

Mainframe Modernization Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

<https://marketpublishers.com/r/MC49A28B278AEN.html>

Date: August 2025

Pages: 122

Price: US\$ 3,200.00 (Single User License)

ID: MC49A28B278AEN

Abstracts

Mainframe Modernization Market Summary

Introduction

Mainframe modernization encompasses the strategic transformation of legacy mainframe systems through various approaches including application refactoring, platform migration, cloud integration, and hybrid architecture implementation. These initiatives enable organizations to preserve critical business logic and data while leveraging modern technologies, improving agility, reducing operational costs, and supporting digital transformation goals. Mainframe modernization solutions address the challenges of aging infrastructure, skills shortage, and integration complexity while maintaining the reliability, security, and performance characteristics that make mainframes essential for mission-critical operations. The market is driven by the need to support digital business initiatives, reduce total cost of ownership, and bridge the gap between legacy systems and modern application architectures. With over 70% of Fortune 500 companies still relying on mainframes for core business operations, and approximately 220 billion lines of COBOL code in production worldwide, modernization has become a strategic imperative rather than an option.

Market Size and Growth Forecast

The global mainframe modernization market is projected to reach between USD 6.0 billion and USD 10.0 billion in 2025, with a compound annual growth rate (CAGR) of 8% to 13% through 2030. This steady growth reflects the urgent need for organizations to modernize their core systems while managing the complexity and risk associated with

legacy transformation.

Regional Analysis

North America: The United States leads with extensive mainframe installations in banking, insurance, and government sectors, while Canada focuses on financial services modernization and regulatory compliance transformation.

Europe: Germany, France, and the United Kingdom dominate the market, driven by stringent data protection regulations, digital transformation initiatives, and the need to maintain competitive advantage in mature markets.

Asia Pacific: Japan and South Korea see significant activity due to large enterprise mainframe deployments, while India and China focus on modernization services and offshore development capabilities.

Rest of the World: Brazil enhances its banking and telecommunications infrastructure modernization, while other emerging markets prioritize government and public sector system upgrades.

Application Analysis

BFSI (Banking, Financial Services, and Insurance): Expected growth of 9-14%, driven by regulatory compliance, digital banking initiatives, and real-time payment system requirements. Trends focus on API-first architectures and cloud-native financial services.

Telecom: Projected growth of 8-12%, linked to 5G infrastructure deployment and customer experience transformation. Developments emphasize network function virtualization and edge computing integration.

IT & ITES: Anticipated growth of 10-15%, tied to service provider capabilities and consulting demand. Advances prioritize automated modernization tools and accelerated transformation methodologies.

Retail & E-commerce: Expected growth of 12-17%, driven by omnichannel integration and customer data platform requirements. Trends highlight inventory management system modernization and supply chain optimization.

Government: Projected growth of 7-11%, key for public service digitization and citizen engagement platforms. Advances focus on interoperability, security, and cost optimization.

Type Analysis

Software Solutions: Expected growth of 9-14%, valued for automated migration tools, development platforms, and integration middleware. Trends focus on low-code/no-code modernization platforms and AI-assisted code transformation.

Services: Projected growth of 8-13%, key for consulting, implementation, and managed services. Advances highlight hybrid delivery models, accelerated methodologies, and outcome-based pricing structures.

Key Market Players

Leading firms include IBM, pioneering hybrid cloud and AI-powered modernization solutions while maintaining mainframe leadership; AWS, advancing cloud migration services and serverless architectures for legacy workloads; TCS (Tata Consultancy Services), offering comprehensive transformation services and industry-specific solutions; Capgemini, specializing in large-scale modernization programs and digital transformation consulting; Infosys, providing automated modernization platforms and hybrid integration services; Wipro, focusing on cloud-native architectures and DevOps transformation; Atos, delivering infrastructure modernization and managed services; Micro Focus, enhancing COBOL and application development tools; BMC Software, innovating in mainframe management and automation software; HCL Technologies, advancing modernization accelerators and platform services; and emerging specialists like Kyndryl providing infrastructure services, Mechanical Orchard offering automated COBOL modernization, CloudFrame specializing in mainframe-to-cloud migration, and Heirloom focusing on incremental modernization approaches. These companies drive market evolution through automation tools, cloud-native architectures, and risk-mitigation methodologies.

