

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

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## **Abstracts**

The mainframe modernization services market size was valued at US\$ 33.55 billion in 2023 and is expected to reach US\$ 86.14 billion by 2031; it is estimated to record a CAGR of 12.5% from 2023 to 2031.

The mainframe modernization services market is segmented into five major regions—North America, Europe, Asia Pacific (APAC), the Middle East & Africa (MEA), and South & Central America. North America dominated the market in 2023, followed by Europe and Asia Pacific, respectively. The mainframe modernization services market in North America is segmented into the US, Canada, and Mexico. North America is the early adopter of technologies and has a good IT infrastructure. According to the International Trade Administration, the US accounts for one-third of the US\$ 5 trillion worldwide information technology (IT) market, making it the world's largest. In addition, the sector supports 12.1 million employment and contributes ~US\$ 1.9 trillion to the US value-added GDP. Furthermore, according to CompTIA, there are over 557,000 software and IT service companies in the US. As per the International Trade Administration, the ICT industry in Canada comprises more than 43,200 businesses. Of these, the major number of companies operate in the computer services and software

sectors. The industry is primarily made up of small businesses, with ~35,500 employing fewer than ten people. There are nearly 100 significant companies, including subsidiaries of international multinational corporations, that employ more than 500 people. Having such a big IT industry in the region is raising the need for mainframe modernization services.

Asia Pacific consists of various growing economies such as India, China, Thailand, Vietnam, Singapore, Taiwan, and New Zealand. These countries are experiencing a gradual increase in the adoption of advanced technologies. Digital capabilities are continually being developed in the region to maintain competitiveness in the long term. Governments of various countries are taking strategic steps toward digitalization. For example, in February 2023, the Chinese government released the overall plan for the development of a digital China. In addition, the plan is to promote the use of digital technologies in the areas of economics, politics, culture, social affairs, and environment sustenance. According to the plan, China will build a nationwide system by 2025 to achieve its Digital China goal. By 2035, China wants to be one of the world's leading economies in terms of the level of digitalization. The plan is to promote the use of digital technologies in the areas of economics, politics, culture, social affairs, and environment refurbishment. Therefore, increasing adoption of digital technologies is expected to boost the growth of the mainframe modernization services market in the region.

Based on enterprise size, the global mainframe modernization services market is bifurcated into SMEs and large enterprises. The large enterprises segment dominated the market for enterprise size in 2023 owing to increasing adoption by banking, insurance, and financial services organizations. Infosys supports leading life insurance companies in North America with its legacy mainframe applications. With the help of mainframe modernization services, Infosys aided insurance companies in their digital transformation journey and assisted in reducing maintenance costs and simplifying the existing system functionalities. Several leading organizations are adopting data migration services to solve complex data-related problems. Infosys provided a hybrid system for a Europe-based multinational corporation with a migration program. Infosys assisted the client in enabling bi-directional higher throughput to ensure streamlined data flow processing. Infosys assisted to visualize a hybrid system by integrating critical business workflows across AS/400 and SAP applications. This setup ensures streamline data processing and data flow. Infosys managed the to optimize the workflow.

Accenture; Capgemini; Cognizant; Amazon Web Services, Inc.; Infosys Limited; Fujitsu; HCL Technologies Limited; Wipro Digital; IBM; Ensono; Tata Consultancy Services

Limited; Atos SE; Hexaware Technologies Limited; Microsoft; DXC Technology Company; EPAM Systems, Inc.; Innova Solutions; Oracle; Mphasis; and Software AG are among the key mainframe modernization services market players that are profiled in this market study.

The overall mainframe modernization services market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the mainframe modernization services market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the mainframe modernization services market.

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

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