

Global Mainframe Modernization Market Size Study & Forecast, by Offering (Software and Services), Organization Size (Large Enterprises and SMEs), Vertical (BFSI, Telecom, IT & ITES, Retail & Ecommerce, Government and Others) and Regional Forecasts 2025-2035

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Abstracts

The Global Mainframe Modernization Market is valued at approximately USD 7.65 billion in 2024 and is anticipated to grow at a CAGR of 9.70% over the forecast period 2025-2035. Mainframe modernization refers to the process of transforming legacy systems—often deeply embedded in critical business functions—into agile, cloud-ready, and cost-efficient architectures. With organizations under increasing pressure to drive innovation while ensuring reliability and security, the shift away from aging mainframes has become a strategic imperative. Rising operational costs, skill shortages in legacy system management, and the ever-growing demand for seamless customer experiences are driving enterprises to adopt modernization strategies that range from re-platforming and application refactoring to full-scale cloud migration.

The intensifying pace of digital transformation, especially across highly regulated industries, has catalyzed the momentum for mainframe modernization. Enterprises are under constant pressure to shorten product lifecycles, secure real-time data accessibility, and improve integration with emerging technologies such as AI, analytics, and blockchain. This transition is further fueled by the rising adoption of hybrid and multi-cloud strategies, which allow organizations to optimize workloads and reduce dependency on monolithic legacy systems. However, the journey to modernization is not without hurdles—high initial investment costs, risks of data migration, and the complexity of transforming mission-critical systems present challenges. Nonetheless,

the potential cost savings, efficiency gains, and business agility far outweigh the constraints, positioning modernization as a long-term value driver.

The detailed segments and sub-segments included in the report are:

By Offering:

Software

Services

By Organization Size:

Large Enterprises

SMEs

By Vertical:

BFSI

Telecom

IT & ITES

Retail & Ecommerce

Government

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Large enterprises are projected to dominate the market throughout the forecast period. These organizations, often managing complex legacy infrastructures, have the greatest need to modernize in order to reduce costs, improve operational agility, and unlock advanced analytics capabilities. Their higher financial capacity allows them to implement phased modernization strategies—balancing risk while progressively shifting toward digital-first architectures. Meanwhile, SMEs, though smaller in share, represent an exciting growth frontier. With cloud-native solutions and “modernization-as-a-service” models becoming more accessible, SMEs are increasingly joining the modernization wave to enhance competitiveness in the digital economy.

From a revenue standpoint, services remain the leading contributor to the mainframe modernization market. Consulting, integration, migration, and ongoing support services account for the bulk of spending, as enterprises rely on specialized expertise to mitigate risks and ensure smooth transitions. While software solutions—ranging from modernization platforms to automation tools—are growing steadily, services dominate given the complexity and mission-critical nature of modernization projects. This dynamic reflects a practical reality: while tools are essential, the know-how of providers remains indispensable in delivering successful modernization outcomes.

The key regions considered for the Global Mainframe Modernization Market study include North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. North America leads the global market, underpinned by early adoption of modernization initiatives, advanced IT infrastructure, and the strong presence of both legacy enterprises and leading modernization providers. Europe is following closely, with regulatory pressures and digital innovation programs fueling modernization efforts across industries. Asia Pacific, however, is expected to be the fastest-growing region,

propelled by rapid digitalization in markets such as China and India, rising investments in IT modernization, and the expansion of e-commerce and financial services. Meanwhile, Latin America and the Middle East are gradually emerging as attractive markets, driven by digital-first government initiatives and increasing reliance on core IT infrastructure modernization.

Major market players included in this report are:

IBM Corporation

Amazon Web Services (AWS)

Microsoft Corporation

Google LLC

Oracle Corporation

Capgemini SE

Infosys Limited

Cognizant Technology Solutions

HCL Technologies Limited

Accenture PLC

DXC Technology

Micro Focus International PLC

Fujitsu Limited

Wipro Limited

Tata Consultancy Services (TCS)

Global Mainframe Modernization Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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