Porter's Five Forces Analysis

Threat of New Entrants: Low to Moderate, due to high technical expertise requirements and established client relationships, though cloud-native specialists and AI-powered tools create new entry opportunities.

Threat of Substitutes: Low, as mainframe workloads often have no direct substitutes for performance and reliability requirements, though modern architectures can replace some functionalities.

Bargaining Power of Buyers: Moderate, with large enterprises having significant negotiating power but limited by the specialized nature of mainframe expertise and transformation complexity.

Bargaining Power of Suppliers: Moderate, due to the concentration of mainframe expertise among established vendors, though increasing automation reduces dependency on specialized skills.

Competitive Rivalry: Moderate to High, with competition based on methodology maturity, risk mitigation capabilities, and transformation speed rather than pure pricing.

Market Opportunities and Challenges

Opportunities: The accelerating digital transformation across industries creates urgency for mainframe modernization to support new business models and customer experiences. Cloud adoption continues expanding, with hybrid and multi-cloud strategies requiring mainframe integration and data sharing capabilities. The aging workforce managing legacy systems, with over 50% of mainframe professionals approaching retirement, drives demand for knowledge transfer and system modernization. Artificial intelligence and machine learning integration opportunities enable automated code analysis, testing, and transformation processes. Regulatory requirements for data accessibility, reporting, and compliance create additional modernization drivers across industries.

Challenges: High complexity and risk associated with mission-critical system transformation create significant project management and technical challenges. The shortage of mainframe and modernization expertise limits project execution capabilities and increases costs. Legacy system dependencies and integration complexity can extend project timelines and increase transformation risks. Substantial upfront investments required for modernization projects face budget constraints and ROI justification requirements. Cultural resistance to change and organizational inertia can impede modernization initiatives. The need to maintain business continuity during transformation creates additional technical and operational constraints.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

3.1 Research Scope

3.2 Research Sources

3.2.1 Data Sources

3.2.2 Assumptions

3.3 Research Method

Chapter Four Market Landscape

4.1 Market Overview

4.2 Classification/Types

4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

5.1 Introduction

5.2 Drivers

5.3 Restraints

5.4 Opportunities

5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

6.1 Upstream/Suppliers Analysis

6.2 Mainframe Modernization Analysis

6.2.1 Technology Analysis

6.2.2 Cost Analysis

6.2.3 Market Channel Analysis

6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

7.1 Latest News

7.2 Merger and Acquisition

- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 HISTORICAL AND FORECAST MAINFRAME MODERNIZATION MARKET IN NORTH AMERICA (2020-2030)

- 8.1 Mainframe Modernization Market Size
- 8.2 Mainframe Modernization Market by End Use
- 8.3 Competition by Players/Suppliers
- 8.4 Mainframe Modernization Market Size by Type
- 8.5 Key Countries Analysis
 - 8.5.1 United States
 - 8.5.2 Canada
 - 8.5.3 Mexico

CHAPTER 9 HISTORICAL AND FORECAST MAINFRAME MODERNIZATION MARKET IN SOUTH AMERICA (2020-2030)

- 9.1 Mainframe Modernization Market Size
- 9.2 Mainframe Modernization Market by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Mainframe Modernization Market Size by Type
- 9.5 Key Countries Analysis
 - 9.5.1 Brazil
 - 9.5.2 Argentina
 - 9.5.3 Chile
 - 9.5.4 Peru

CHAPTER 10 HISTORICAL AND FORECAST MAINFRAME MODERNIZATION MARKET IN ASIA & PACIFIC (2020-2030)

- 10.1 Mainframe Modernization Market Size
- 10.2 Mainframe Modernization Market by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Mainframe Modernization Market Size by Type
- 10.5 Key Countries Analysis
 - 10.5.1 China
 - 10.5.2 India
 - 10.5.3 Japan

- 10.5.4 South Korea
- 10.5.5 Southeast Asia
- 10.5.6 Australia

CHAPTER 11 HISTORICAL AND FORECAST MAINFRAME MODERNIZATION MARKET IN EUROPE (2020-2030)

