



# Mainframe Services PEAK Matrix<sup>®</sup> Assessment 2024

April 2024: Complimentary Abstract / Table of Contents



Cloud and Infrastructure Services



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- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
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# Introduction

Mainframe systems continue to be critical components of enterprise IT. They are still considered a strong choice for enterprises needing large processing capacities for high-volume transactions and will continue to form the back-bone of many medium-to-large enterprises in 2024 as well. However, as the pace of digital transformation mandates picks up, most enterprises are evaluating their mainframe systems for better optimization and compatibility with modern platforms and applications. Limitations around availability of skilled resources and rising costs are also influencing enterprise decisions in this regard. Enterprises are at crossroads with regards to their mainframes and are increasingly looking at ways to optimize, enhance, and modernize their mainframe workloads. Moreover, rise of Mainframe-as-a-service (MFaaS), AI and generative AI, rehosting offerings by technology providers and hyperscalers, and cloud native technologies have given a boost to enterprise mainframe optimization and modernization initiatives.

In this research, we present an assessment and detailed profiles of 17 mainframe service providers featured on the Mainframe Services PEAK Matrix®. Each provider profile offers a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2024, interactions with leading mainframe services providers, client reference checks, and an ongoing analysis of the mainframe services market.

**This report includes the profiles of the following 17 leading mainframe services providers featured on the Mainframe Services PEAK Matrix:**

- **Leaders:** DXC Technology, Ensono, Kyndryl, HCLTech, TCS, and Wipro
- **Major Contenders:** Accenture, Capgemini, Cognizant, Fujitsu, Infosys, LTIMindtree, Tech Mahindra, and UST
- **Aspirants:** Mphasis, T-Systems, and Unisys

## Scope of this report

**Geography:** Global

**Providers:** 17

**Services:** Mainframe services

# Overview and abbreviated summary of key messages

In this report, we present the assessment and detailed profiles of 17 service providers featured on the Mainframe Services PEAK Matrix® Assessment 2024. The assessment is based on Everest Group's annual RFI process for calendar year 2024, interactions with leading service providers, client reference checks, and an ongoing analysis of the mainframe services market.

## Some of the findings in this report, among others, are

### Everest Group Mainframe Services PEAK Matrix® Assessment

- This report includes the profiles of the following 17 leading service providers featured on the Mainframe Services PEAK Matrix:
  - **Leaders:** DXC Technology, Ensono, Kyndryl, HCLTech, TCS, and Wipro
  - **Major Contenders:** Accenture, Capgemini, Cognizant, Fujitsu, Infosys, LTIMindtree, Tech Mahindra, and UST
  - **Aspirants:** Mphasis, T-Systems, and Unisys

### Service provider characteristics

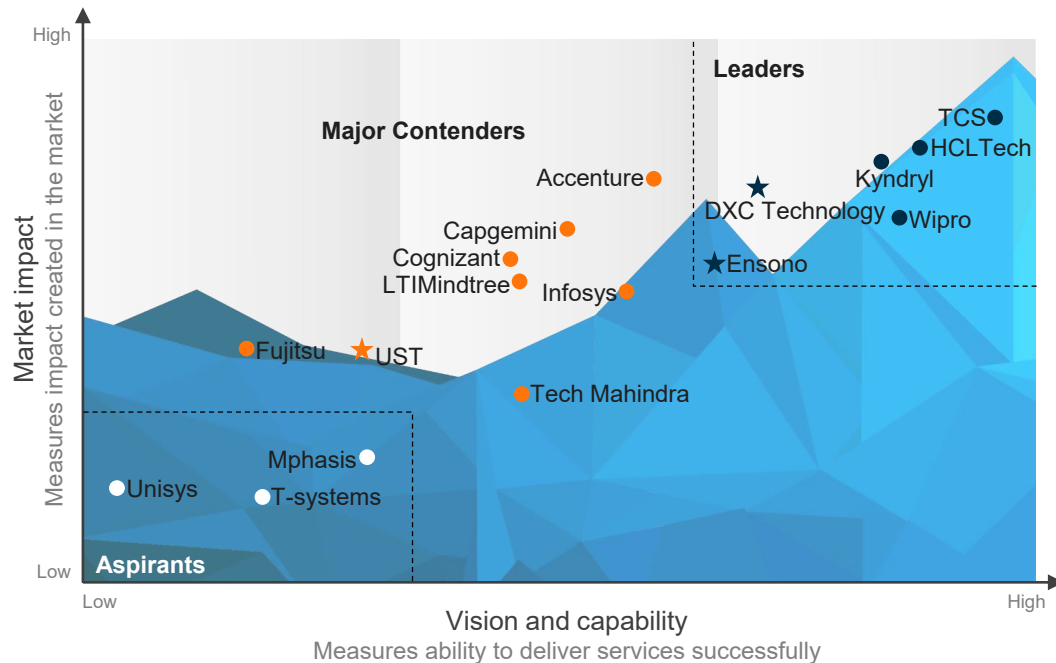
- Leaders continues to showcase high expertise for end-to-end mainframe service engagements with credible suite of IPs and solutions backed by robust delivery capabilities and skilled talent pool
- Major contenders are augmenting their broader mainframe capabilities with targeted investments in talent development, delivery capabilities, and partnership ecosystem, their end-to-end mainframe services capabilities continue to have some visible gaps
- Mainframe services capabilities of Aspirants show more gaps in the scope of mainframe services, maturity of internal IP, and coverage across industry verticals or geographies. However, they are expanding broader mainframe capabilities through investments in IP portfolios, niche platforms, and service and technology partnerships

