

# **Asia Pacific Mainframe Modernization Services Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Services (Application Modernization, Cloud Migration, and Data Modernization), Enterprise Size (Large Enterprises and SMEs), and End-Use Industry (IT and Telecom, BFSI, Healthcare, Manufacturing, Retail, Education, and Others)**

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## **Abstracts**

The Asia Pacific mainframe modernization services market is projected to grow significantly, reaching an estimated US\$ 24,500.31 million by 2031, up from US\$ 7,956.53 million in 2023. This growth represents a compound annual growth rate (CAGR) of 15.1% from 2023 to 2031, indicating a robust demand for modernization services in the region.

## **Executive Summary and Market Analysis**

The Asia Pacific region encompasses several rapidly developing economies, including India, China, Thailand, Vietnam, Singapore, Taiwan, and New Zealand. These nations are increasingly adopting advanced technologies to enhance their digital capabilities and maintain long-term competitiveness. Governments across the region are implementing strategic initiatives aimed at digitalization. A notable example is the Chinese government's announcement in February 2023 of a comprehensive plan for the development of a "Digital China." This initiative aims to promote the integration of digital technologies across various sectors, including economics, politics, culture, social affairs, and environmental sustainability. By 2025, China plans to establish a nationwide system

to support its digitalization goals, with aspirations to become a global leader in digitalization by 2035. This push for digital transformation is expected to significantly drive the growth of the mainframe modernization services market in the Asia Pacific.

## **Strategic Insights**

### **Market Segmentation Analysis**

The Asia Pacific mainframe modernization services market can be segmented based on services offered, enterprise size, and end-use industries.

1. **Services:** The market is divided into three primary service categories: application modernization, cloud migration, and data modernization. In 2023, the application modernization segment captured the largest market share, reflecting the high demand for updating and optimizing legacy applications to meet current business needs.

2. **Enterprise Size:** The market is further categorized into large enterprises and small to medium-sized enterprises (SMEs). Large enterprises dominated the market share in 2023, as they typically have more extensive IT infrastructures and a greater need for modernization services to enhance operational efficiency.

3. **End-Use Industry:** The market is segmented into various industries, including IT and telecom, banking, financial services, and insurance (BFSI), healthcare, manufacturing, retail, education, and others. The IT and telecom sector held the largest share in 2023, driven by the rapid technological advancements and the need for robust IT systems in these industries.

### **Market Outlook**

Effective management of IT infrastructure is crucial for organizations to ensure seamless operations. As software continues to evolve, it introduces complexities that necessitate compatibility and security measures. Efficient IT infrastructure management solutions are essential to minimize inefficiencies and optimize resource utilization. As organizations expand, their IT infrastructure also grows, requiring new technology implementations or integrations, which can increase vulnerabilities. This scenario is expected to further drive the demand for mainframe modernization services in the coming years.

### **Country Insights**

The Asia Pacific mainframe modernization services market includes key countries such as China, Japan, India, South Korea, Australia, and other nations in the region. In 2023, China held the largest market share, primarily due to its status as the world's largest manufacturing hub, producing approximately 36% of global electronics, including smartphones, computers, cloud servers, and telecommunications infrastructure. The Chinese government and local manufacturers are actively working to enhance production capacity and efficiency through the adoption of new technologies. This trend is anticipated to boost the demand for mainframe modernization services, as these services can help manufacturers optimize their IT operations effectively.

### **Company Profiles**

Several prominent players are operating in the Asia Pacific mainframe modernization services market, including:

Accenture Plc

Capgemini SE

Infosys Ltd

Fujitsu Ltd

Cognizant Technology Solutions Corp

Microsoft Corp

Mphasis Ltd

Innova Solutions

DXC Technology Co

Amazon Web Services Inc

International Business Machines Corp (IBM)

HCL Technologies Ltd

Atos SE

Tata Consultancy Services Ltd (TCS)

Oracle Corp

EPAM Systems Inc

Ensono, LLC

Hexaware Technologies Ltd

Software AG

Kyndryl Holdings Inc

These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their offerings and increase their market share. The competitive landscape is characterized by a focus on delivering innovative solutions to meet the evolving needs of clients in the mainframe modernization services sector.

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