



# Mainframe Modernization Survey Report 2025

Industry focus: High-Tech

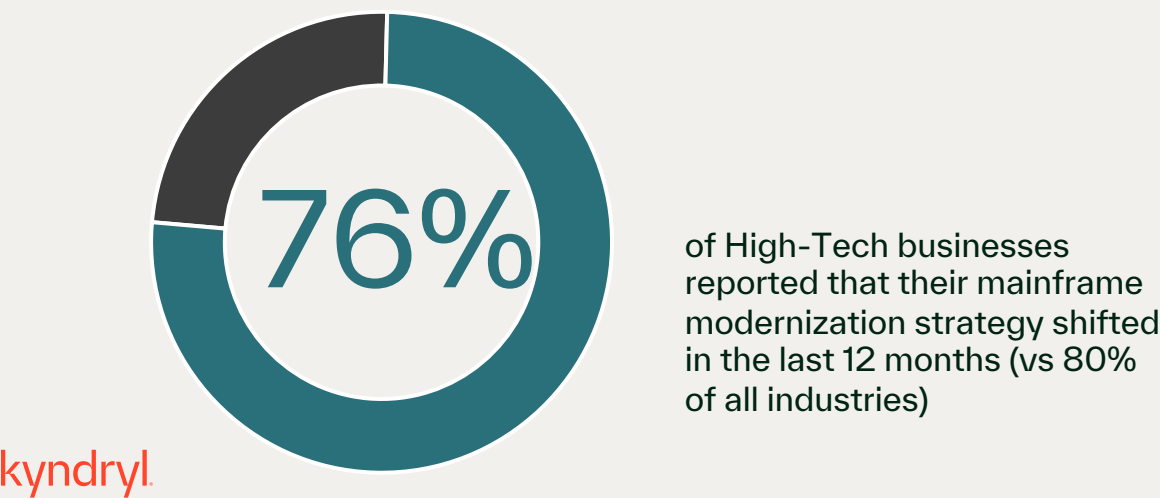


# How High-Tech companies are approaching mainframe modernization in 2025

Modernizing IT environments has never been more challenging – or more urgent.

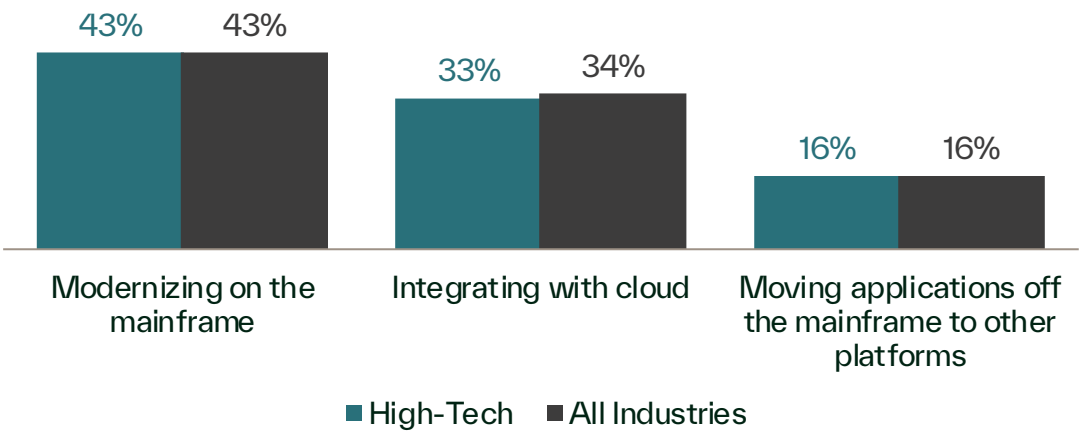
In 2025, Kyndryl commissioned Coleman Parkes Research to undertake the third annual global survey of 500 senior leaders at enterprises that make use of mainframes. The research found that while the mainframe continues to offer businesses a reliable, secure, and high-performance platform for their core operations, enterprises are dynamically adapting mainframe modernization strategies in response to changing market opportunities.

