

Europe 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 Europe mainframe modernization services market is projected to grow significantly, reaching approximately US\$ 25,691.86 million by 2031, up from US\$ 9,540.45 million in 2023. This growth represents a compound annual growth rate (CAGR) of 13.2% from 2023 to 2031.

Executive Summary and Market Analysis

The European IT management as a service market is divided into several key regions, including Germany, France, Russia, the UK, Italy, and the Rest of Europe. The continent is experiencing a surge in digitalization across various sectors, particularly in banking, financial services, and insurance (BFSI). Major banking institutions in Europe are actively pursuing digital transformation strategies aimed at enhancing customer experience and providing round-the-clock digital services. The European Union (EU) has set ambitious digitalization goals for 2030, including ensuring that over 90% of small and medium-sized enterprises (SMEs) achieve at least a basic level of digital intensity and that 75% of EU companies utilize cloud computing services. Furthermore, the EU aims for large-scale data analysis to be conducted using artificial intelligence (AI) by

2030. As of 2023, over 70% of EU companies have reached a basic level of digital intensity, with SMEs at 69% and large enterprises at 98%.

Despite this progress, many European organizations, especially in the banking, insurance, and government sectors, continue to rely on legacy mainframe systems that have been in place for decades. This dependency, combined with the pressing need to adapt to modern business demands, is driving the demand for mainframe modernization services across various industries, which is expected to fuel market growth from 2023 to 2031.

Strategic Insights

Market Segmentation Analysis

The Europe mainframe modernization services market can be segmented based on services, enterprise size, and end-use industry.

1. **Services:** The market is categorized into application modernization, cloud migration, and data modernization. In 2023, the application modernization segment held the largest market share, reflecting the critical need for organizations to update their applications to meet current technological standards.
2. **Enterprise Size:** The market is divided into large enterprises and SMEs. In 2023, large enterprises dominated the market, indicating that larger organizations are more likely to invest in modernization services due to their extensive legacy systems and greater resources.
3. **End-Use Industry:** The market is further segmented into IT and telecom, BFSI, healthcare, manufacturing, retail, education, and others. The IT and telecom sector accounted for the largest share in 2023, driven by the rapid integration of emerging technologies such as the Internet of Things (IoT), automation, machine learning, and AI.

Market Outlook

The IT and telecom sector has seen substantial growth due to the adoption of advanced technologies. Companies are increasingly prioritizing mainframe modernization services to ensure efficient system operations. These services facilitate the migration of mainframe applications to cloud environments using modern methodologies such as APIs, microservices, and DevOps practices. Mainframe systems, which consist of high-

performance hardware and extensive software applications, require modernization to operate efficiently in today's fast-paced digital landscape.

The growing adoption of advanced technologies across various sectors, including banking, healthcare, government, and transportation, is expected to further drive the demand for IT infrastructure transformation and mainframe modernization services. A recent survey by Kyndryl in September 2024 revealed that 86% of business and IT leaders are engaged in adopting AI to accelerate their mainframe modernization initiatives. Additionally, a Red Hat survey indicated that 95% of IT decision-makers believe application modernization is crucial for their organizations' success, with 75% having completed at least small-scale modernization projects.

Country Insights

The Europe mainframe modernization services market includes key countries such as the UK, Germany, France, Italy, Russia, and others. The UK held the largest market share in 2023, reflecting its advanced technological landscape and high demand for modernization services.

As businesses increasingly rely on technology to enhance operations, optimize service delivery, and improve customer experiences, the demand for mainframe modernization services has surged. The integration of cloud computing and hybrid cloud environments has led to a rise in interconnected systems, applications, and devices, necessitating effective management of these complex IT resources.

