

Mainframes – Services and Solutions

A guide to extending mainframe capabilities and
modernizing applications to integrate cloud services



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Introduction

The mainframe market is undergoing a fundamental change as enterprises balance modernization with resilience. Cloud innovation is pushing organizations to reevaluate the way mainframes integrate with hybrid IT landscapes, with growing attention on seamless data access, software licensing optimization and use of middleware and third-party tools. Concurrently, cloud-native application development has become the new standard, driving enterprises to adopt microservices, APIs, containers, serverless computing and AI-driven engineering practices. These shifts are challenging established mainframe application management models and accelerating the demand for modernization strategies.

Generative AI (GenAI) has further transformed this environment. In the past year, it has redefined automation and application transformation approaches, impacting refactoring, replatforming, rehosting, rewriting and reengineering. Providers are increasingly embracing GenAI and AIOps to deliver self-healing systems, automated troubleshooting, reduced technical debt and rapid

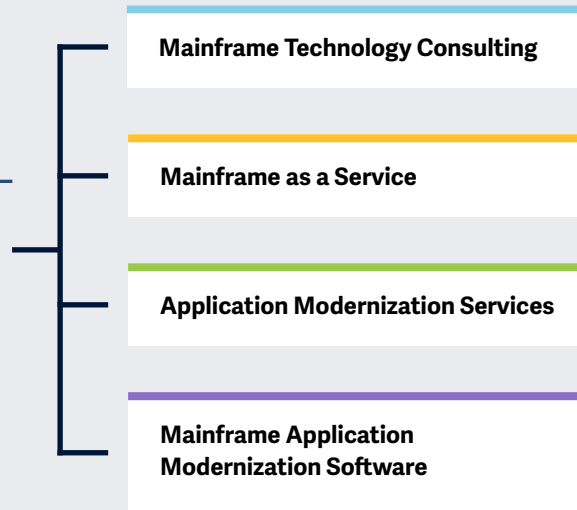
responsiveness to business change. These are also reshaping development workbenches and software engineering.

This study assesses providers offering mainframe consulting, mainframe as a service (MFaaS) and system integration services for modernization and migration. It also evaluates global vendors of automation and transformation tools for modernization. Organized into four quadrants, the report examines the way providers and vendors leverage GenAI and AI analytics, and take cloud-native approaches to improve quality, ensure cost efficiency, focus on innovation and achieve desired business outcomes.



Key focus areas for **Mainframes – Services and Solutions** 2026 study.

Simplified Illustration Source: ISG 2025



The ISG Provider Lens® Mainframes — Services and Solutions 2026 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including Global, Europe, the U.S. and the U.S. Public Sector. The U.S. Public Sector includes state and local governments and educational institutions, and excludes the federal government.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



Definition

Providers in this quadrant are consulting firms that specialize in supporting enterprises in maintaining, updating and integrating mainframe systems with their broad IT landscape. The services are typically project-based and include upgrading operating systems, middleware and application languages for secure, efficient and resilient operations. The providers also advise on lifecycle management, workload optimization and MIPS reduction to avoid obsolescence and extend the value of legacy investments for clients. They are also increasingly deploying advanced technologies such as AI, ML and AIOps for automation, self-healing and intelligent monitoring, and fostering adaptive development environments through DevOps, code repositories, AI assistants and automated testing in mainframe practices.

They further drive innovation by using GenAI to document legacy code, improve management and enable seamless integration with hybrid cloud and modern software delivery models.

Eligibility Criteria

1. Demonstrate **innovative client case studies** across IBM Z®, IBM iSeries/AS400, HP, Bull or Unisys mainframes
2. Hold **partner certifications** or authorizations to deploy new systems, middleware and upgrades
3. Showcase expertise in **updating application** languages and legacy codebases
4. Deploy **DevOps, AI and automation** within legacy programming environments to improve CI/CD practices
5. Deliver comprehensive portfolio, **workload and application assessments** as a part of client engagements
6. Provide clear **technology road maps**, covering innovation, testing and quality assurance tooling
7. **Enable hybrid cloud integration** by decoupling legacy codes and ensuring secure data access
8. Offer **advisory services** for future-state governance, compliance and lifecycle planning
9. Employ considerable **certified mainframe experts** with proven COBOL and mainframe system experience



Mainframe as a Service

Definition

This quadrant assesses providers delivering mainframe services through subscription-based models, including MFaaS, as well as traditional outsourcing approaches. In the MFaaS model, providers take complete responsibility for processing capacity, storage, infrastructure operations, security and ongoing maintenance, often embedding them in hybrid cloud environments. Other outsourcing models range from facility management to comprehensive services, covering system operations, middleware, monitoring, capacity planning, technical support, disaster recovery and staff augmentation.