The evolving capabilities of the mainframe allow it to remain central to IT strategies. Organizations continue to accelerate and steer their evolution, opening up a wealth of new possibilities.



**FINDING 1**  
Businesses are embracing a surprisingly nimble approach to their modernization strategy

## HOW STRATEGIES HAVE CHANGED



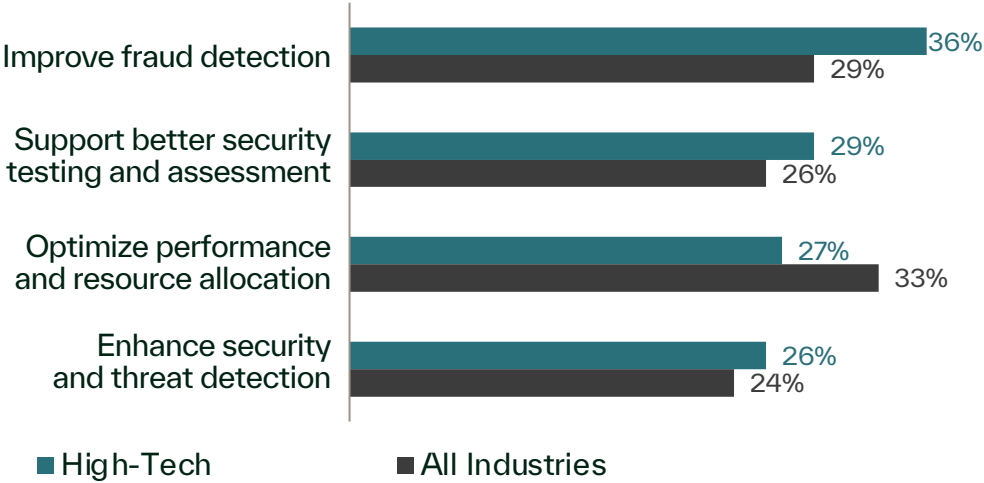
## ANNUAL EXPECTED SAVINGS FROM MODERNIZATION PROJECTS (HIGH-TECH ONLY)



FINDING 2

Deployment of AI and generative AI on the mainframe starts to pay off

TOP AI MAINFRAME USE CASES



\$59 million

Estimated revenue projected over the next three years from AI/gen AI initiatives (vs. \$44 million for all industries)

\$32 million

Projected savings (labor, operational, business) over the next three years from AI/gen AI initiatives (vs. \$29 million for all industries)

FINDING 3

The majority of businesses are increasing usage of the mainframe, despite respondents reporting a decline in the platform’s importance to overall strategy

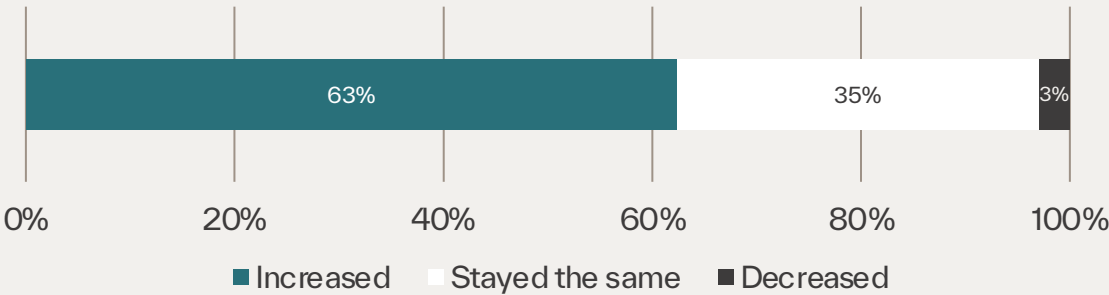
81%

of High-Tech organizations say mainframe is very or extremely important to their strategy and operations (vs 78% across all industries)

