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

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Abstracts

The Thailand Data Center Physical Security Market size is estimated at USD 19.53 million in 2024, and is expected to reach USD 48.28 million by 2029, growing at a CAGR of 19.84% 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 Thai data center market is expected to reach more than 270 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 6 million sq. ft by 2029.

Planned Submarine Cables: There are close to 12 submarine cable systems connecting

Thailand, and many are under construction. One such submarine cable is Southeast Asia-Japan Cable 2 (SJC2), which stretches over 10,500 kilometers with landing points from Songkhla, Thailand. It was estimated to start service in 2023.

Thailand 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 solutions help mitigate threats and provide operational insight for enterprises and multi-tenant data centers. Equipped with advanced AI and analytics, these security cameras reduce costs by reducing the number of cameras and live patrols for easier monitoring.

As per Digital 2022 "Thailand," Thailand has a high level of digital readiness, with high penetration rates of internet usage, social media usage, mobile connectivity, online shopping, and digital payments. The increase in domestic e-commerce retailers is also driving sales growth. Cross-border spending accounts for half (50%) of Thailand's e-commerce spending. Thailand's mobile commerce market is already the country's dominant e-commerce sales channel, accounting for 52% of all online shopping transactions, and it is valued at USD 13.6 billion. This makes the country one of the pioneers of mobile commerce in the region. This means an increase in data consumption across data centers and, in turn, an increase in the domestic video surveillance market.

In Thailand, more than 85% of the population was expected to have 5G coverage by the end of 2022. With newer partnerships and developments, the usage of 5G in smartphones is increasing. For instance, in July 2022, Ericsson and the King Mongkut University of Technology Thonburi (KMUTT) announced a partnership to support Thai students in building 5G ICT skills for the future. As the pioneer in launching 5G commercial service in Southeast Asia, Thailand is well positioned to develop its ambitious Industry 4.0 wireless ecosystem to enhance the consumer mobile experience and support the digitization of its manufacturing, energy, and healthcare industries. The increase in the telecom industry increases data centers and the need for video surveillance, which also acts as a powerful deterrent, reducing the chances of physical

attacks and unauthorized access to critical data.

IT & Telecommunication Segment Holds Major Share

The Thai government is working with IT companies to develop its digital infrastructure further. For example, the governments of Thailand and Vietnam made an MoU on IT infrastructure, cloud computing, social network management, digital transformation, and the development of the digital economy.

ICT market leaders are planning to roll out 5G networks in both urban and rural areas. For instance, Ericsson is working with King Mongkut's University of Technology Thonburi (KMUTT) to help Thai students build 5G ICT skills for the future.

Government investments aimed at fostering the advancement of various technologies, including 5G, artificial intelligence (AI), Internet of Things (IoT), machine learning, and big data, are on the rise. The advent of digital transformation is anticipated to fuel the expansion of the ICT market. To illustrate, AWS is actively dedicated to bolstering the Thai government's digital initiative, "Thailand 4.0." Consequently, the burgeoning ICT sector is poised to drive up demand for data center facilities, thereby necessitating an increase in data center security in the country.

In the next five years, Thailand is expected to rapidly adopt hybrid cloud services, with 67% of respondents agreeing to the adoption plan. Digital media, financial services, retail, and manufacturing are the main cloud customers in the country, as Thai businesses planned to set out an effective cloud migration strategy to gain the benefits of digital transformation. In 2020, Thailand scored 20.1 for cloud regulation and was ranked 11th out of Asia-Pacific countries in this category.

In the context of investment under new Thai regulations, in May 2022, Alibaba Cloud, the digital technology and intellectual backbone of Alibaba Group, launched its first data center in Thailand to bolster local businesses' digital innovation capabilities.

The telecommunications sector in Thailand has a customer base of over 60 million, making it the major telecommunications sector in Southeast Asia, according to an industry expert. In addition, Google predicts that Thailand will be the second-largest internet economy, worth USD 50 billion by 2025. There are three large players in the market, including AIS, TrueMove, and DTAC. The fourth operator, National Telecom

(NT), was formed in January 2021 after the merger of two state-owned telecom operators (CAT and TOT). Rollouts of its network to enhance quality and speed, along with investment in 5G technology, will be key areas of development.

Thailand 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. Big players are scaling their products in the market. For instance,

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 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.

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.

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