's total number of racks to be installed is expected to reach over 218,000

units by 2029.

Currently, 15 submarine cable projects are under construction in the country. One such submarine cable, estimated to start service in 2024, is Apricot, stretching over 11972 kilometers with landing points Batam and Tanjung Pakis for planned submarine cables.

Indonesia 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.

Data protection laws set strict requirements for data center operators. Video surveillance can help maintain compliance by improving physical security measures.

Indonesia's banking sector has one of the highest net interest margins (NIM) in the world and is currently one of the most profitable sectors among ASEAN countries. Indonesia's GDP for financial and insurance activities is expected to grow by approximately 1.93% in 2022. 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.

The IT and Telecommunication Segment Holds a Major Share

The telecommunication sector will maintain its dominance due to the growing adoption of 5G networks. The 5G mobile data speed is expected to increase significantly,

reaching 259.3 Mbps by 2029. This suggests increasing data traffic, demand for data centers in the market, and the need for data center security in the country.

Companies increasingly rely on data centers to manage their databases and storage efficiently, as they generate significant amounts of data every day. Therefore, the main driving factor for data center rack usage is the increased deployment of fully configured data centers. The market's growth is also being influenced by the growing demand for IT services and investments made by large companies.

Indonesia's digital economy is expected to add USD 150 billion to GDP by 2025. To achieve this goal, the Indonesian government is undertaking large-scale infrastructure development. As part of the digital transformation, the government has launched several national initiatives, such as the 100 Smart Cities Movement, e-Smart IKM, and Go Digital Vision 2020.

Indonesia's digital economy is growing rapidly, owing to the increasing adoption of digitalization and well-known online marketplaces such as Tokopedia and GoJek. Enabling three stages of future cities: smart cities (comfortable, livable, and safe), greener cities (climate change and disaster resistant), and competitive, technology-based smart cities. The Indonesian government has launched a smart city. City Vision Indonesia 2015-2045. Thus, the demand for data center facilities is expected to increase in the coming years, and the need for data center security in the country is also increasing.

Indonesia 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 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,

February 2024: In the latest release of the Axis operating system, AXIS OS, and Axis Communications AB, they were announced that more than 200 network devices, including cameras, intercoms, and 11.8 audio speakers, are supported by the IEEE

MAC 802.1sec security standard. Demonstrating the company's continued commitment to device and data security, Axis has become the first manufacturer of physical safety products supporting MACsec Media Access Control Security.

August 2023: Securitas signed an expanded 5-year agreement to provide data center security for Microsoft in 31 countries, solidifying a strong relationship. The global agreement includes risk management, comprehensive security technology as a system integrator, specialized safety, security resources, guarding services, and digital interfaces. Securitas ensures that the data center's physical security program remains innovative, robust, and effective. This demonstrates stability as a collaborator, assisting in navigating the challenges of Microsoft's expanding business.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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