The capability to bundle these services determines the breadth and attractiveness of a provider's portfolio, with MFaaS offerings representing the pinnacle of integration, automation and scalability. By outsourcing mainframe operations, enterprises transfer the responsibility and risk to the provider, reducing CapEx and predictable operating costs and allowing agile responses to business and market demands.

Eligibility Criteria

1. Deliver **full mainframe environments**, including facilities, hardware, connectivity, OS, subsystems, licensing and tools
2. Provide **professional services** and expertise to ensure availability and meet performance metrics
3. Operate secure, **high-availability data centers** with proven disaster recovery capabilities
4. Offer **automation** for job scheduling, batch processing, performance optimization and routine system operations
5. Ensure **regular patching, upgrades and security** updates for operating systems, middleware and applications
6. Provide **low-latency and carrier-neutral connections** in public cloud environments
7. Demonstrate **financial capacity to expand** and maintain mainframe operations at scale
8. Maintain structured **hiring and training programs** to secure the availability of future mainframe skills
9. Enable **client access to dashboards** with utilization data, performance indicators, chargeback and reporting



Application Modernization Services

Definition

This quadrant assesses providers specializing in transforming legacy mainframe applications and migrating them to the cloud. The providers partner with hyperscalers and software vendors to automate refactoring, data conversion and database replacement, ensuring applications remain secure, efficient and scalable. Application modernization involves automation, reengineering tools, emulators and compilers, and uses GenAI to accelerate code transformation and reduce manual effort. Vendor-neutral providers with broad language expertise are best positioned to deliver success across diverse legacy environments.

A comprehensive modernization program may include UI translation to replace green screens with intuitive, modern designs, improving overall UX. Modernization services break down monolithic applications into microservices, expose functionality through APIs and unify the application lifecycle with Agile practices, CI/CD, containerization, AI agents, and automated testing and quality assurance.

Eligibility Criteria

1. Ability to assess legacy applications to **provide application documentation**
2. **Deploy automation** for rewriting, reengineering, refactoring and rehosting applications (excludes providers that manually write new code)
3. Offer **application decoupling**, system architecture, data methods, API development and future-state application governance in services
4. Ability to offer phased transformation with **robust project management**, testing and quality assurance capabilities
5. **Foster agile development** and maintenance with CI/CD automation for enterprise clients
6. Demonstrate **expertise in modernizing legacy platforms** such as IBM Z®, IBM i HP, Cray, Fujitsu and Unisys mainframes
7. Offer support for **typical legacy applications** in COBOL, RPG, Easytrieve, PL/I, natural and other languages that traditionally run on mainframes



Mainframe Application Modernization Software

Definition

This quadrant evaluates vendors of specialized tools designed to automate code refactoring, rewriting and reengineering, easing the migration of mainframe applications to the cloud or x86 platforms. The solutions assure consistency and repeatability through established frameworks and libraries, with predictable outputs from identical inputs — a critical distinction from the variability of an LLM-generated code. Vendors here leverage GenAI to validate results, generate documents, automate testing and enhance their software engineering toolsets. Modernization extends to logic flows, data architectures, test artifacts, APIs, microservices and serverless functions, helping enterprises accelerate transformation and reduce risk of manual development.

Recent market changes show how GenAI is reshaping competition dynamics and vendor offerings.

This quadrant excludes generic LLM or coding assistants; qualifiers must deliver fully functional, production-ready applications with enterprise-grade support.

