Everest Group®

Everest Group Modern Mainframe Services PEAK Matrix® Assessment 2026

Focus on Wipro

August 2026

PEAK MATRIX®

Introduction

Enterprises worldwide continue to rely on mainframes to support mission-critical workloads that require high levels of resilience, security, performance, and transaction integrity. As digital transformation priorities evolve, organizations are increasingly focused on improving the way they operate, optimize, rationalize, and extend their mainframe environments, while retaining core processing on the platform.

The modern mainframe services market is shifting beyond traditional infrastructure support toward a broader set of capabilities across consulting, managed operations, portfolio rationalization, platform extension, and mainframe application and platform enhancement. As cost, talent, resilience, and hybrid integration pressures intensify, enterprises require providers that can rationalize retained-mainframe estates, manage hosting and operations, improve performance and cost efficiency, and strengthen security and Disaster Recovery (DR) readiness.

Additionally, enterprise expectations are shifting from basic mainframe-to-cloud connectivity toward secure, governed integration across hybrid cloud environments. Providers are expected to expose core transactions, enable faster data access, and use adjacent runtimes such as Linux on Z, zCX, Java, and containers to extend capabilities without moving core workloads off the mainframe. They are also expected to apply DevSecOps, telemetry, and AIOps to monitor and optimize mainframe changes within the broader hybrid estate.

In this research, we present an assessment and detailed profiles of leading providers featured on the Modern Mainframe Services PEAK Matrix® Assessment 2026. The assessment is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2026, interactions with leading service providers, client reference checks, and ongoing analysis of the modern mainframe services market.

The full report includes the profiles of the following 17 leading modern mainframe providers featured on the Modern Mainframe Services PEAK Matrix® Assessment 2026:

- **Leaders:** DXC Technology, Ensono, IBM, Kyndryl, TCS, and Wipro
- **Major Contenders:** Atos, Cognizant, HCLTech, LTM, NTT DATA, Tech Mahindra, and Unisys
- **Aspirants:** CPT Global, Mphasis, Recovery Point Systems, and UST

Scope of this report

Geography: global

Industry: all

Services: modern mainframe services

Scope of the evaluation

Modern Mainframe Services help enterprises operate, optimize, and extend their mainframe environments by combining hosting, managed operations, cloud connectivity, automation, and in-place enhancement capabilities, without migrating workloads

Consulting and assessment

Services that help understand and optimize the mainframe estate

- Baselines the estate and maps workloads and dependencies
- Capacity and performance planning, security and DR readiness evaluation
- Evaluate operating model and run processes

Managed mainframe services

Services that host, maintain, and operate the mainframe environment

- Hosts the mainframe infrastructure (shared, dedicated, multi-tenant) and manages platform upkeep and resiliency
- Monitoring, incidents/changes, batch, performance, security
- Mainframe-as-a-Service (MFaaS): Consumption-based services
- L1/L2/L3 Support: application and infrastructure support

Platform extension services

Services that add new integration and runtime capabilities while keeping core processing on the mainframe

- API and event enablement for mainframe applications and data
- Secure hybrid and cloud connectivity with external environments
- Deploy modern runtimes and components such as zCX, Linux/Java, and upgraded logging/security modules

Mainframe enhancement services

Services that improve performance, resilience, and cost efficiency through tuning and automation

- MIPS optimization, tune workloads, storage optimization, and portfolio rationalization
- Automation and DevSecOps: CI/CD enablement, automated testing, AIOps-driven incident reduction, and runbook automation

Modern mainframe services enablers

Intelligent operations	AI-enabled insights
Capabilities that apply automation, analytics, and machine intelligence to mainframe operations to enable proactive monitoring, faster incident resolution, and self-healing	Capabilities that enable AI-driven insights and decisioning on mainframe data by supporting real-time inference, intelligent analytics

Modern Mainframe Services PEAK Matrix® characteristics

Leaders

DXC Technology, Ensono, IBM, Kyndryl, TCS, and Wipro

- Leaders operate at scale across retained mainframe estates and demonstrate a stronger ability to modernize the mainframe operating model through MIPS optimization, System z Integrated Information Processor (zIIP) exploitation, batch tuning, software-cost rationalization, DevOps-on-Z, AIOps, service automation, and knowledge continuity initiatives
- They show deeper hybrid-mainframe extension capabilities, enabling enterprises to expose core transactions, integrate mainframe data with cloud and analytics environments, support API/event-driven access, and improve observability without moving core workloads off the platform
- Leaders demonstrate the broadest capability depth. However, differentiation still varies in MFaaS and infrastructure-led operations, while others are stronger in automation-led estate intelligence, IBM Z modernization, or hybrid integration