- 11.1 Mainframe Modernization Market Size
- 11.2 Mainframe Modernization Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Mainframe Modernization Market Size by Type
- 11.5 Key Countries Analysis
 - 11.5.1 Germany
 - 11.5.2 France
 - 11.5.3 United Kingdom
 - 11.5.4 Italy
 - 11.5.5 Spain
 - 11.5.6 Belgium
 - 11.5.7 Netherlands
 - 11.5.8 Austria
 - 11.5.9 Poland
 - 11.5.10 Russia

CHAPTER 12 HISTORICAL AND FORECAST MAINFRAME MODERNIZATION MARKET IN MEA (2020-2030)

- 12.1 Mainframe Modernization Market Size
- 12.2 Mainframe Modernization Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Mainframe Modernization Market Size by Type
- 12.5 Key Countries Analysis
 - 12.5.1 Egypt
 - 12.5.2 Israel
 - 12.5.3 South Africa
 - 12.5.4 Gulf Cooperation Council Countries
 - 12.5.5 Turkey

CHAPTER 13 SUMMARY FOR GLOBAL MAINFRAME MODERNIZATION MARKET (2020-2025)

- 13.1 Mainframe Modernization Market Size
- 13.2 Mainframe Modernization Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Mainframe Modernization Market Size by Type

CHAPTER 14 GLOBAL MAINFRAME MODERNIZATION MARKET FORECAST (2025-2030)

- 14.1 Mainframe Modernization Market Size Forecast
- 14.2 Mainframe Modernization Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Mainframe Modernization Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

15.1 IBM

- 15.1.1 Company Profile
- 15.1.2 Main Business and Mainframe Modernization Information
- 15.1.3 SWOT Analysis of IBM
- 15.1.4 IBM Mainframe Modernization Revenue, Gross Margin and Market Share (2020-2025)

15.2 AWS

- 15.2.1 Company Profile
- 15.2.2 Main Business and Mainframe Modernization Information
- 15.2.3 SWOT Analysis of AWS
- 15.2.4 AWS Mainframe Modernization Revenue, Gross Margin and Market Share (2020-2025)

15.3 TCS

- 15.3.1 Company Profile
- 15.3.2 Main Business and Mainframe Modernization Information
- 15.3.3 SWOT Analysis of TCS
- 15.3.4 TCS Mainframe Modernization Revenue, Gross Margin and Market Share (2020-2025)

15.4 Capgemini

- 15.4.1 Company Profile
- 15.4.2 Main Business and Mainframe Modernization Information
- 15.4.3 SWOT Analysis of Capgemini
- 15.4.4 Capgemini Mainframe Modernization Revenue, Gross Margin and Market

Share (2020-2025)

15.5 Infosys

15.5.1 Company Profile

15.5.2 Main Business and Mainframe Modernization Information

15.5.3 SWOT Analysis of Infosys

15.5.4 Infosys Mainframe Modernization Revenue, Gross Margin and Market Share

(2020-2025)

15.6 Wipro

15.6.1 Company Profile

15.6.2 Main Business and Mainframe Modernization Information

15.6.3 SWOT Analysis of Wipro

15.6.4 Wipro Mainframe Modernization Revenue, Gross Margin and Market Share

(2020-2025)

15.7 Atos

15.7.1 Company Profile

15.7.2 Main Business and Mainframe Modernization Information

15.7.3 SWOT Analysis of Atos

15.7.4 Atos Mainframe Modernization Revenue, Gross Margin and Market Share

(2020-2025)

15.8 Micro Focus

15.8.1 Company Profile

15.8.2 Main Business and Mainframe Modernization Information

15.8.3 SWOT Analysis of Micro Focus

15.8.4 Micro Focus Mainframe Modernization Revenue, Gross Margin and Market

Share (2020-2025)

15.9 BMC Software

15.9.1 Company Profile

15.9.2 Main Business and Mainframe Modernization Information

15.9.3 SWOT Analysis of BMC Software

15.9.4 BMC Software Mainframe Modernization Revenue, Gross Margin and Market

Share (2020-2025)

15.10 HCL Tech

15.10.1 Company Profile

15.10.2 Main Business and Mainframe Modernization Information

15.10.3 SWOT Analysis of HCL Tech

15.10.4 HCL Tech Mainframe Modernization Revenue, Gross Margin and Market

Share (2020-2025)

