

Global Mainframe Security Assessment Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Mainframe Security Assessment market size is predicted to grow from US\$ 429 million in 2025 to US\$ 619 million in 2032; it is expected to grow at a CAGR of 5.4% from 2026 to 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.

LPI (LP Information)'s newest research report, the 'Mainframe Security Assessment Industry Forecast' looks at past sales and reviews total world Mainframe Security Assessment sales in 2025, providing a comprehensive analysis by region and market sector of projected Mainframe Security Assessment sales for 2026 through 2032. With Mainframe Security Assessment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Mainframe Security Assessment industry.

This Insight Report provides a comprehensive analysis of the global Mainframe Security Assessment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Mainframe Security Assessment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Mainframe Security Assessment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Mainframe Security Assessment and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Mainframe Security Assessment.

This report presents a comprehensive overview, market shares, and growth opportunities of Mainframe Security Assessment market by product type, application, key players and key regions and countries.

Segmentation by Type:

Assessment and Compliance Audit Software

Vulnerability Scanning and Integrity Tools

Others

Segmentation by Security Control Domain:

External Security Manager Review

Privileged Access and Identity Review

Segmentation by Assessment Methodology:

Baseline Configuration Review

Automated Scanning

Manual Technical Audit

Segmentation by Application:

Banking and Capital Markets

Insurance

Government and Defense

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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

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