Major Contenders

Atos, Cognizant, HCLTech, LTM, NTT DATA, Tech Mahindra, and Unisys

- Major Contenders demonstrate credible capabilities across selected areas such as retained-estate optimization, managed services, MFaaS/hosting, platform extension, AIOps, IBM Z advisory, ClearPath, and resiliency-led services
- Several providers show distinct pockets of strength, and their capabilities are increasingly shifting from steady-state support toward AI-enabled run, knowledge capture, automation-led enhancement, hybrid integration, and cost-transparent operating models; however, maturity and proof points remain uneven across providers
- They often show gaps in one or more areas such as provider-owned MFaaS scale, globally distributed delivery depth, platform-led IP, standardized consumption pricing, consulting-led operating model transformation, or repeatable production-scale AI outcomes

Aspirants

CPT Global, Mphasis, Recovery Point Systems, and UST

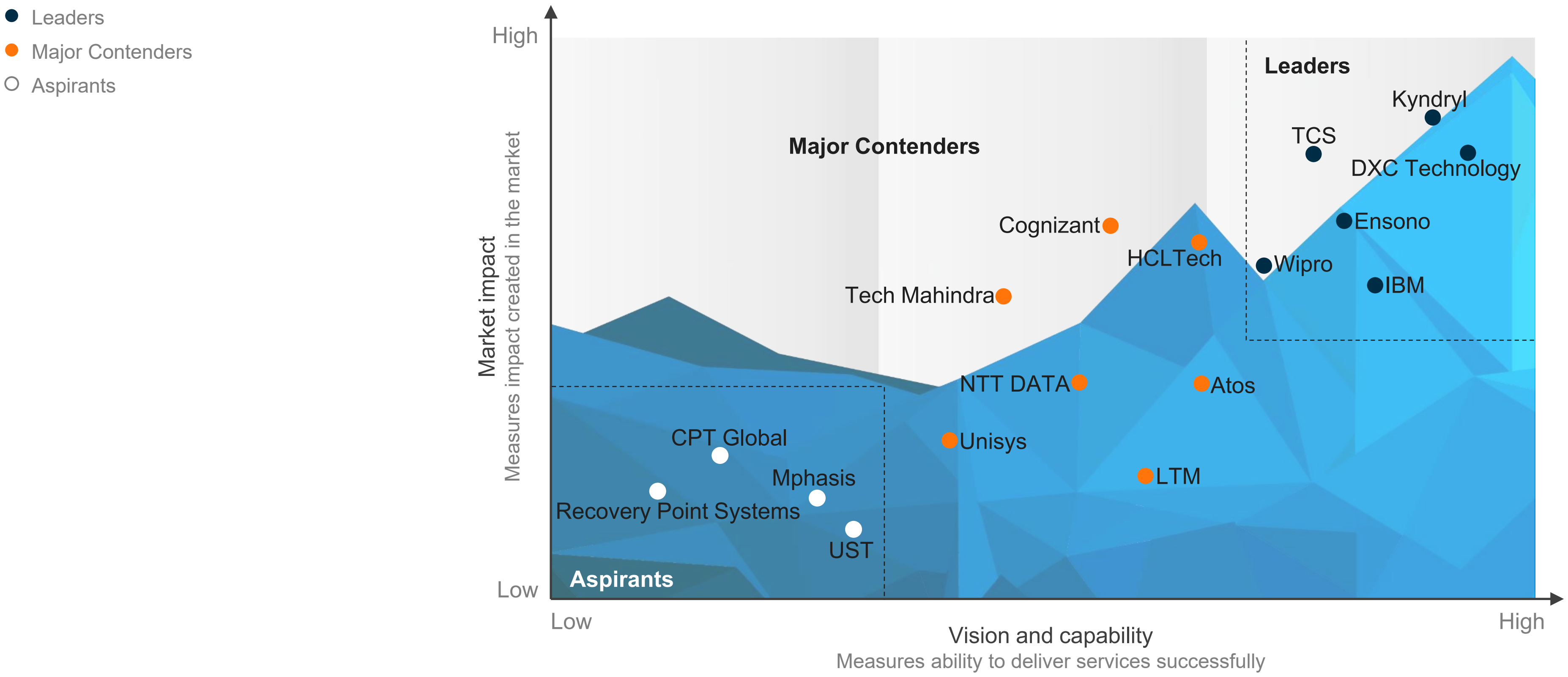
- Aspirants demonstrate focused strengths in specific modern mainframe areas such as cost diagnostics, Broadcom/software optimization, application support, platform extension, Disaster Recovery as a Service (DRaaS), cyber resiliency, AIOps-led support, and retained-estate enhancement
- They are often well suited for targeted engagements, and their capabilities remain narrower than Leaders and Major Contenders, with limited end-to-end depth across provider-owned MFaaS, hosted-mainframe operations, infrastructure support, batch, storage, DBA, system programming, DR, security administration, and enterprise-wide governance
- Variation in scalability, partner dependency, commercial flexibility, global delivery coverage, AI or automation maturity, and the ability to support complex, regulated, mission-critical mainframe environments under a single accountable model may limit their suitability for large-scale enterprises

