



Mainframe Services Enterprise Pulse 2024 – Top Three Providers Delivering Superior Value

September 2024: Complimentary Abstract / Table of Contents

Market Report
Cloud and Infrastructure Services



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- ▶ 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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- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
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- ▶ Supply Chain Management (SCM) Services
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- ▶ Technology Skills and Talent
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Background of the research

Mainframe systems remain essential to enterprises' IT strategies as they are considered a strong choice for enterprises needing large processing capacities for high volume transactions, forming a backbone for mid-to-large enterprise businesses

Despite the evolving landscape of technology and business dynamics, enterprises remain optimistic about the future of mainframe services in 2024, prioritizing value generation and operational efficiency. Enterprises look at service providers as strategic allies in navigating the complexities of mainframe technology evolution and ensuring a competitive edge in their respective industries

With an increasing demand for innovation and technical expertise, enterprises expect service providers to deliver tailored solutions and proactive support to meet their evolving needs, challenging providers to balance client expectations with resource constraints

Everest Group believes that it is crucial to gain comprehensive understanding of enterprises' experiences working with various service providers. This report aims to provide valuable insights into enterprise satisfaction with leading mainframe service providers, highlighting strengths and areas for improvement, and identifying top and emerging service providers in the realm of mainframe services, specifically across consulting and assessment services, modernization and transformation, and managed services

The assessment draws upon a dataset comprising over 60+ interviews with buyers of leading service providers conducted between 2023 and 2024 as part of the Mainframe Services PEAK Matrix® evaluation. These interviews offer a comprehensive understanding of the evolving landscape of mainframe services and the emerging players within it

Scope of this report

Geography: global

Industry: all industries

Services: Mainframe services

Providers: 17 global providers

Overview and abbreviated summary of key messages

In this report, we present the top 3 service providers featured on the Mainframe Services PEAK Matrix® Assessment 2024. The evaluation is based on Everest Group's analysis of buyer feedback data gathered from Mainframe Services PEAK Matrix® 2024 along with provider inputs, and insights from its proprietary database and year-round client interactions.

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

[Everest Group Mainframe Services Enterprise Pulse 2024](#)

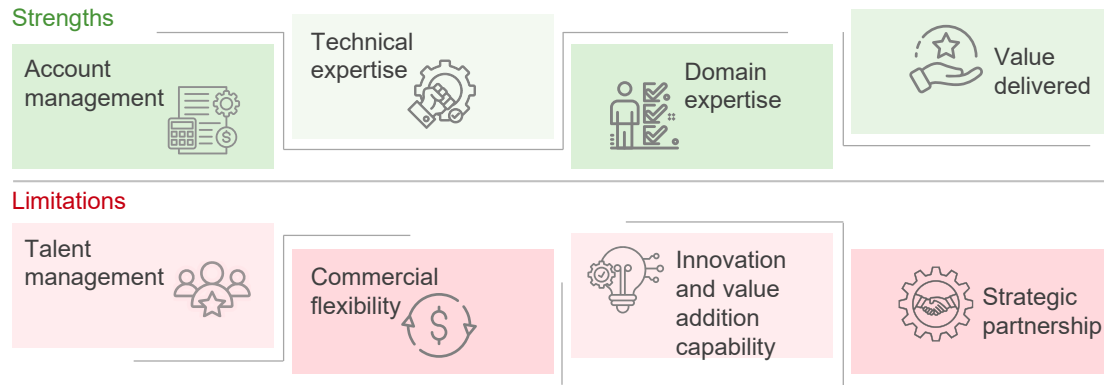
This report includes top three service providers across mainframe services delivering superior customer satisfaction and value: DXC Technology, HCLTech, and Kyndryl

[Evaluation criteria for assessment](#)

- Client satisfaction and ratings across dimensions like technical and domain expertise, resource management, and innovation. It also evaluates the likelihood of recommending the provider and plans for future engagement
- Complexity of the case study is evaluated based on the scope of services, geographical reach, and product range. It also considers the business outcomes, value delivered, and the impact of unique IP tools, partnerships, and CoE
- Reviewed platform-specific awards and recognitions for the service provider, including global and regional partner awards, industry-specific honors, and accolades for IP tools and solutions

This study offers 3 distinct chapters providing a deep dive into key aspects of mainframe market; below are four charts to illustrate the depth of the report

Service providers' strengths and limitations



Service providers assessed across the mainframe services market



Provider assessment criteria

Evaluation parameters	Evaluation criteria
<p>Buyer satisfaction</p>	<p>We conducted focused client reference discussions to understand the clients' perception with regards to:</p> <ul style="list-style-type: none"> Overall satisfaction and rating across dimensions such as technical expertise, domain expertise, resource and talent management, commercial flexibility, innovation and value addition, account management, and strategic partnership Likelihood to recommend the service provider's services to others and future engagement plan (please refer to page # 26 for a detailed questionnaire)
<p>Transformational proof points</p>	<p>We assessed the top 10-15 transformational case studies per provider across the below:</p> <ul style="list-style-type: none"> Complexity of the case study in terms of scope of services, geographical coverage, and product spectrum Overall business outcomes and values delivered to the enterprises Value delivered through differentiating IP tools/solutions, niche partnerships, CoE/labs, etc.
<p>Awards and recognitions</p>	<p>We analyzed platform-specific awards and recognitions received by the service provider from the respective technology provider, including:</p> <ul style="list-style-type: none"> Global and regional partner awards Industry-specific awards Awards for IP tools/solutions

Top three service providers across mainframe services

DXC TECHNOLOGY

DXC Technology has delivered superior customer satisfaction for mainframe services along with strong transformation proof points.

Clients have appreciated DXC Technology for its domain and technical expertise. They have also expressed high levels of satisfaction with regards to its client management capabilities.

HCLTech

HCLTech has emerged as a value-focused service provider delivering superior value to clients along with a strong positive market perception around its delivery capabilities for mainframe services.

Clients have appreciated HCLTech and have expressed high levels of satisfaction with regards to its strong technical capabilities and robust strategic partnerships.

kyndryl

Kyndryl has delivered superior customer satisfaction for mainframe services across its client portfolio with an enhanced focus on delivering value.

Clients have appreciated Kyndryl for its technical and domain expertise along with its client management capabilities. Clients have also expressed high levels of satisfaction with regards to its project management approach.

Research calendar

Cloud and Infrastructure Services

	Published	Current release	Planned
Reports title	Release date		
Cloud Services PEAK Matrix® Assessment 2023 – Europe			September 2023
Microsoft Azure Services State of the Market 2023: Catalyzing Enterprise Transformation with Azure Cloud Services			September 2023
Cloud Services Provider Compendium 2023 – North America			October 2023
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
Mainframe Solutions: Review of Broadcom's WatchTower Platform			July 2024
Mainframe Service Enterprise Pulse 2024 – Top 3 Providers Delivering Superior Value			September 2024
Mainframe Services State of the Market 2024			Q4 2024
AI-led Network Transformation for Businesses			Q4 2024
AWS Services PEAK Matrix® Assessment 2024			Q4 2024
Microsoft Azure Services PEAK Matrix® Assessment 2024			Q4 2024
Cloud and Infrastructure State of the Market 2024			Q4 2024

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