Company Profiles

Key players in the Europe mainframe modernization services market include 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, HCL Technologies Ltd, Atos SE, Tata Consultancy Services Ltd, Oracle Corp, EPAM Systems Inc, Ensono, LLC, Hexaware Technologies Ltd, Software AG, and Kyndryl Holdings Inc, among others. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their offerings and increase market share.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. EUROPE MAINFRAME MODERNIZATION SERVICES MARKET LANDSCAPE

- 4.1 Overview
- 4.2 Ecosystem Analysis
 - 4.2.1 List of Vendors in the Value Chain

5. EUROPE MAINFRAME MODERNIZATION SERVICES MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 The Rise in Adoption of Mainframe Modernization Services In Various Sectors
 - 5.1.2 Digital Transformation Across the Globe
 - 5.1.3 Growing Adoption of Cloud Computing
- 5.2 Market Restraints
 - 5.2.1 Challenges in Mainframe Modernization
- 5.3 Market Opportunities
 - 5.3.1 Growing Adoption of Data Analytics

5.4 Future Trends

5.4.1 Increase in Investment Towards the Transformation of IT Infrastructure

5.4.2 Integration with AI and ML

5.5 Impact of Drivers and Restraints:

6. EUROPE MAINFRAME MODERNIZATION SERVICES MARKET - ANALYSIS

6.1 Europe Mainframe Modernization Services Market Revenue (US\$ Million), 2021-2031

6.2 Europe Mainframe Modernization Services Market Forecast Analysis

7. EUROPE MAINFRAME MODERNIZATION SERVICES MARKET ANALYSIS - BY SERVICES

7.1 Application Modernization

7.1.1 Overview

7.1.2 Application Modernization: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.2 Cloud Migration

7.2.1 Overview

7.2.2 Cloud Migration: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.3 Data Modernization

7.3.1 Overview

7.3.2 Data Modernization: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8. EUROPE MAINFRAME MODERNIZATION SERVICES MARKET ANALYSIS - BY ENTERPRISE SIZE

8.1 Large Enterprises

8.1.1 Overview

8.1.2 Large Enterprises: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.2 SMEs

8.2.1 Overview

8.2.2 SMEs: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9. EUROPE MAINFRAME MODERNIZATION SERVICES MARKET ANALYSIS - BY END USE INDUSTRY

9.1 IT and Telecom

9.1.1 Overview

9.1.2 IT and Telecom: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.2 BFSI

9.2.1 Overview

9.2.2 BFSI: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.3 Healthcare

9.3.1 Overview

9.3.2 Healthcare: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.4 Manufacturing

9.4.1 Overview

9.4.2 Manufacturing: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.5 Retail

9.5.1 Overview

9.5.2 Retail: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.6 Education

9.6.1 Overview

9.6.2 Education: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.7 Others

9.7.1 Overview

9.7.2 Others: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10. EUROPE MAINFRAME MODERNIZATION SERVICES MARKET - COUNTRY ANALYSIS

10.1 Europe

10.1.1 Europe Mainframe Modernization Services Market - Revenue and Forecast Analysis - by Country

10.1.1.1 Europe Mainframe Modernization Services Market - Revenue and Forecast

Analysis - by Country

10.1.1.2 United Kingdom: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.2.1 United Kingdom: Europe Mainframe Modernization Services Market Share - by Services

10.1.1.2.2 United Kingdom: Europe Mainframe Modernization Services Market Share - by Enterprise Size

10.1.1.2.3 United Kingdom: Europe Mainframe Modernization Services Market Share - by End Use Industry

10.1.1.3 Germany: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.3.1 Germany: Europe Mainframe Modernization Services Market Share - by Services

10.1.1.3.2 Germany: Europe Mainframe Modernization Services Market Share - by Enterprise Size

10.1.1.3.3 Germany: Europe Mainframe Modernization Services Market Share - by End Use Industry

10.1.1.4 France: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.4.1 France: Europe Mainframe Modernization Services Market Share - by Services

10.1.1.4.2 France: Europe Mainframe Modernization Services Market Share - by Enterprise Size

10.1.1.4.3 France: Europe Mainframe Modernization Services Market Share - by End Use Industry

10.1.1.5 Italy: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.5.1 Italy: Europe Mainframe Modernization Services Market Share - by Services

10.1.1.5.2 Italy: Europe Mainframe Modernization Services Market Share - by Enterprise Size

10.1.1.5.3 Italy: Europe Mainframe Modernization Services Market Share - by End Use Industry

10.1.1.6 Russia: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.6.1 Russia: Europe Mainframe Modernization Services Market Share - by Services