PEAK MATRIX®

Everest Group PEAK Matrix®

Modern Mainframe Services PEAK Matrix® Assessment 2026 | Wipro is positioned as a Leader

Everest Group Modern Mainframe Services PEAK Matrix® Assessment 2026[1,2]



1 Assessments for Kyndryl, Mphasis and TCS exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
2 Analysis for IBM, Cognizant, NTT DATA, Unisys includes partial inputs from the service provider, and is based on Everest Group's estimates leveraging its proprietary data assets, service provider public disclosures, and interaction with buyers
Note: The source of all content is Everest Group unless otherwise specified
Source: Everest Group (2026)

Wipro

Everest Group assessment – Leader

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

- Wipro brings a strong cost and performance optimization proposition for retained mainframe estates through ModerniZ-led automation across MIPS reduction, batch optimization, zIIP exploitation, application performance management, testing, provisioning, and optimized operations
- Wipro's ecosystem alignment supports the hybrid extension of retained IBM Z workloads across in-place modernization and cloud-connected mainframe strategies
- Enterprises looking to retain and modernize IBM Z workloads can utilize Wipro's IBM + Wipro In-Place Modernization 2.0 approach, supported by Watsonx Code Assistant for Z and Wipro AI PEDIA
- Enterprises seeking AI-led run, optimize, and transition capabilities can leverage WINGS, which adds AI agents, knowledge capture, transition acceleration, and operational analytics

Limitations

- Enterprises requiring a strong differentiated consulting- or platform extension-led approach may need to assess fit, as Wipro's strength is more visible in managed services
- Wipro's provider-owned MFaaS and hosted-mainframe proposition appears less differentiated, with its hosting model positioned as partner-enabled rather than a provider-owned platform
- Production-scale gen AI and agentic AI outcomes in steady-state mainframe delivery require validation, as Wipro's AI-led benefits appear less visibly industrialized across engagements
- Wipro's retained-mainframe IP appears to be more accelerator suite-led than platform-led, requiring buyers to validate how consistently tools such as ModerniZ are integrated into a unified modern mainframe operating model

Market trends

Modern mainframe services are becoming more AI-enabled, platform-led, and hybrid-integrated, helping enterprises preserve mission-critical resilience while improving cost transparency, engineering velocity, and cloud interoperability

Market size and growth

- Enterprises are taking workload-led decisions to retain, optimize, extend, modernize in place, or selectively exit mainframe workloads
- The impact of AI is strongest in retained-mainframe application discovery and change support, especially documentation, dependency mapping, testing, RCA, and AIOps-led operations
- Modern mainframe delivery is becoming productized and platform-led through Mainframe as a Service (MFaaS), service catalogs, reusable IP, accelerators, and agentic tools

Key drivers for modern mainframe services

Cost transparency and self-funded modernization	Enterprises are prioritizing Million Instructions per Second (MIPS), batch, storage, and software/license optimization, including vendor rationalization, to reduce run costs and fund modernization initiatives.
Resilience-led platform modernization	Buyers are modernizing to make mission-critical platforms more secure, compliant, observable, and recovery-ready without disrupting always-on operations.
Talent and ecosystem-led scale	Mainframe talent scarcity is pushing providers to combine mainframe SMEs, cloud engineers, AI specialists, DevSecOps teams, and partner ecosystems into integrated delivery models.

