

Global Mainframe Security Assessment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Mainframe Security Assessment market size is expected to reach \$ 640 million by 2032, rising at a market growth of 5.0% CAGR during the forecast period (2026-2032).

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 studies the global Mainframe Security Assessment demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Mainframe Security Assessment, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Mainframe Security Assessment

that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Mainframe Security Assessment total market, 2021-2032, (USD Million)

Global Mainframe Security Assessment total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Mainframe Security Assessment total market, key domestic companies, and share, (USD Million)

Global Mainframe Security Assessment revenue by player, revenue and market share 2021-2026, (USD Million)

Global Mainframe Security Assessment total market by Type, CAGR, 2021-2032, (USD Million)

Global Mainframe Security Assessment total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Mainframe Security Assessment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Mainframe Security Assessment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mainframe Security Assessment Market, Segmentation by Type:

Assessment and Compliance Audit Software

Vulnerability Scanning and Integrity Tools

Others

Global Mainframe Security Assessment Market, Segmentation by Security Control Domain:

External Security Manager Review

Privileged Access and Identity Review

Global Mainframe Security Assessment Market, Segmentation by Assessment Methodology:

Baseline Configuration Review

Automated Scanning

Manual Technical Audit

Global Mainframe Security Assessment Market, Segmentation by Application:

Banking and Capital Markets

Insurance

Government and Defense

Others

Companies Profiled:

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

Key Questions Answered

1. How big is the global Mainframe Security Assessment market?
2. What is the demand of the global Mainframe Security Assessment market?
3. What is the year over year growth of the global Mainframe Security Assessment market?
4. What is the total value of the global Mainframe Security Assessment market?
5. Who are the Major Players in the global Mainframe Security Assessment market?
6. What are the growth factors driving the market demand?

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