10.1.1.6.2 Russia: Europe Mainframe Modernization Services Market Share - by Enterprise Size

10.1.1.6.3 Russia: Europe Mainframe Modernization Services Market Share - by End Use Industry

10.1.1.7 Rest of Europe: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.7.1 Rest of Europe: Europe Mainframe Modernization Services Market Share - by Services

10.1.1.7.2 Rest of Europe: Europe Mainframe Modernization Services Market Share - by Enterprise Size

10.1.1.7.3 Rest of Europe: Europe Mainframe Modernization Services Market Share - by End Use Industry

11. COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Positioning and Concentration

12. INDUSTRY LANDSCAPE

12.1 Overview

12.2 Market Initiative

12.3 Partnerships and Collaborations

12.4 Other Developments

13. COMPANY PROFILES

13.1 Accenture Plc

13.1.1 Key Facts

13.1.2 Business Description

13.1.3 Products and Services

13.1.4 Financial Overview

13.1.5 SWOT Analysis

13.1.6 Key Developments

13.2 Capgemini SE

13.2.1 Key Facts

13.2.2 Business Description

13.2.3 Products and Services

13.2.4 Financial Overview

13.2.5 SWOT Analysis

13.2.6 Key Developments

13.3 Infosys Ltd

13.3.1 Key Facts

13.3.2 Business Description

13.3.3 Products and Services

13.3.4 Financial Overview

13.3.5 SWOT Analysis

13.3.6 Key Developments

13.4 Fujitsu Ltd

13.4.1 Key Facts

13.4.2 Business Description

13.4.3 Products and Services

13.4.4 Financial Overview

13.4.5 SWOT Analysis

13.4.6 Key Developments

13.5 Cognizant Technology Solutions Corp

13.5.1 Key Facts

13.5.2 Business Description

13.5.3 Products and Services

13.5.4 Financial Overview

13.5.5 SWOT Analysis

13.5.6 Key Developments

13.6 Microsoft Corp

13.6.1 Key Facts

13.6.2 Business Description

13.6.3 Products and Services

13.6.4 Financial Overview

13.6.5 SWOT Analysis

13.6.6 Key Developments

13.7 Mphasis Ltd

13.7.1 Key Facts

13.7.2 Business Description

13.7.3 Products and Services

13.7.4 Financial Overview

13.7.5 SWOT Analysis

13.7.6 Key Developments

13.8 Innova Solutions

13.8.1 Key Facts

13.8.2 Business Description

13.8.3 Products and Services

- 13.8.4 Financial Overview
- 13.8.5 SWOT Analysis
- 13.8.6 Key Developments
- 13.9 DXC Technology Co
 - 13.9.1 Key Facts
 - 13.9.2 Business Description
 - 13.9.3 Products and Services
 - 13.9.4 Financial Overview
 - 13.9.5 SWOT Analysis
 - 13.9.6 Key Developments
- 13.10 Amazon.com Inc
 - 13.10.1 Key Facts
 - 13.10.2 Business Description
 - 13.10.3 Products and Services
 - 13.10.4 Financial Overview
 - 13.10.5 SWOT Analysis
 - 13.10.6 Key Developments
- 13.11 International Business Machines Corp
 - 13.11.1 Key Facts
 - 13.11.2 Business Description
 - 13.11.3 Products and Services
 - 13.11.4 Financial Overview
 - 13.11.5 SWOT Analysis
 - 13.11.6 Key Developments
- 13.12 HCL Technologies Ltd
 - 13.12.1 Key Facts
 - 13.12.2 Business Description
 - 13.12.3 Products and Services
 - 13.12.4 Financial Overview
 - 13.12.5 SWOT Analysis
 - 13.12.6 Key Developments
- 13.13 Atos SE
 - 13.13.1 Key Facts
 - 13.13.2 Business Description
 - 13.13.3 Products and Services
 - 13.13.4 Financial Overview
 - 13.13.5 SWOT Analysis
 - 13.13.6 Key Developments
- 13.14 Tata Consultancy Services Ltd