15.11 Fujitsu

15.11.1 Company Profile

- 15.11.2 Main Business and Mainframe Modernization Information
 - 15.11.3 SWOT Analysis of Fujitsu
 - 15.11.4 Fujitsu Mainframe Modernization Revenue, Gross Margin and Market Share (2020-2025)
 - 15.12 Cognizant
 - 15.12.1 Company Profile
 - 15.12.2 Main Business and Mainframe Modernization Information
 - 15.12.3 SWOT Analysis of Cognizant
 - 15.12.4 Cognizant Mainframe Modernization Revenue, Gross Margin and Market Share (2020-2025)
 - 15.13 DxC Technology
 - 15.13.1 Company Profile
 - 15.13.2 Main Business and Mainframe Modernization Information
 - 15.13.3 SWOT Analysis of DxC Technology
 - 15.13.4 DxC Technology Mainframe Modernization Revenue, Gross Margin and Market Share (2020-2025)
 - 15.14 Kyndryl
 - 15.14.1 Company Profile
 - 15.14.2 Main Business and Mainframe Modernization Information
 - 15.14.3 SWOT Analysis of Kyndryl
 - 15.14.4 Kyndryl Mainframe Modernization Revenue, Gross Margin and Market Share (2020-2025)
 - 15.15 Rocket Software
 - 15.15.1 Company Profile
 - 15.15.2 Main Business and Mainframe Modernization Information
 - 15.15.3 SWOT Analysis of Rocket Software
 - 15.15.4 Rocket Software Mainframe Modernization Revenue, Gross Margin and Market Share (2020-2025)
 - 15.16 Tech Mahindra
 - 15.16.1 Company Profile
 - 15.16.2 Main Business and Mainframe Modernization Information
 - 15.16.3 SWOT Analysis of Tech Mahindra
 - 15.16.4 Tech Mahindra Mainframe Modernization Revenue, Gross Margin and Market Share (2020-2025)
- Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms

Table Research Scope of Mainframe Modernization Report

Table Data Sources of Mainframe Modernization Report

Table Major Assumptions of Mainframe Modernization Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Mainframe Modernization Picture

