

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

<https://marketpublishers.com/r/S97BFF27A4CBEN.html>

Date: July 2024

Pages: 90

Price: US\$ 4,750.00 (Single User License)

ID: S97BFF27A4CBEN

## Abstracts

The Singapore Data Center Physical Security Market size is estimated at USD 28.55 million in 2024, and is expected to reach USD 64.01 million by 2029, growing at a CAGR of 17.52% 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 Singaporean data center market is expected to reach 1000 MW by 2029.

**Under Construction Raised Floor Space:** The country's construction of raised floor area is expected to increase to 3.3 million sq. ft by 2029.

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

more than 160K units by 2029. East Singapore is expected to house the maximum number of racks by 2029.

**Planned Submarine Cables:** There are close to 39 submarine cable systems connecting Singapore, and many are under construction. One such submarine cable that is estimated to start service in 2024 is Bifrost, which stretches over 19,888 kilometers with landing points from Changi North, Singapore, and Changi South, Singapore.

## Singapore 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 operators 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.

The population of Singapore is 100% urbanized, with 8.7 million mobile connections, accounting for 147% of the population. This data suggests that every citizen in the country owns more than one mobile device. The increased use of connected devices and smart homes has also increased the demand for digital data and network traffic. This makes Singapore one of the regional pioneers in the mobile commerce field. This means an increase in data consumption across data centers and, in turn, an increase in the domestic video surveillance market.

The country's 5G network is booming and is expected to reach 946.04 Mbps by 2029. 5G networks and services are expected to form the backbone of growth in the telecommunications sector in the coming years as service providers seek new ways to target customers in an already saturated market. The growth of the telecommunications industry is increasing the size of data centers, thereby increasing the need for video surveillance. Video surveillance has a powerful deterrent effect, reducing the likelihood of physical attacks and unauthorized access to critical data.

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 increases, the number of smartphone users is 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 Singaporean government is pivotal in stimulating demand and the utilization of technology and telecommunications across the country. The government is launching forward-thinking projects like the Smart Nation Initiative, Digital Economy Framework, Digital Government Blueprint, and Industrial Transformation Map.

Singapore continues to roll out 5G. 5G networks and services are expected to be the cornerstone of the telecom industry's development over the next few years as service providers look for new ways to attract customers to the market. Singapore is expected to expand standalone 5G coverage to seaports such as anchorages, fairways, terminals, and wharves by mid-2025 to facilitate 5G deployment in shipping.

In August 2022, the Infocomm Media Development Authority (IMDA) unveiled three more 5G projects to help Singapore use the fifth-generation mobile network in different areas. The projects involve using 5G in augmented reality (AR), health technology, and the maritime sector. Furthermore, in July 2022, Singtel confirmed to have achieved more than 95% standalone 5G coverage across Singapore, three years ahead of the regulatory target of end-2025, covering more than 1,300 outdoor locations. This would increase the demand for bandwidth due to increased data traffic, further driving the data center market and increasing the need for data center security in the country.

The Government Technology Agency of Singapore primarily focuses on the digital transformation of the public sector using advanced data and communication tech to improve the daily lives of Singaporeans. Plans such as the Smart Nation Initiative, the Digital Economy Framework, the Digital Government Blueprint, and the Industrial Transformation Map (ITM) continue to drive the demand for technology and telecommunications adoption across the country.

Furthermore, Chinese cloud service provider Alibaba Cloud launched its cloud computer in Singapore, eliminating the need for powerful desktop hardware to perform compute-intensive tasks. All connectivity and storage will be managed by Alibaba Cloud, which is targeting organizations involved in medical research, financial modeling, and oil and gas

simulations, among other use cases. Such instances are expected to increase the demand for the cloud industry in the market.

## Singapore Data Center Physical Security Industry Overview

The market is highly fragmented with 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 have been 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,

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, data centers, and more.

August 2023: Securitas signed an expanded five-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 and 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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