Opportunities and challenges

Demand single-owner delivery and cost clarity	Single owner models reduce operational handoffs across hosting, DR, applications, and infrastructure while improving MFaaS economics, capacity visibility, and licensing governance.
Complexity beyond code conversion	Automated conversion is only part of the story. The harder challenge is handling dependencies, performance, transaction integrity, security, test coverage, data movement, and downstream integration.
Hybrid-mainframe extension	Enterprises are retaining core mainframe workloads while extending them into hybrid cloud, AI, data, and digital ecosystems through APIs, data pipelines, and unified observability.

Provider landscape analysis

Market share analysis of the Modern Mainframe Services providers profiled in the report[1,2,3]

1 Providers are listed alphabetically within each range
2 The market share estimate considers only the aggregate Modern Mainframe Services PEAK Matrix® revenue of the providers profiled in this assessment
3 The analysis and calculation of the above data has been done with respect to data as of December 31, 2025

Key buyer considerations

Enterprises seek modern mainframe partners that can keep mission-critical platforms resilient, cost-efficient, talent-ready, and connected to hybrid enterprise environments

Key sourcing criteria

Priority: High → Low

Cyber-resilient, compliant, always-on platform operations
Buyers prioritize providers that keep mission-critical workloads secure and available through SLA/CSL discipline, DR assurance, hardened controls, and audit-ready governance.

End-to-end accountable mainframe run model
Buyers value one accountable owner across applications, infrastructure, hosting/MFaaS, batch, storage, DBA, system programming, security, DR, and service management to reduce handoff risk.

Cost, capacity, and licensing transparency
They control run costs through cohosting options, usage and capacity visibility, MSU/MIPS optimization, software/license governance, and flexible commercials.

Talent continuity and knowledge transfer
They look at de-risking scarce skills through stable expert teams, domain knowledge, runbooks, structured documentation, cross-training, and certification-backed delivery.

Platform engineering and AI-enabled operations
Buyers want to extend mainframe value through DevOps-on-Z, API/data access, observability, ITSM/cloud integration, open tooling choices, and AI-led run efficiency.

Summary analysis

Modern mainframe buyers want providers that can run and extend the platform without compromising resilience. The strongest priorities are stable operations, DR readiness, compliance alignment, cost transparency, and continued support for mission-critical workloads.

Cost and talent pressures are shaping sourcing decisions. Buyers are looking for MFaaS/cohosting, capacity and licensing optimization, scarce skills continuity, system programming depth, DBA support, and stronger operational documentation.

AI and automation are gaining relevance, but as run-efficiency levers rather than primary buying drivers. Service providers must improve MTTR, recovery standardization, reporting, and decision support while reducing platform risk.

Key takeaways for buyers

Prioritize partners that can prove recoverability and operate mainframes as resilient, cost-transparent, skill-secure enterprise platform while extending them into hybrid IT and applying automation/AI to improve run outcomes

Prove recoverability, not just availability

Prioritize providers that can prove DR test success, RTO/RPO adherence, recovery plan currency, threat/vulnerability controls, and audit-ready evidence for critical workloads

Demand single owner delivery and cost clarity

Select partners that own hosting/MFaaS, DR, storage, batch, DBA, system programming, licensing, and app support under one governance model, with clear MSU/MIPS, capacity, and license reporting

Modernize the mainframe operating model

Choose providers that improve API/data access, cloud coexistence, observability, tooling upgrades, and hybrid upgrades while applying AI and automation