- 13.14.1 Key Facts
- 13.14.2 Business Description
- 13.14.3 Products and Services
- 13.14.4 Financial Overview
- 13.14.5 SWOT Analysis
- 13.14.6 Key Developments
- 13.15 Oracle Corp
 - 13.15.1 Key Facts
 - 13.15.2 Business Description
 - 13.15.3 Products and Services
 - 13.15.4 Financial Overview
 - 13.15.5 SWOT Analysis
 - 13.15.6 Key Developments
- 13.16 EPAM Systems Inc
 - 13.16.1 Key Facts
 - 13.16.2 Business Description
 - 13.16.3 Products and Services
 - 13.16.4 Financial Overview
 - 13.16.5 SWOT Analysis
 - 13.16.6 Key Developments
- 13.17 Ensono, LLC
 - 13.17.1 Key Facts
 - 13.17.2 Business Description
 - 13.17.3 Products and Services
 - 13.17.4 Financial Overview
 - 13.17.5 SWOT Analysis
 - 13.17.6 Key Developments
- 13.18 Hexaware Technologies Ltd
 - 13.18.1 Key Facts
 - 13.18.2 Business Description
 - 13.18.3 Products and Services
 - 13.18.4 Financial Overview
 - 13.18.5 SWOT Analysis
 - 13.18.6 Key Developments
- 13.19 Software AG
 - 13.19.1 Key Facts
 - 13.19.2 Business Description
 - 13.19.3 Products and Services
 - 13.19.4 Financial Overview

- 13.19.5 SWOT Analysis
- 13.19.6 Key Developments
- 13.20 Kyndryl Holdings Inc
 - 13.20.1 Key Facts
 - 13.20.2 Business Description
 - 13.20.3 Products and Services
 - 13.20.4 Financial Overview
 - 13.20.5 SWOT Analysis
 - 13.20.6 Key Developments

14. APPENDIX

- 14.1 About Us
- 14.2 List of Abbreviations

List Of Tables

LIST OF TABLES

Table 1. Europe Mainframe Modernization Services Market Segmentation

Table 2. List of Vendors

Table 3. Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Table 4. Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Services

Table 5. Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Enterprise Size

Table 6. Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by End Use Industry

Table 7. Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Country

Table 8. United Kingdom: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services

Table 9. United Kingdom: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Enterprise Size

Table 10. United Kingdom: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End Use Industry

Table 11. Germany: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services

Table 12. Germany: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Enterprise Size

Table 13. Germany: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End Use Industry

Table 14. France: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services

Table 15. France: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Enterprise Size

Table 16. France: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End Use Industry

Table 17. Italy: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services

Table 18. Italy: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Enterprise Size

Table 19. Italy: Europe Mainframe Modernization Services Market - Revenue and

Forecast, 2021 - 2031 (US\$ Million) - by End Use Industry

Table 20. Russia: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services

Table 21. Russia: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Enterprise Size

Table 22. Russia: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End Use Industry

Table 23. Rest of Europe: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Services

Table 24. Rest of Europe: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Enterprise Size

Table 25. Rest of Europe: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End Use Industry

Table 26. List of Abbreviations

List Of Figures

LIST OF FIGURES

Figure 1. Europe Mainframe Modernization Services Market Segmentation - Country

Figure 2. Europe Mainframe Modernization Services Market - Key Market Dynamics

Figure 3. Impact Analysis of Drivers and Restraints

Figure 4. Europe Mainframe Modernization Services Market Revenue (US\$ Million), 2021-2031

Figure 5. Europe Mainframe Modernization Services Market Share (%) - by Services (2023 and 2031)

Figure 6. Application Modernization: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 7. Cloud Migration: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 8. Data Modernization: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 9. Europe Mainframe Modernization Services Market Share (%) - by Enterprise Size (2023 and 2031)

Figure 10. Large Enterprises: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 11. SMEs: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 12. Europe Mainframe Modernization Services Market Share (%) - by End Use Industry (2023 and 2031)

Figure 13. IT and Telecom: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 14. BFSI: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 15. Healthcare: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 16. Manufacturing: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 17. Retail: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 18. Education: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 19. Others: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 20. Europe Mainframe Modernization Services Market Breakdown, by Key Countries, 2023 and 2031 (%)

Figure 21. United Kingdom: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 22. Germany: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 23. France: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 24. Italy: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 25. Russia: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 26. Rest of Europe: Europe Mainframe Modernization Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 27. Heat Map Analysis by Key Players

Figure 28. Company Positioning and Concentration

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