ISG Provider Lens®

Mainframes – Solutions

Mainframe Application Modernization Software

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

cloudframe

QUADRANT REPORT | MARCH 2026 | GLOBAL

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Executive Summary

Report Author: Pedro L. Bicudo Maschio

This research report examines the global market for mainframe application modernization software during a period when modernization has become a long-term operating reality rather than a one-time migration decision. Enterprises across regions are re-assessing how mainframes deliver resilience and regulatory compliance while integrating legacy assets with cloud-native environments to adapt to faster change, talent renewal and new business requirements. The analysis focuses on the software capabilities that enable this transition and on how enterprises evaluate, adopt and govern these tools in practice.

Market Context

Mainframe environments are structurally important to global enterprises, but the factors influencing their modernization have changed considerably. Economic pressure alone no longer drives modernization; instead, enterprises face a combination of workforce constraints, mainframe architectural limitations and increasing demand for speed, transparency and auditability. These forces have led to the adoption of software-led modernization approaches that can incrementally evolve mainframe applications without destabilizing core operations.

Across regions, modernization initiatives are increasingly framed as multi-year programs rather than discrete projects. This shift reflects the continued existence of mainframe workloads within regulated, mission-critical domains and recognizes that many organizations are not prioritizing complete replacement or rapid re-platforming. As a result, demand has shifted toward software platforms that support coexistence models, allowing organizations to selectively modernize legacy assets while continuing to run them in production.

Regulatory and compliance considerations reinforce this trend. Enterprises must demonstrate control, traceability and risk mitigation throughout modernization activities, particularly when changes

Mainframe modernization is shifting from migration tools to **governed, hybrid lifecycle platforms**

affect financial systems, citizen services or national infrastructure. Software tools that embed assessment, validation and rollback mechanisms directly into modernization workflows are, therefore, gaining structural relevance.

Technologically, GenAI has enabled advances in automation, dependency analysis and code writing, improving reliability and reducing manual intervention. These capabilities are being evaluated less on novelty and more on their ability to integrate into enterprise governance frameworks and existing delivery toolchains. The market context favors modernization software that supports disciplined change at scale, rather than tools optimized solely for speed.

Enterprise Priorities

Enterprises engaging with mainframe application modernization software are prioritizing risk-managed progress over disruptive transformation. The dominant requirement is not to eliminate mainframe systems, but to extend their viability while improving adaptability and maintainability.

Such requirements have translated into demand for tools that enable staged modernization paths and allow enterprises to choose different transformation patterns for various application segments.

A recurring priority is knowledge extraction and application dependency mapping. As experienced mainframe talent becomes scarcer, enterprises rely on software to reveal application logic, data flows and impact relationships that were previously maintained through institutional knowledge. Tools that automate assessment and provide explainable outputs are, therefore, crucial enablers of decision-making.

Governance and control have also moved to the forefront. Enterprises increasingly expect modernization software to support auditable workflows, approval checkpoints and test equivalence before production cutover. The need for documentation for traceability is particularly pronounced in the public sector and highly regulated industries, but the expectation is spreading globally as modernization programs scale.

Enterprises also emphasize hybrid integration readiness. Modernization efforts are expected to improve API exposure, interoperability and alignment with DevOps practices without requiring complete rewrites. Software that supports multiple modernization patterns within a single framework is preferred over point solutions tied to a single end state.

Key enterprise priorities shaping software evaluation include the following:

- Ability to modernize incrementally while maintaining operational continuity
- Automated assessment and dependency analysis to address talent gaps
- Built-in governance, testing and rollback mechanisms to reduce transformation risk
- Support for hybrid architecture and integration with modern delivery pipelines

Provider Dynamics

At the market level, the evolution of mainframe application modernization software reflects a clear move away from narrow tools toward more comprehensive platforms that encompass assessment, transformation and ongoing lifecycle management. Competitive differentiation is increasingly defined by how well these tools support disciplined modernization programs rather than isolated technical tasks.