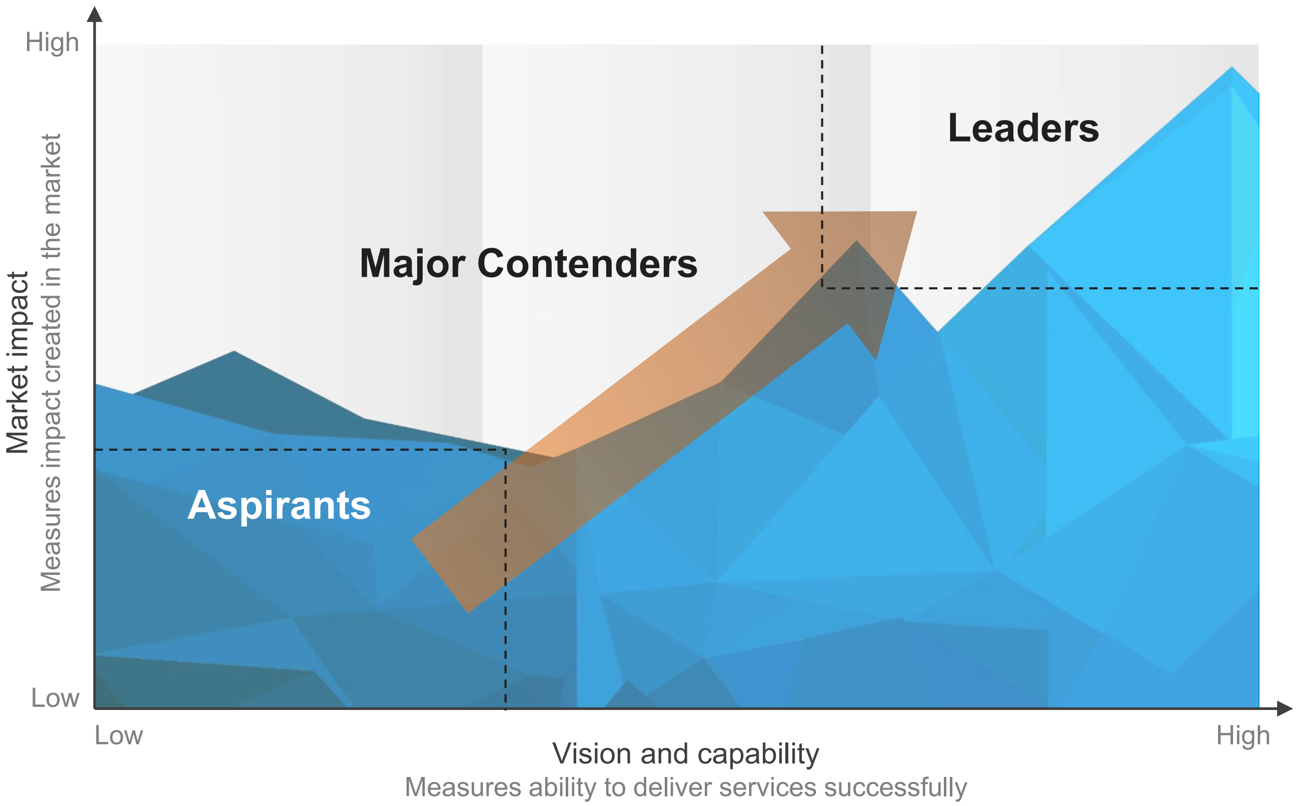
Appendix

PEAK Matrix® framework

FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



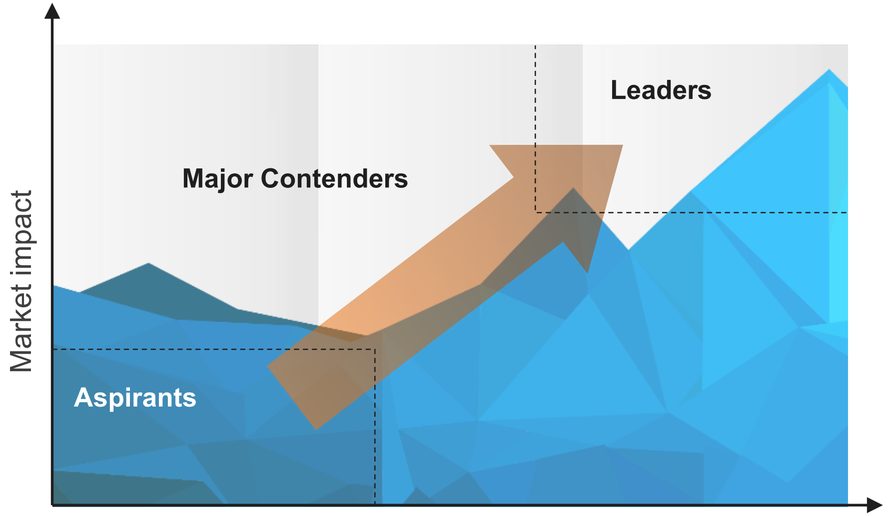
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact



Vision and capability

Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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