

# **North America 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)**

<https://marketpublishers.com/r/N3AB18905C2FEN.html>

Date: October 2025

Pages: 211

Price: US\$ 3,450.00 (Single User License)

ID: N3AB18905C2FEN

## **Abstracts**

The North America mainframe modernization services market is projected to grow significantly, reaching approximately US\$ 29,655.76 million by 2031, up from US\$ 12,972.47 million in 2023. This growth represents a compound annual growth rate (CAGR) of 10.9% from 2023 to 2031.

## **Executive Summary and Market Analysis**

The mainframe modernization services market in North America is divided into three primary regions: the United States, Canada, and Mexico. North America is recognized as an early adopter of advanced technologies, supported by a robust IT infrastructure. According to the International Trade Administration, the United States alone accounts for about one-third of the global information technology (IT) market, which is valued at US\$ 5 trillion, making it the largest IT market worldwide. This sector not only supports approximately 12.1 million jobs but also contributes around US\$ 1.9 trillion to the U.S. value-added GDP. Furthermore, CompTIA reports that there are over 557,000 software and IT service companies operating in the U.S. In Canada, the information and

communications technology (ICT) industry consists of more than 43,200 businesses, predominantly small enterprises, with around 35,500 employing fewer than ten people. The presence of numerous small and large companies in the IT sector is driving the demand for mainframe modernization services across the region.

In addition to the general IT growth, there is a notable increase in digitization within the healthcare sector. According to Canada Health Infoway, Canadians are increasingly adopting digital health services, with a survey indicating that 94% of Canadians expressed interest in accessing such services. This growing trend in digital healthcare is expected to further elevate the demand for mainframe modernization services among healthcare providers, enabling them to manage IT operations more effectively.

## **Strategic Insights**

### **Market Segmentation Analysis**

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

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 businesses to update their legacy systems.

2. **Enterprise Size:** The market is divided into large enterprises and small to medium-sized enterprises (SMEs). Large enterprises dominated the market share in 2023, as they often have more complex IT infrastructures that require modernization.

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 pace of technological advancement and the need for modernization in these sectors.

### **Market Outlook**

Digital technologies are reshaping various sectors, including communications, business, healthcare, education, and finance. The COVID-19 pandemic has accelerated the adoption of digital technologies, enhancing productivity and enabling many companies

to adapt to remote work environments. Cisco predicts that by 2024, approximately 75% of startups in Canada will adopt a digital-first strategy, with over 50% of SMEs restructuring their operations to embrace digital solutions. This shift towards digitalization is increasing the demand for robust IT infrastructures, thereby propelling the mainframe modernization services market. The ongoing evolution of digital technologies, coupled with rising customer expectations and disruptive market forces, is compelling organizations to prioritize digital transformation. This transformation necessitates the modernization and integration of existing applications and data into a diverse technology landscape, including both cloud and mainframe systems.

## Country Insights

The North America mainframe modernization services market is primarily composed of the U.S., Canada, and Mexico, with the U.S. holding the largest market share in 2023. The U.S. is experiencing a significant shift from onsite to remote work, with a Pew Research Center survey indicating that 35% of employees have jobs that can be performed remotely. Additionally, 59% of hybrid workers reported working from home three or more days a week. This trend towards remote work is driving companies to enhance their IT infrastructure, which is expected to further stimulate the demand for mainframe modernization services in the U.S.

## Company Profiles

Key players in the North America 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 their market presence.

## 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. NORTH AMERICA MAINFRAME MODERNIZATION SERVICES MARKET LANDSCAPE**

- 4.1 Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
  - 4.3.1 List of Vendors in the Value Chain

### **5. NORTH AMERICA 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. MAINFRAME MODERNIZATION SERVICES MARKET - NORTH AMERICA ANALYSIS**