Leading solutions demonstrate the ability to accommodate multiple modernization paths, such as re-hosting, re-platforming, selective re-factoring or API enablement, within a unified control framework. This flexibility aligns with enterprise demands for application-level decision-making instead of estate-wide mandates. Tools that enforce a single transformation outcome are increasingly viewed as misaligned with enterprise reality.

Another defining dynamic is the integration of agentic AI with human control. While AI agents accelerate analysis and code transformation, enterprises expect explicit validation stages, human approval points and traceable decision logs. Software platforms that balance AI automation with deterministic tools to ensure compliance and governance are consequently better positioned to support large-scale programs executed by vendors or their service partners.

Tooling ecosystems are also maturing. Modernization software is increasingly expected to leverage LLMs and integrate with testing frameworks, CI/CD pipelines and operational monitoring tools. This trend reflects a shift from project-centric modernization toward continuous evolution of mainframe applications as part of a broader hybrid environment.

Common gaps remain visible across the market, particularly where tools overpromise on automation but lack sufficient explainability or control. Enterprises are increasingly skeptical of black box approaches and prefer platforms that make modernization decisions verifiable, auditable and reversible.

Outlook

Over the next 12-24 months, the mainframe application modernization software market is expected to continue its transition toward platform-led, governance-first solutions. As modernization programs scale, enterprises will place even greater emphasis on repeatability, auditability and integration with enterprise delivery models.

A challenge for enterprises lies in estimating the operational and governance complexity associated with large-scale modernization. Tools that appear effective during pilot phases may encounter difficulties when applied across heterogeneous application portfolios without strong control mechanisms. Thus, enterprises should prioritize software evaluation criteria that emphasize long-term program execution rather than focusing on initial transformation success.

From a market perspective, solutions that enable service partners to implement modernization in a controlled, standardized manner will gain influence, even if differentiation remains at the software level. The ability of tools to support consistent delivery patterns across regions and regulatory environments will shape adoption decisions.

Overall, leadership in this market will be characterized less by transformational ambition and by the ability to support sustained, low-risk modernization as a permanent operating capability within complex enterprise environments.

Enterprises are increasingly assessing modernization software based on governance depth and transparency, rather than solely on the speed of code transformation.

Provider Positioning

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	Mainframe Application Modernization Software
Amdocs	Leader
Avanade	Product Challenger
AveriSource	Leader
AWS	Leader
BASE100	Product Challenger
CloudFrame	Rising Star ★
EvolveWare	Product Challenger
FreeSoft	Contender
Google	Leader

Provider Positioning

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	Mainframe Application Modernization Software
Heirloom Computing	Leader
IBM	Product Challenger
Karsun Solutions	Product Challenger
Kobee	Contender
LRS	Contender
mLogica	Leader
NTT DATA	Leader
PalmDigitalz	Product Challenger
Raincode	Contender

Provider Positioning

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	Mainframe Application Modernization Software
Rocket Software	Leader
TmaxSoft	Leader
TSRI	Leader
Updraft	Contender
Virtel	Contender
VirtualZ Computing	Contender

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

Simplified Illustration Source: ISG 2026

Mainframe Application Modernization Software

Definition

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 evaluates vendors of specialized software tools designed for mainframe application modernization. It focuses on solutions that automate code refactoring, rewriting and re-engineering to enable efficient migration to cloud-native or x86-based environments.

The report assesses how these vendors apply structured frameworks, automation and GenAI capabilities to improve consistency, accelerate transformation and reduce development risk. It also examines the extent to which solutions enhance application quality, scalability and performance while supporting enterprise-grade modernization outcomes.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following one quadrant for services/solutions: Mainframe Application Modernization Software.

This ISG Provider Lens® study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Mainframe Application Modernization Software

Who Should Read This Section

This report is valuable for vendors offering **mainframe application modernization software globally** to understand their market position and for enterprises looking to evaluate these vendors. In this quadrant, ISG highlights the current market positioning of these vendors based on the depth of their service offerings and market presence.

Chief information officers

Should read this report to assess the strengths and weaknesses of mainframe application modernization software vendors in terms of their offerings, delivery capabilities, market presence and deployment of the latest technologies. Understanding the mainframe market advancements is critical for IT executives to shape effective, future-proof modernization strategies and ensure their organizations maintain competitive agility and resilience.