# This study offers 17 distinct chapters providing a deep dive into key aspects of mainframe market; below are three charts to illustrate the depth of the report

## Everest Group PEAK Matrix® Assessment 2024

### Everest Group Mainframe Services PEAK Matrix® Assessment 2024<sup>1</sup>

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers



<sup>1</sup> Assessments for Accenture, Capgemini, Cognizant, Infosys, and Unisys excludes system integrator inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these system integrators, system integrator public disclosures, and Everest Group's interactions with buyers  
Source: Everest Group (2024)

## Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	●	●	●	●	○	○	○	○	○
Provider 2	●	○	●	●	○	○	○	○	○
Provider 3	●	●	●	●	○	○	○	○	○
Provider 4	○	○	●	●	○	○	○	○	○
Provider 5	●	●	●	●	○	○	○	○	○
Provider 6	○	○	●	○	○	○	○	○	○

## Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
○	●	●	●	○	○	○	○	○

### Strengths

- Provider 1, incorporates its mainframe-to-cloud modernization narrative into its overarching mainframe revitalization strategy and leverages its factory approach to automate migration of workloads
- It has robust proof points around transforming monolith mainframe applications into microservices architecture on cloud providing enterprises with flexibility and agility

### Limitations

- Provider 1 lacks comprehensive frameworks and tools to augment its consulting-led approach for mainframe service delivery
- It exhibits a gap in showcasing comprehensive proof points around IPs and assets leveraging next-generation capabilities for mainframe optimization and enhancement

# Research calendar

## Cloud and Infrastructure Services

	Published	Current release	Planned
Reports title	Release date		
Cloud Security Services PEAK Matrix® Assessment 2023			November 2023
FinOps for Enabling Value in Cloud: Unveiling the Top 10 Multi-cloud FinOps Visibility Tool Providers			December 2023
Secure Access Service Edge (SASE) Spotlight: Exploring the Top 10 SASE Technology Providers			December 2023
Accelerating Clients' Cloud Journeys: IT Services and Cloud Provider Partnerships to Drive Ecosystem Value			January 2024
Google Cloud Services Specialists PEAK Matrix® Assessment 2024			February 2024
<a href="#">Mainframe Services PEAK Matrix® Assessment 2024</a>			<a href="#">April 2024</a>
AWS Services Specialists PEAK Matrix® Assessment 2024			Q2 2024
FinOps Cloud Visibility Products PEAK Matrix® Assessment 2024			Q2 2024
Network Transformation and Managed Services PEAK Matrix Assessment 2024 – Communication Service Providers (CSPs)			Q2 2024
AI-led Network Transformation for Businesses			Q3 2024
Cost Optimization in the Hybrid Cloud World			Q3 2024
Hybrid Cloud Cost Optimization Services PEAK Matrix® Assessment 2024			Q3 2024
System Integration (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2024			Q3 2024
System Integration (SI) Capabilities on Microsoft Azure PEAK Matrix® Assessment 2024			Q3 2024

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