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

### 6.2 North America Mainframe Modernization Services Market Forecast Analysis

## **7. NORTH AMERICA MAINFRAME MODERNIZATION SERVICES MARKET ANALYSIS - BY SERVICES**

### 7.1 Application Modernization

#### 7.1.1 Overview

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

### 7.2 Cloud Migration

#### 7.2.1 Overview

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

### 7.3 Data Modernization

#### 7.3.1 Overview

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

## **8. NORTH AMERICA MAINFRAME MODERNIZATION SERVICES MARKET ANALYSIS - BY ENTERPRISE SIZE**

### 8.1 Large Enterprises

#### 8.1.1 Overview

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

### 8.2 SMEs

#### 8.2.1 Overview

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

## **9. NORTH AMERICA MAINFRAME MODERNIZATION SERVICES MARKET ANALYSIS - BY END USE INDUSTRY**

### 9.1 IT and Telecom

#### 9.1.1 Overview

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

### 9.2 BFSI

#### 9.2.1 Overview

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

### 9.3 Healthcare

#### 9.3.1 Overview

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

### 9.4 Manufacturing

#### 9.4.1 Overview

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

### 9.5 Retail

#### 9.5.1 Overview

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

### 9.6 Education

#### 9.6.1 Overview

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

### 9.7 Others

#### 9.7.1 Overview

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

## **10. NORTH AMERICA MAINFRAME MODERNIZATION SERVICES MARKET - COUNTRY ANALYSIS**

### 10.1 North America

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

10.1.1.1 North America Mainframe Modernization Services Market - Revenue and Forecast Analysis - by Country

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

10.1.1.2.1 United States: North America Mainframe Modernization Services Market Share - by Services

10.1.1.2.2 United States: North America Mainframe Modernization Services Market Share - by Enterprise Size

10.1.1.2.3 United States: North America Mainframe Modernization Services Market Share - by End Use Industry

10.1.1.3 Canada: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.3.1 Canada: North America Mainframe Modernization Services Market Share - by Services

10.1.1.3.2 Canada: North America Mainframe Modernization Services Market Share - by Enterprise Size

10.1.1.3.3 Canada: North America Mainframe Modernization Services Market Share - by End Use Industry

10.1.1.4 Mexico: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.1.4.1 Mexico: North America Mainframe Modernization Services Market Share - by Services

10.1.1.4.2 Mexico: North America Mainframe Modernization Services Market Share - by Enterprise Size

10.1.1.4.3 Mexico: North America Mainframe Modernization Services Market Share - by End Use Industry

## **11. COMPETITIVE LANDSCAPE**

11.1 Heat Map Analysis by Key Players

11.2 Company Positioning & Concentration

## **12. INDUSTRY LANDSCAPE**

12.1 Overview

12.2 Market Initiative

12.3 Product Development

## 12.4 Mergers & Acquisitions

## **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 Web Services 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 Word Index
- 14.2 About The Insight Partners

## List Of Tables

### LIST OF TABLES

Table 1. North America Mainframe Modernization Services Market Segmentation

Table 2. List of Vendors

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Table 17. Company Positioning & Concentration

Table 18. List of Abbreviation

## List Of Figures

### LIST OF FIGURES

Figure 1. North America Mainframe Modernization Services Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. North America Mainframe Modernization Services Market - Key Market Dynamics

Figure 4. Impact Analysis of Drivers and Restraints

Figure 5. North America Mainframe Modernization Services Market Revenue (US\$ Million), 2021-2031

Figure 6. North America Mainframe Modernization Services Market Share (%) - by Services (2023 and 2031)

Figure 7. Application Modernization: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 8. Cloud Migration: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 9. Data Modernization: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 10. North America Mainframe Modernization Services Market Share (%) - by Enterprise Size (2023 and 2031)

Figure 11. Large Enterprises: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 12. SMEs: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 13. North America Mainframe Modernization Services Market Share (%) - by End Use Industry (2023 and 2031)

Figure 14. IT and Telecom: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

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

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

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

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

Figure 19. Education: North America Mainframe Modernization Services Market -

Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 20. Others: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 21. North America Mainframe Modernization Services Market Breakdown, by Key Countries, 2023 and 2031 (%)

Figure 22. United States: North America Mainframe Modernization Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

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

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

Figure 25. Heat Map Analysis by Key Players

## I would like to order

Product name: North America 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)

Product link: <https://marketpublishers.com/r/N3AB18905C2FEN.html>

Price: US\$ 3,450.00 (Single User License / Electronic Delivery)

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

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/N3AB18905C2FEN.html>