Directors of infrastructure and operations

Should read this report to evaluate their enterprises' current and future IT infrastructure needs, enabling them to manage and design effective IT strategies. A mainframe application modernization engagement enables enterprises to create definitive objectives for sub-functions related to business units and define efficient procedures to determine mainframe budgets.

Sourcing, procurement and vendor management professionals

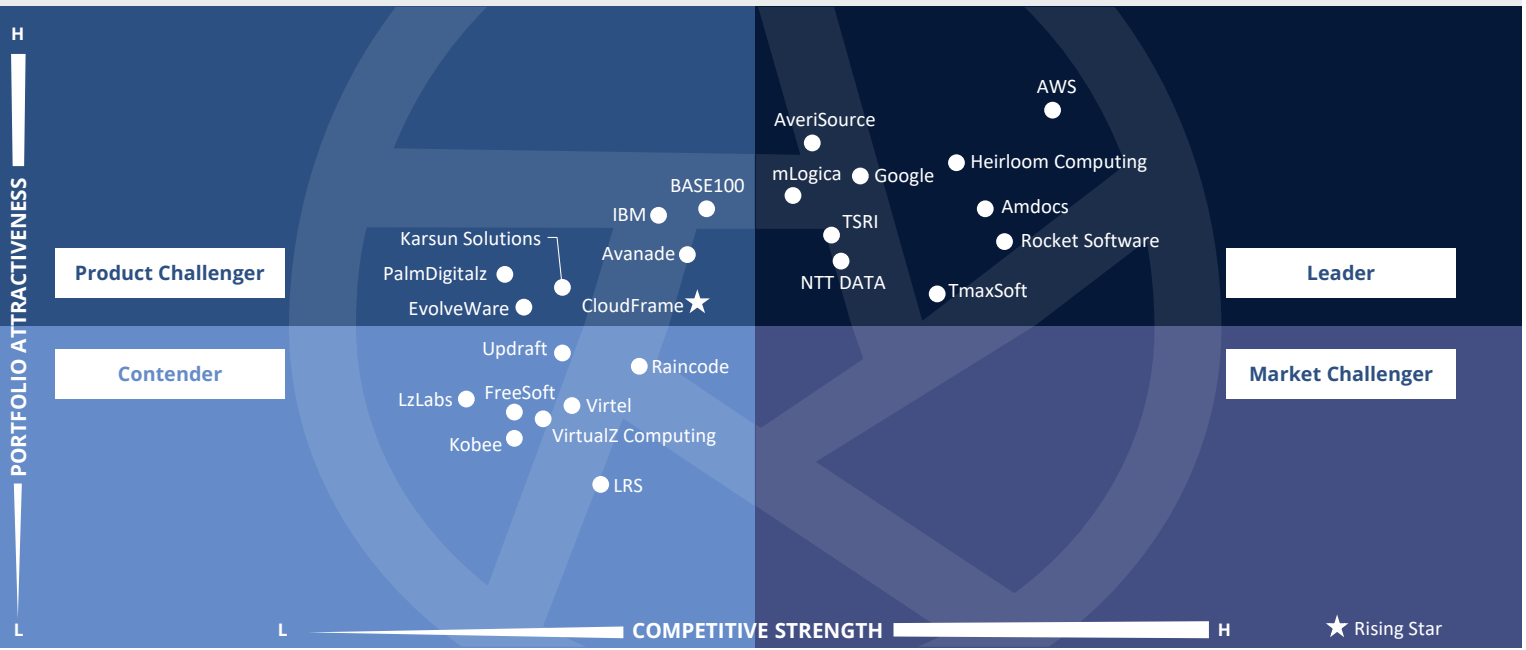
Should utilize this report to better understand the current landscape and partner ecosystem of mainframe application modernization software globally. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.

ISG Provider Lens®

Source: ISG RESEARCH

Mainframes — Solutions
Mainframe Application Modernization Software

Global 2026



This quadrant assesses **modernization software** vendors that **support clients globally** in transforming and **migrating mainframe applications** to the cloud through automation for rehosting, replatforming, reengineering and rewriting applications.