Table Mainframe Modernization Classification

Table Mainframe Modernization Applications

Table Drivers of Mainframe Modernization Market

Table Restraints of Mainframe Modernization Market

Table Opportunities of Mainframe Modernization Market

Table Threats of Mainframe Modernization Market

Table Covid-19 Impact For Mainframe Modernization Market

Table Raw Materials Suppliers

Table Different Production Methods of Mainframe Modernization

Table Cost Structure Analysis of Mainframe Modernization

Table Key End Users

Table Latest News of Mainframe Modernization Market

Table Merger and Acquisition

Table Planned/Future Project of Mainframe Modernization Market

Table Policy of Mainframe Modernization Market

Table 2020-2030 North America Mainframe Modernization Market Size

Figure 2020-2030 North America Mainframe Modernization Market Size and CAGR

Table 2020-2030 North America Mainframe Modernization Market Size by Application

Table 2020-2025 North America Mainframe Modernization Key Players Revenue

Table 2020-2025 North America Mainframe Modernization Key Players Market Share

Table 2020-2030 North America Mainframe Modernization Market Size by Type

Table 2020-2030 United States Mainframe Modernization Market Size

Table 2020-2030 Canada Mainframe Modernization Market Size

Table 2020-2030 Mexico Mainframe Modernization Market Size

Table 2020-2030 South America Mainframe Modernization Market Size

Figure 2020-2030 South America Mainframe Modernization Market Size and CAGR

Table 2020-2030 South America Mainframe Modernization Market Size by Application

Table 2020-2025 South America Mainframe Modernization Key Players Revenue

Table 2020-2025 South America Mainframe Modernization Key Players Market Share
Table 2020-2030 South America Mainframe Modernization Market Size by Type
Table 2020-2030 Brazil Mainframe Modernization Market Size
Table 2020-2030 Argentina Mainframe Modernization Market Size
Table 2020-2030 Chile Mainframe Modernization Market Size
Table 2020-2030 Peru Mainframe Modernization Market Size
Table 2020-2030 Asia & Pacific Mainframe Modernization Market Size
Figure 2020-2030 Asia & Pacific Mainframe Modernization Market Size and CAGR
Table 2020-2030 Asia & Pacific Mainframe Modernization Market Size by Application
Table 2020-2025 Asia & Pacific Mainframe Modernization Key Players Revenue
Table 2020-2025 Asia & Pacific Mainframe Modernization Key Players Market Share
Table 2020-2030 Asia & Pacific Mainframe Modernization Market Size by Type
Table 2020-2030 China Mainframe Modernization Market Size
Table 2020-2030 India Mainframe Modernization Market Size
Table 2020-2030 Japan Mainframe Modernization Market Size
Table 2020-2030 South Korea Mainframe Modernization Market Size
Table 2020-2030 Southeast Asia Mainframe Modernization Market Size
Table 2020-2030 Australia Mainframe Modernization Market Size
Table 2020-2030 Europe Mainframe Modernization Market Size
Figure 2020-2030 Europe Mainframe Modernization Market Size and CAGR
Table 2020-2030 Europe Mainframe Modernization Market Size by Application
Table 2020-2025 Europe Mainframe Modernization Key Players Revenue
Table 2020-2025 Europe Mainframe Modernization Key Players Market Share
Table 2020-2030 Europe Mainframe Modernization Market Size by Type
Table 2020-2030 Germany Mainframe Modernization Market Size
Table 2020-2030 France Mainframe Modernization Market Size
Table 2020-2030 United Kingdom Mainframe Modernization Market Size
Table 2020-2030 Italy Mainframe Modernization Market Size
Table 2020-2030 Spain Mainframe Modernization Market Size
Table 2020-2030 Belgium Mainframe Modernization Market Size
Table 2020-2030 Netherlands Mainframe Modernization Market Size
Table 2020-2030 Austria Mainframe Modernization Market Size
Table 2020-2030 Poland Mainframe Modernization Market Size
Table 2020-2030 Russia Mainframe Modernization Market Size
Table 2020-2030 MEA Mainframe Modernization Market Size
Figure 2020-2030 MEA Mainframe Modernization Market Size and CAGR
Table 2020-2030 MEA Mainframe Modernization Market Size by Application
Table 2020-2025 MEA Mainframe Modernization Key Players Revenue
Table 2020-2025 MEA Mainframe Modernization Key Players Market Share

Table 2020-2030 MEA Mainframe Modernization Market Size by Type

Table 2020-2030 Egypt Mainframe Modernization Market Size

Table 2020-2030 Israel Mainframe Modernization Market Size

Table 2020-2030 South Africa Mainframe Modernization Market Size

Table 2020-2030 Gulf Cooperation Council Countries Mainframe Modernization Market Size

Table 2020-2030 Turkey Mainframe Modernization Market Size

Table 2020-2025 Global Mainframe Modernization Market Size by Region

Table 2020-2025 Global Mainframe Modernization Market Size Share by Region

Table 2020-2025 Global Mainframe Modernization Market Size by Application

Table 2020-2025 Global Mainframe Modernization Market Share by Application

Table 2020-2025 Global Mainframe Modernization Key Vendors Revenue

Figure 2020-2025 Global Mainframe Modernization Market Size and Growth Rate

Table 2020-2025 Global Mainframe Modernization Key Vendors Market Share

Table 2020-2025 Global Mainframe Modernization Market Size by Type

Table 2020-2025 Global Mainframe Modernization Market Share by Type

Table 2025-2030 Global Mainframe Modernization Market Size by Region

Table 2025-2030 Global Mainframe Modernization Market Size Share by Region

Table 2025-2030 Global Mainframe Modernization Market Size by Application

Table 2025-2030 Global Mainframe Modernization Market Share by Application

Table 2025-2030 Global Mainframe Modernization Key Vendors Revenue

Figure 2025-2030 Global Mainframe Modernization Market Size and Growth Rate

Table 2025-2030 Global Mainframe Modernization Key Vendors Market Share

Table 2025-2030 Global Mainframe Modernization Market Size by Type

Table 2025-2030 Mainframe Modernization Global Market Share by Type

I would like to order

Product name: Mainframe Modernization Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

Product link: <https://marketpublishers.com/r/MC49A28B278AEN.html>

Price: US\$ 3,200.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/MC49A28B278AEN.html>