

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

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Abstracts

The Norway Data Center Physical Security Market size is estimated at USD 18.26 million in 2024, and is expected to reach USD 37.70 million by 2029, growing at a CAGR of 15.60% 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 upcoming IT load capacity of the Norway data center market is expected to reach more than 600 MW by 2029.

Raised Floor Space: The country's construction of raised floor area is expected to reach

above 3.5 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach above 174,000 units by 2029. Oslo and Vestland are expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 15 submarine cable systems connecting Ireland, and many are under construction.

Norway 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.

With the help of video surveillance, consumers can easily record 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.

Furthermore, the growth in the development of new data centers in Austria would trigger market demand. For instance, in October 2023, Green Mountain announced the construction of a large new data center campus in Norway. The site is located in Kalberg, about 20 kilometers from Stavanger in southwestern Norway. The technology customer demands that the first construction phase be completed by January 2025 at the latest and the last construction phase be completed in 2027.

In September 2022, Bulk Data Centers, the leading Nordic provider of highly scalable, highly connected, and sustainable data centers, announced a series of expansion projects at its data center locations in Norway. The investment focus is on ensuring long-term availability of power and land and delivering a highly connected and scalable site powered by 100% renewable energy. Thus, the growth in upcoming data centers in the country would drive the demand for the data center physical security market during the forecast period.

IT and Telecommunication is Anticipated to be the Fastest Growing Segment

Information and communication technology (ICT) is a rapidly growing industry that is becoming increasingly important to Norwegian trade. ICT businesses include everything from labor-intensive companies that focus on home-grown products to selling consulting services. As this sector expands and new industries and segments of society start using ICT products, it is expected to play a larger role in economic growth in the coming years.

Norway has a number of well-established ICT environments. ICT companies are typically knowledge-intensive, and most are small and medium-sized enterprises. However, several large players in the telecommunications and satellite communications sector also exist. The telecommunications industry makes up the bulk of Norway's ICT industry. Norway's professional telecommunications community adheres to the highest international standards. Telenor, by far and away the country's largest ICT company, is the predominant telecommunications operator, with an 80% market share in traditional telephony (in terms of number of traffic minutes).

Furthermore, about 86% of users accessed the internet every day using their smartphones in Norway in 2021, compared to about 85% in 2018 and 74% in 2016. As of 2021, the users aged between 16 and 19 comprised about 99%, followed by 96% belonging to the age group of 20-24 and 25 to 44, highlighting how the young and mature audience both contribute significantly to the overall smartphone adoption.

Data consumption through smartphones increased over the historical period in Norway. A major data consumption increase was observed around 2020 as the number of smart cities in the country increased from 6 to 14 within two years since 2018. Since about 98.9% of the energy consumed in the country is sourced from renewable resources, it may lead to more smart cities, paving the way for the broader implementation of IoT and other smart technologies. The increased usage of smartphones for app-based remote control of these smart systems may contribute heavily to data consumption.

Norway Data Center Physical Security Industry Overview

The Norwegian 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 services 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

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