



Mainframe Services – Provider Compendium 2024

June 2024: Complimentary Abstract / Table of Contents

Provider Compendium
Cloud and Infrastructure Services



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- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
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- ▶ Retirement Technologies
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- ▶ Rewards and Recognition
- ▶ SAP Services
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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 gen 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. 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: Accenture, Capgemini, Cognizant, DXC Technology, Ensono, Fujitsu, HCLTech, Infosys, Kyndryl, LTIMindtree, Mphasis, T-Systems, TCS, Tech Mahindra, Unisys, UST, and Wipro

Scope of this report

Geography: Global

Industry: 17

Services: Mainframe services

Overview and abbreviated summary of key messages

In this report, we present the assessment and detailed profiles of 17 mainframe service providers. 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 continue 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

The Mainframe Services Provider Compendium 2024 report has 17 provider profiles

Provider 1 profile (page 1 of 5)
Overview

Vision for mainframe services
Provider 1's vision is to help its clients as the go-to partner for modernization. It is guided by the key principles of implementation simplification and modernization. It works toward delivering an experience and showcases a track record of successful delivery at scale, intricate legacy modernizations.

Overall mainframe services revenue (YTD 2023)

<US\$10 million	US\$10-100 million	US\$100-500 million
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Number of active clients for mainframe services

<20	20-50	50+
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Provider 1 profile (page 2 of 5)
Case studies

CASE STUDY 1
End-to-end mainframe services and mainframe rehosting
Client
A leading US-based financial services company

Business challenge
The client sought maintenance and enhancement of its mainframe operational expenditure. Due to regulatory compliance, the client needed functionality for one of its regional operations in Indonesia in an impacting operations

Solution
Service Provider was already managing the mainframe application end-to-end solution to isolate the required functionality from its client to the Micro Focus mainframe emulator on a distributed architecture. The customer and Micro Focus to find solutions for all the functional server product. It migrated the batch from the TWS scheduler to z/OS to Db2 LUW, and restored file transfer and MQ integration.

Impact

- Achieved a reduced project execution timeline of 18 months
- Reduced mainframe MIPS (Millions of Instructions Per Second) annually
- Fulfilled the regulatory mandate within the allotted time with

Provider 1 profile (page 3 of 5)
Solutions

Key Proprietary solutions (iPaaS/frameworks/accelerators/tools)

Solutions	Details
Solution 1	It is an integrated platform including documentation, migration, and conversion of mainframe code.
Solution 2	It is a partner tool that enables internal and external teams to collaborate on mainframe modernization.
Solution 3	This is an AI-first innovative internally developed and provided to clients.
Solution 4	This is a one-stop marketplace for industrialized methodology.
Solution 5	This is an AI and automation tool.

Provider 1 profile (page 4 of 5)
Partnerships

Partners	Details
Partner 1	Partnered for in-place modernization
Partner 2	Partnered to provide AWS
Partner 3	Partnered to provide cloud
Partner 4	Partnered to provide cloud the mainframe and Google
Partner 5	Partnered to provide cloud implement Oracle Tuxedo
Partner 6	Partnered for rehosting on on-premise private clouds
Partner 7	Partnered to enable client
Partner 8	Partnered to enable client
Partner 9	Partnered to automate the

Provider 1 profile (page 5 of 5)
Investments and recent activities

[REPRESENTATIVE LIST] [NOT EXHAUSTIVE]

Investments	Details
Acquisition	Acquired XYZ, to enhance services, Provider 1's mainframe modernization platform
Training	<ul style="list-style-type: none"> Trained N resources on mainframe modernization service Trained N resources in Micro Focus Cobol Trained resources on IBM Mainframe DevOps Trained resources on CloudFrame
Innovation	<ul style="list-style-type: none"> Set up legacy migration and modernization lab that combined the capabilities of Service Provider, AWS, and Micro Focus (OpenText) technology; equipped with COBOL rehosting platform from Micro Focus (OpenText) and DevOps tools from OpenText and AWS Invested in AI tools and accelerators to enhance and automate creation of retro-documentation and transform COBOL to Java based microservices. These include: <ul style="list-style-type: none"> XYZ: use case-driven knowledge portal with a "Ask-AI Anything" feature, powered by Gen-AI. It enables users to extract insightful answers from legacy code without the need for extensive browsing through technical reports XYZ: uses pattern recognition, clustering techniques, and Gen-AI to learn and generate blueprints of portable microservices from mainframe monolithic applications

Research calendar

Application 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
Mainframe Services PEAK Matrix® Assessment 2024			April 2024
Mainframe Services – Provider Compendium 2024			June 2024
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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