Pedro L. Bicudo Maschio

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 the 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

Observations

Across the U.S., the U.S. public sector and Europe, the global market for mainframe application modernization software continues to shift from isolated code conversion or re-factoring tools toward more comprehensive modernization platforms that support application assessment, transformation, testing and lifecycle governance. Buyers increasingly expect software solutions to enable incremental, low risk modernization paths, allowing mainframe assets to coexist with cloud native and distributed environments instead of forcing full-scale migrations. The observations consistently highlight that modernization initiatives are no longer driven primarily by cost take out, but by talent scarcity, operational resilience, regulatory requirements and the need for faster application change cycles. As a result, tools that support automation, dependency analysis and impact assessment across complex mainframe environments have become central to modernization programs, particularly where institutional knowledge is limited or approaching obsolescence.

Across all regions, there is a strong emphasis on hybrid modernization models, including re-hosting, re-platforming, selective re-factoring and API enablement, with software vendors differentiating themselves by their ability to support multiple modernization patterns within a single framework. Integration with DevOps pipelines, testing automation and support for modern programming languages and interfaces are increasingly viewed as baseline capabilities rather than differentiators.

Security, compliance and auditability remain especially prominent in regulated environments, with public sector buyers placing increased emphasis on traceability, documentation and controlled transformation processes. Similarly, buyers in Europe underscore the importance of alignment in governance and data protection, reinforcing the demand for software that supports structured, well-governed modernization rather than disruptive change.

Overall, the global quadrant observations indicate that the market is maturing, with modernization software emerging as a strategic enabler of long-term mainframe viability, not a short term exit mechanism. Software vendors that demonstrate depth across assessment, transformation and operational integration, while supporting phased and business-aligned modernization journeys, are better positioned to address the requirements of both enterprise and public sector clients.

From the 61 companies assessed for this study, 24 qualified for this quadrant, with 10 being Leaders and one Rising Star.

amdocs

Amdocs automates code refactoring, data migration and validation, test automation and DevOps-enabled delivery, supported by a structured modernization methodology and multicloud partnerships.

aVeriSource

AveriSource combines deterministic analysis with AI to automate refactor, replatform and reimagine paths across diverse legacy stacks, supported by structured delivery phases and designed to address complex modernization requirements.

aws

AWS provides a multi-pattern modernization portfolio centered around AWS Transform for mainframe, combining deterministic analysis and agentic AI with reverse or forward engineering, refactoring, reimagining and automated testing.

Google

Google provides automated assessments, AI-enabled code transformation with GenAI, deterministic refactoring, data integration and Dual Run, demonstrating disciplined capabilities for large-scale application modernization.

HEIRLOOM COMPUTING

Heirloom Computing delivers software and services that refactor mainframe applications to cloud-native Java using deterministic toolchains and agentic AI, supported by analysis, testing automation and partnerships for deployment across major clouds.

mLogica provides automated assessment to guide deterministic and GenAI-assisted refactoring of legacy code, data and middleware, enabling replatforming to cloud-native architectures with integrated testing and post-cut-off support.

NTT DATA offers a three-path portfolio, Mainframe in Place, Mainframe to Cloud and Mainframe Reimagined, powered by UniKix and GenAI, with certified hyperscaler integrations that enable code modernization and cloud-native transformation.

Rocket Software

Rocket Software offers low-risk replatforming of COBOL and PL/1, including tools for transaction processing, development, analysis and integration, with depth in automation, observability, compliance and hybrid orchestration.

TmaxSoft

TmaxSoft provides mainframe rehosting and refactoring with deterministic automation and AI-assisted conversion, broad language, dataset support and cloud marketplace delivery, providing scale to modernize complex legacy applications and data.

TSRI

TSRI offers a language-neutral automated modernization that integrates deterministic and GenAI methods for assessment, transformation and rich documentation. It delivers maintainable, cloud-ready code, along with training, multi-year support and a code warranty.

CloudFrame (Rising Star) differentiates by combining deterministic automation with agentic AI to generate clean Java code that preserves behavior and numeric precision. It enables incremental, risk-managed transitions, with explainable decisions.