WHY HIGH-TECH BUSINESSES ARE KEEPING WORKLOADS ON THE MAINFRAME

- 1. Business criticality of the data (40%)
- 2. Information security concerns (38%)
- 3. Availability is better on the mainframe (38%)
- 4. Privacy and data protection concerns (29%)

MAINFRAME USE: LAST 12 MONTHS (HIGH-TECH ONLY)



FINDING 4

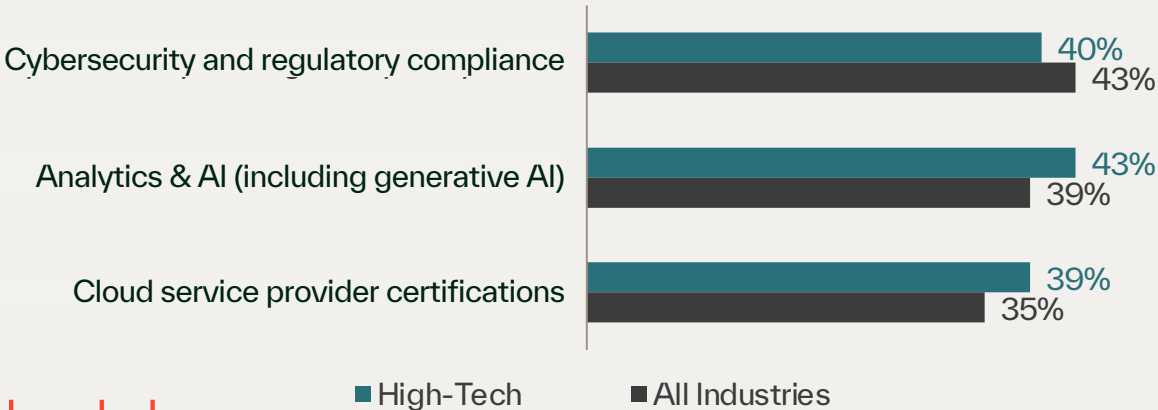
Mainframe modernization requires a multi-skilled organization

66% of High-Tech organizations **struggle to find skilled talent** for mainframe modernization projects (vs. 70% across all industries)

TOP CHALLENGES IN MAINTAINING A SKILLED WORKFORCE



MAIN SKILLS DEVELOPMENT INVESTMENTS



FINDING 5

Regulatory compliance requirements have an outsized influence on modernization plans and strategies, while security remains a top concern

91% of High-Tech organizations say regulatory compliance is influencing their organizations' decision-making regarding mainframe mod (vs. 94% of All Industries)

#1

High-Tech organizations say **security is the #1 key area** their organizations factor into their decision-making when developing a mainframe modernization strategy

HOW REGULATORY COMPLIANCE REQUIREMENTS INFLUENCE DECISION-MAKING

- 1. **Increasing collaboration** between IT, security, and compliance teams (51%)
- 2. **Driving investment** in robust security and resiliency measures (34%)
- 3. **Increasing the need** for stronger data protection protocols (25%)
- 4. **Re-prioritizing budget** to support regulatory compliance (25%)
- 5. **Shaping technology** selection criteria of 3rd parties (25%)

For more information on Kyndryl's work with High-Tech businesses, visit:  
<https://www.kyndryl.com/us/en/industries/communication-and-media>

To read Kyndryl's 2025 Mainframe Modernization Survey Report, scan the QR code



Two white lines in the top right corner of the page. One line starts near the top right and extends diagonally down and to the left. The other line starts further down and to the right and extends diagonally down and to the left, parallel to the first line.

© Copyright Kyndryl, Inc. 2025

Kyndryl is a trademark or a registered trademark of Kyndryl, Inc. in the United States and/or other countries. Other product and service names may be trademarks of Kyndryl, Inc. or other companies.

This document is current as of the initial date of publication and may be changed by Kyndryl at any time without notice. Not all offerings are available in every country in which Kyndryl operates. Kyndryl products and services are warranted according to the terms and conditions of the agreements under which they are provided.