

Global Mainframe Security Assessment Market 2026 by Company, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GA261B8CE13EEN.html>

Date: July 2026

Pages: 146

Price: US\$ 3,480.00 (Single User License)

ID: GA261B8CE13EEN

Abstracts

According to our (Global Info Research) latest study, the global Mainframe Security Assessment market size was valued at US\$ 451 million in 2025 and is forecast to a readjusted size of US\$ 640 million by 2032 with a CAGR of 5.0% during review period.

Mainframe Security Assessment refer to specialized software tools, platform modules, and professional services designed to evaluate the security posture, control effectiveness, system integrity, access governance, audit readiness, and regulatory compliance of IBM Z, z/OS, and related mainframe environments.

Mainframe Security Assessment is best understood as a specialized security and compliance discipline embedded in critical infrastructure operations rather than a broad, horizontal cybersecurity product category. Its proper market boundary is centered on IBM Z, z/OS, RACF, ACF2, Top Secret, SMF, CICS, DB2, IMS, JES2, TSO, USS, privileged access, dataset permissions, system integrity, and audit evidence. It should not be generalized into cloud workload protection, generic server security, or ordinary penetration testing. Demand is usually triggered by regulatory audits, internal control reviews, security remediation programs, outsourcing transitions, mainframe modernization projects, mergers, major access-control redesigns, and high-risk changes to core transaction environments. This makes the market relatively small in absolute size but strategically important for banks, insurers, payment networks, governments, airlines, telecom operators, retailers, and mainframe hosting providers.

From a supply-side perspective, the industry is structured in several layers. IBM, Broadcom, BMC, and Rocket Software form the first layer because they combine mainframe-native software, access-control infrastructure, compliance modules, audit

tooling, and large enterprise installed bases. Specialist vendors and service providers such as Vanguard Integrity Professionals, Vertali, NetSPI, Beta Systems, Software Diversified Services, ASPG, and several regional RACF or z/OS specialists form the second layer, typically competing on technical depth, independence, penetration-testing expertise, or automated compliance capabilities. Global IT services firms such as Deloitte, TCS, Kyndryl, and DXC participate mainly through advisory, managed services, and large enterprise transformation programs. The broad vendor pool is larger than the core formal list because many cybersecurity firms, SIEM vendors, and mainframe modernization providers touch the mainframe environment but lack explicit, repeatable, mainframe-specific assessment offerings.

From a demand perspective, regulation and operational resilience are the most important growth drivers. The EU's DORA regime has increased attention to ICT risk management, digital operational resilience testing, incident handling, and third-party risk in the financial sector. PCI DSS v4.0.1 continues to shape payment and cardholder-data controls, while DISA STIG and related security readiness reviews remain influential in government and defense environments. At the same time, mainframe estates are increasingly connected to APIs, hybrid cloud platforms, distributed applications, SIEM systems, and DevSecOps workflows. This changes the threat model from a historically isolated mainframe perimeter toward a more exposed, integrated, and continuously monitored control environment.

From a product and technology roadmap perspective, the market is moving from periodic manual audits toward automated scanning, continuous compliance, SIEM-integrated evidence collection, policy-driven control validation, and mainframe-specific penetration testing. IBM zSecure and Z Security and Compliance Center, Broadcom's ACF2, Top Secret and Auditor for z/OS, BMC AMI Security, Rocket's security services and z/Assure-related capabilities, and specialist RACF / STIG tools represent the current core supply base. The long-term opportunity will not come from rapid growth in new mainframe installations, but from the continued criticality of existing workloads, a shortage of deep z/OS security skills, stricter regulatory expectations, and the need to prove cyber resilience in the most sensitive transaction systems.

This report is a detailed and comprehensive analysis for global Mainframe Security Assessment market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share

estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Mainframe Security Assessment market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Mainframe Security Assessment market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Mainframe Security Assessment market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Mainframe Security Assessment market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Mainframe Security Assessment

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Mainframe Security Assessment market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include IBM, Broadcom Inc., BMC Software, Rocket Software, Vanguard Integrity Professionals, Deloitte, TCS, NetSPI, Vertali, Beta Systems Software AG, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market segmentation

Mainframe Security Assessment market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Assessment and Compliance Audit Software

Vulnerability Scanning and Integrity Tools

Others

Market segment by Security Control Domain

External Security Manager Review

Privileged Access and Identity Review

Market segment by Assessment Methodology

Baseline Configuration Review

Automated Scanning

Manual Technical Audit

Market segment by Application

Banking and Capital Markets

Insurance

Government and Defense

Others

Market segment by players, this report covers

IBM

Broadcom Inc.

BMC Software

Rocket Software

Vanguard Integrity Professionals

Deloitte

TCS

NetSPI

Vertali

Beta Systems Software AG

SDS

ASPG

Kyndryl

DXC Technology

Qualys

Precisely

Enterprise IT Security GmbH

atsec information security

Venustech Group Inc.

Qi An Xin Technology Group Inc.

MindBytes GmbH

RSH Consulting

Longpela Expertise

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Mainframe Security Assessment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Mainframe Security Assessment, with revenue, gross margin, and global market share of Mainframe Security Assessment from 2021 to 2026.

Chapter 3, the Mainframe Security Assessment competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with

consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Mainframe Security Assessment market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Mainframe Security Assessment.

Chapter 13, to describe Mainframe Security Assessment research findings and conclusion.

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