Eligibility Criteria

1. Offer a license or deliver software as a service to foster **client autonomy**
2. Specialize in mainframe-**specific tools** (excluding generic reengineering and code analysis)
3. Demonstrate **expertise in modernization methods** such as reverse engineering, business logic mapping, business rules extraction, code review and inspection, documentation, emulators, compilers, frameworks and application development tools to accelerate application code refactoring and modernization to cloud-native architectures.
4. Have offerings that have been **in use** among clients for longer than one year (excludes startup and lab tools)
5. Maintain a robust **support organization** or service partner ecosystem for enterprise-grade support
6. Offer **assessment tools and compilers** (excluding generic code conversion tools, business process management [BPM] tools or wide-scope server/cloud optimization tools)
7. Offer **products** that deliver fully functional applications that equal or have better capacity and performance than the converted legacy mainframe application; this excludes standalone code generators



Quadrants by Regions

As a part of the ISG Provider Lens® Mainframes – Services and Solutions 2026 study, we are introducing the following four quadrants:

Quadrant	Europe	U.S.	U.S. Public Sector	Global
Mainframe Technology Consulting	✓	✓	✓	
Mainframe as a Service	✓	✓	✓	
Application Modernization Services	✓	✓	✓	
Mainframe Application Modernization Software				✓



The research phase falls in the period between September and October 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in April 2026.

Milestones	Beginning	End
Survey Launch	September 29, 2025	
Survey Phase	September 29, 2025	October 29, 2025
Sneak Preview	February 2026	March 2026
Press Release & Publication	April 2026	

Please refer to the [ISG Provider Lens® 2025 research](#) agenda to view and download the list of other studies conducted by ISG Provider Lens®.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Mainframes – Services and Solutions IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com



ISG Star of Excellence



The ISG Provider Lens® 2025 – Mainframes — Services and Solutions research study analyzes the relevant software vendors/service providers in the Global, Europe, the U.S. and the U.S. Public Sector market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:

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The research and analysis presented in this study will include data from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars (\$US) unless noted.



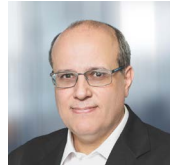
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ISG Provider Lens® Advisors Involvement Program

ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



**John
Schick**

**Principal
Consultant**



**Thorsten
Hoeltken**

**Principal
Consultant**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Accenture*	BMC*	DataKinetics	Gigaspaces
Adaptigent*	Broadcom	Datatek	GlassHouse Systems
Altimetrik (SLK Software)*	CANCOM	Deloitte*	Google*
Altoros	Capgemini*	Delphix	HCLTech*
Aspire Systems	CDW	DXC Technology*	Heirloom Computing*
Astadia (Amdocs)*	CGI*	Ensono*	Hexaware*
Atos*	CherryRoad Technologies	Epam	Hitachi Digital Services
Atruvia	CloudFrame*	Euristiq	Hostbridge
Avanade*	Coforge	EvolveWare*	HPE*
AveriSource*	Cognizant*	FIS	IBA Group
AWS*	Comarch	FNTS*	IBM*
BASE100*	Connectria	FreeSoft*	IKAN*
Beta Systems	Converge Technology Solutions	Fresche Solutions	Infinidat
Birlasoft	CPT Global*	Fujitsu*	Infinite
BlueHill Data Services*	DataBank	GFT*	Infosys*



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* Rated in previous iteration

INNOVA*	MacKinney Systems	NTT DATA*	Remain Software
Innova Solutions	Macro 4	Open Legacy	Rocket Software*
Ionate	MainLine Information Systems	OpenText*	Royal Cyber
Ishir	Maintec*	Oracle	RSM Partners (BMC)
Jumar	Mechanical Orchard	PalmDigitalZ	SCC
Karsun Solutions	Migrationware	Peraton	Sirius Computer Solutions
Keyhole Software	Miratech group	Persistent Systems	Software AG*
Keyinfo	mLogica*	PKS Software	Sonata Software
Kobee	Morphis Tech	Precisely	Sopra Steria
Kyndryl*	MOST Technologies*	Profi AG	SVA Software
LANSA	Move Solutions	PSR*	SysperTec
LRS	Mphasis*	QAT Global	TCC Software Solutions
LTIMindtree*	Natsoft	Qlik	TCS*
Luminex	NCS	Raincode*	Tech Mahindra*
LzLabs*	Nous Infosystems	Recovery Point Systems*	TierPoint



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* Rated in previous iteration

Tietoevry	vfunction
TmaxSoft*	Vicom Infinity
Tone Software	VioN Mfaas
TSRI*	Virtel (Syspertec Group)*
T-Systems*	VirtualZ Computing
Unisys*	Virtusa
Updraft*	Wipro*
UST*	Yash Technologies
V8.Tech	Zensar Technologies
Value-4IT	
Verang*	
Vertali	



Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this [webpage](#).

Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





SEPTEMBER, 2025

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