

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

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Abstracts

The Italy Data Center Physical Security Market size is estimated at USD 16.20 million in 2024, and is expected to reach USD 32.20 million by 2029, growing at a CAGR of 14.70% during the forecast period (2024-2029).

Security measures can be categorized into four layers, i.e., perimeter security, facility controls, computer room controls, and cabinet controls. The first layer of data center security discourages, detects, and delays any unauthorized entry of personnel at the perimeter. In case of any infringement in the perimeter monitoring, the second layer of defense denies access. It is an access control system utilizing card swipes or biometrics.

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

Key Highlights

IT Load Capacity: The IT load capacity of the Italian data center market may grow steadily and reach above 800 MW by 2029.

Raised Floor Space: The country's total raised floor area is expected to reach 5.4

million sq. ft by 2029.

Installed Racks: The country's total number of installed racks is expected to reach 260,000 units by 2029. Greater Milan may house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 32 submarine cable systems connecting Sweden, and many are under construction.

Italy Data Center Physical Security Market Trends

Video Surveillance is Anticipated to be the Largest Segment in the Market Studied

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.

With the help of video surveillance, consumers can easily record movements around the area. Additionally, the presence of video surveillance can have a deterrent effect on attackers. Attackers may have to find a way to bypass video surveillance and abandon their attacks.

The growth in the development of new data centers in Austria would trigger market demand. For instance, in September 2023, a consortium of Italian companies wanted to build a data center in a Dolomite mine. The University of Trento, in collaboration with the construction company Covi Costolzone, the IT services company Deda Group, the sustainable healthcare provider GPI, and the holding company Istituto Atesino di Sviluppo (ISA), will develop the San Romedio mine in Trento. The company plans to develop a data center in Italy.

Similarly, in September 2023, Digital Realty planned to expand into Italy and acquired land in Rome's capital. The company announced its expansion into the Italian market following the acquisition of real estate in Rome and preliminary development plans. Thus, the growth in upcoming data centers in the country would drive the demand for the physical security market during the forecast period.

IT and Telecommunication is Anticipated to be the Fastest Growing Segment

The ICT industry includes both the IT market and the telecommunications market. IT investments are increasing, and ICT market demand is expected to increase significantly over the next five years. For example, TIM Group (Telecom Italia SpA) works with Cisco to provide private companies and government agencies with cloud services. The growth of the Italian ICT industry is accelerating significantly due to the increasing need to consider and implement investments in cloud technologies.

The government has committed to developing the ICT industry and bringing new growth opportunities to the ICT market. For example, Italy's National Plan for Recovery and Resilience is expected to positively stimulate and influence the ICT market over 2021-2024. Italy is one of the leaders in the digital market. From 2022 to 2024, the key technological drivers will continue to be cloud computing, big data, artificial intelligence (AI), Internet of Things (IoT), and cybersecurity.

Cyberattacks are expected to continue to increase over the next five years. Advances in IT operations protect the ICT market from cyberattacks. For example, the Italian company Google has developed a hacking tool to spy on Apple Inc. and Android smartphones in Italy and Kazakhstan. Google reports that the website lists European law enforcement agencies as customers and has developed tools to spy on private communications and contacts on targeted devices.

The transition to 5G is still progressing in the country due to the rollout of new networks and increasing demand for high-speed connectivity services. For example, Telecom Italia (TIM) won a government tender to implement its 5G network worth USD 817.54 million. Such government investments will provide new growth opportunities for major players in the ICT market.

Growth in the telecommunications industry is primarily due to population growth and increased adoption of broadband services in the country. According to the Ookla Speedtest Global Index, Italy ranked 65th with an average fixed broadband download speed of 60.38 Mbps in December 2023. The penetration of fixed broadband services is increasing significantly, and the demand for telecommunications services is rising.

Italy Data Center Physical Security Industry Overview

The Italian 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, 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 service offer, EcoCare for Modular Data Centers. 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 service teams. It addresses 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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