

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

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Abstracts

The Philippines Data Center Physical Security Market size is estimated at USD 26.34 million in 2024, and is expected to reach USD 64.84 million by 2029, growing at a CAGR of 19.74% during the forecast period (2024-2029).

The 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.

Key Highlights

Under Construction IT Load Capacity: The upcoming IT load capacity of the Philippines data center market is expected to reach 730 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 2620 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach

130K units by 2029. NCR (Metro Manila) is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 20 submarine cable systems connecting the Philippines, and many are under construction. One such submarine cable that is estimated to start service in 2024 is SEA-H2X, which stretches over 5,000 kilometers with landing points from La Union, Philippines.

Philippines Data Center Physical Security Market Trends

Video Surveillance Segment Holds Significant Share

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

Video surveillance allows operators to monitor all ongoing issues and events within their data center in real time and provides up-to-date information to customers anytime, anywhere.

The Philippines is the only country in the world where users spend an average of 10 hours a day on the phone. As the telecom network developed and improved its facilities, users could attain good mobile data speeds on their smartphones, which increased their functionality and experience. Online games on mobile have improved their quality, and the events organized by game developers have increased the demand for smartphones. Moreover, phones with higher processors, better displays, and larger batteries are available at a budget price. 74% of the users prefer mobile gaming over PC and console gaming. Smartphones generate large amounts of data that require real-time processing and analysis. Data centers need to manage huge amounts of data so they can prevent malicious or erroneous operations within the data center and provide evidence to identify those responsible in the event of an incident. Thus, the need for video surveillance is increasing.

Philippine consumers now have extensive access to 4G and 5G services. 5G network services were launched in the second half of 2021, and customer adoption increased in the first quarter of 2022. In addition, factors such as increased connectivity and online shopping are also expected to contribute to increased data generation and processing facilities. As the country's internet penetration rate increases, smartphone users are

also expected to increase. 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.

IT & Telecommunication Segment Holds Major Share

The ICT sector includes both IT and telecommunications markets. IT investments are rising in the country, and the demand for the ICT market is expected to grow significantly over the next five years. According to the Department of International Trade, Philippine software service sales are expected to reach a value of USD 95 million by 2025.

Given the increasing digital adoption, Alibaba Cloud Intelligence intends to invest more in the Philippines after opening a data center. Allen Guo, the country manager for the giant technology firm, said at a press conference in Makati that the company was considering expanding the capacity of its data center to accommodate the growing use of digital platforms. Around 88% of the companies in the Philippines use cloud-based solutions. The growing demand for analytics and software for business purposes by the public and private industries is expected to boost the growth of the segment.

The growing demand for analytics and software for business purposes by the public and private industries is expected to boost the growth of the cloud segment.

The growth in the telecom segment considerably increased after the COVID-19 pandemic, with remote work and online study options being adopted as the new normal. Furthermore, streaming services, online gaming, and shopping contributed to the considerable increase in the demand for data centers from the telecom industry. The Department of Information and Communications Technology introduced a new policy called the Common Tower Policy, which is expected to improve the quality of mobile networks further in the country.

In recent years, the market for cloud gaming has grown significantly, with more and more players opting to use cloud-based solutions instead of traditional video games. For instance, the first 5G e-sports hub in the Philippines was launched by Smart Communications, marking the occasion of the first cross-platform gaming exhibition match to be held on the cloud, a nationwide first. All these instances increase the need

for data centers in the country. The increase in the growth of data centers enables the need for data center security in the country.

Philippines Data Center Physical Security Industry Overview

The market is highly fragmented due to the presence of major players like Axis Communications AB, ABB Ltd, and Bosch Sicherheitssysteme GmbH, among others, 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 are trying to make their system more 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 February 2024, in the latest release of the Axis operating system, AXIS OS, Axis Communications AB 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 in the Philippines.

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