Rising Star

"CloudFrame offers deterministic COBOL modernization with automated assessment, documentation, and controlled transformation into functional-equivalent Java. Its focus on verification and phased delivery enables predictable, low-risk transformations."

Pedro L. Bicudo Maschio

CloudFrame

Overview

CloudFrame, headquartered in New Jersey, U.S., delivers an enterprise application modernization platform, governing the complete lifecycle of legacy transformation, from system discovery to production readiness. Backed by a global team of engineers and modernization specialists, CloudFrame combines platform depth with disciplined enterprise delivery. Through a structured, governance-led approach, CloudFrame integrates AI acceleration with phased execution to deliver a fully validated transformation. This approach preserves functional equivalence, numeric precision and operational continuity, while enabling deployment across cloud, hybrid and on-premises environments.

Strengths

Execution across the full modernization lifecycle: CloudFrame delivers differentiation through a governed execution framework that brings together system understanding, modernization planning, deterministic transformation, built-in verification and production readiness. This approach ensures modernization is a controlled, end-to-end process rather than executed as isolated steps.

Production-oriented deterministic modernization: CloudFrame's core strength is deterministic transformation governed by embedded verification, enabling enterprises to confidently modernize by preserving functional equivalence, numeric precision and the integrity of business-critical operations. The modernization platform is designed for enterprises that require absolute accuracy, ensuring business logic, calculations and system behavior remain accurate in production environments.

Flexible delivery model for enterprise adoption: CloudFrame enables phased, controlled modernization, aligned with enterprise delivery models, including customer-led, internal, SI and hybrid approaches. Its flexible deployment model supports modernization across cloud, hybrid and on-premises environments, while maintaining governance over standards, sequencing and release readiness.

Caution

CloudFrame's strength is in governed modernization of COBOL-centric enterprise applications into functionally equivalent Java. For broad, multilingual modernization requirements or alternative target architectures, such as .NET or C#, enterprises may complement CloudFrame with partner technologies.

Appendix

The ISG Provider Lens® 2026 Mainframes – Solutions study analyzes the relevant software vendors in the Global markets, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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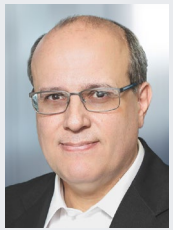
The research and analysis presented in this study will include data from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse 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.

The study was divided into the following steps:

1. Definition of Mainframes — Solutions market
2. Use of questionnaire-based surveys of providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Lead Author



Pedro Luís Bicudo Maschio

Distinguished Lead Author

Distinguished analyst and author, Pedro Maschio brings extensive experience in the research of the SEMEA (Southern Europe Middle East and Africa) and the Americas service markets. With more than 30 years of experience in sourcing, he has developed vendor assessments plus contract restructuring, services scope and IT benchmarking programs for diverse vertical markets in the Americas and APAC.

Before joining ISG, Pedro was a partner of TGT Consult and managing vice president at Gartner Inc., responsible for the consulting business in APAC and Latin America.

Research Analyst

Manoj M

Research Specialist

Manoj is a research analyst at ISG and supports ISG Provider Lens® studies on Private/Hybrid Cloud – Data Center Services, Mainframes and Public Cloud Data Center Solution and Services. He also supports the lead analysts of multiple regions in the research process. Prior to this role, he supported the ROI process in sales intelligence platform and was an individual contributor in handling research requirements for advanced technologies in different sectors. He has considerable expertise in predicting the automation impact by considering certain parameters such as productivity, efficiency and time reduction. During his tenure, he has supported research authors and authored Enterprise Context and Global Summary reports with market trends and insights.

Study Sponsor

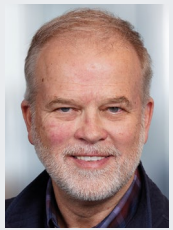
Heiko Henkes

Managing Director, ISG Provider Lens®

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG 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.

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ISG

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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.

ISG Provider Lens®

MARCH, 2026

REPORT: MAINFRAMES — SOLUTIONS