

— INSTALLED BASE INTELLIGENCE SERIES

The Migration Wave

Mapping the enterprise technology transitions that will create B2B pipeline through 2030



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ABOUT THIS REPORT

This report consolidates published findings from Gartner, KLAS Research, Kyndryl, CloudBolt, the DSAG and ASUG user groups, and vendor lifecycle announcements, current as of October 2026. Every figure links to its original source.

EXECUTIVE SUMMARY

The short version

Six enterprise technology transitions will put tens of thousands of organizations into buying windows between now and 2033, and most of them haven't moved yet.

Unlike typical B2B demand, where only about 5% of buyers are in-market at any time, these waves run on published deadlines. That makes them the most predictable pipeline source in B2B technology, provided we know which organizations run the affected platforms.

~35,000

SAP ECC customers, only about 39% of which had licensed S/4HANA by end of 2024

86%

of North American VMware enterprises are reducing their footprint; only 4% have fully replaced it

Mar 2029

end of life for Atlassian Data Center, with last purchases in March 2028

Dec 2029

Dynamics GP product and tax updates end; security patches stop April 2031

65%

of Oracle Health hospital customers report they are leaving or considered vulnerable

98%

of mainframe organizations are moving at least some applications off the platform

Each wave pulls in systems integrators, hyperscalers, alternative vendors, MSPs, and adjacent ISVs. The teams that win map the affected installed base early, because firmographic data can't see which platform an account runs, and intent data only catches accounts once their research is public.

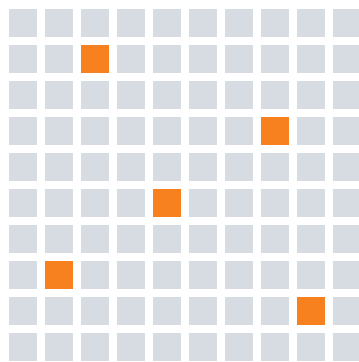
CHAPTER 01

Forced transitions are B2B's most predictable demand

01

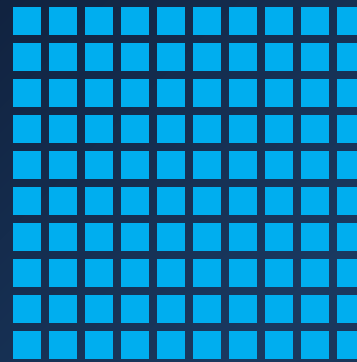
Most of the time, B2B demand is frustratingly hard to see. Research from the Ehrenberg-Bass Institute, popularized by LinkedIn's B2B Institute, found that [only about 5% of B2B buyers are in-market at any given time](#), while the other 95% won't buy for months or years. Buyers move themselves in-market, and no amount of outreach changes that clock.

NORMAL B2B DEMAND



Typical demand: about 5 in 100 accounts are in-market, scattered and invisible until they research.

DURING A MIGRATION WAVE



Every account on the affected platform faces a decision on a published timeline.

Forced technology transitions are the exception. When a vendor ends support, changes its licensing model, or retires a product line, it puts an entire installed base on a published timeline. Every organization running that technology now has a decision to make and a deadline it can't ignore.

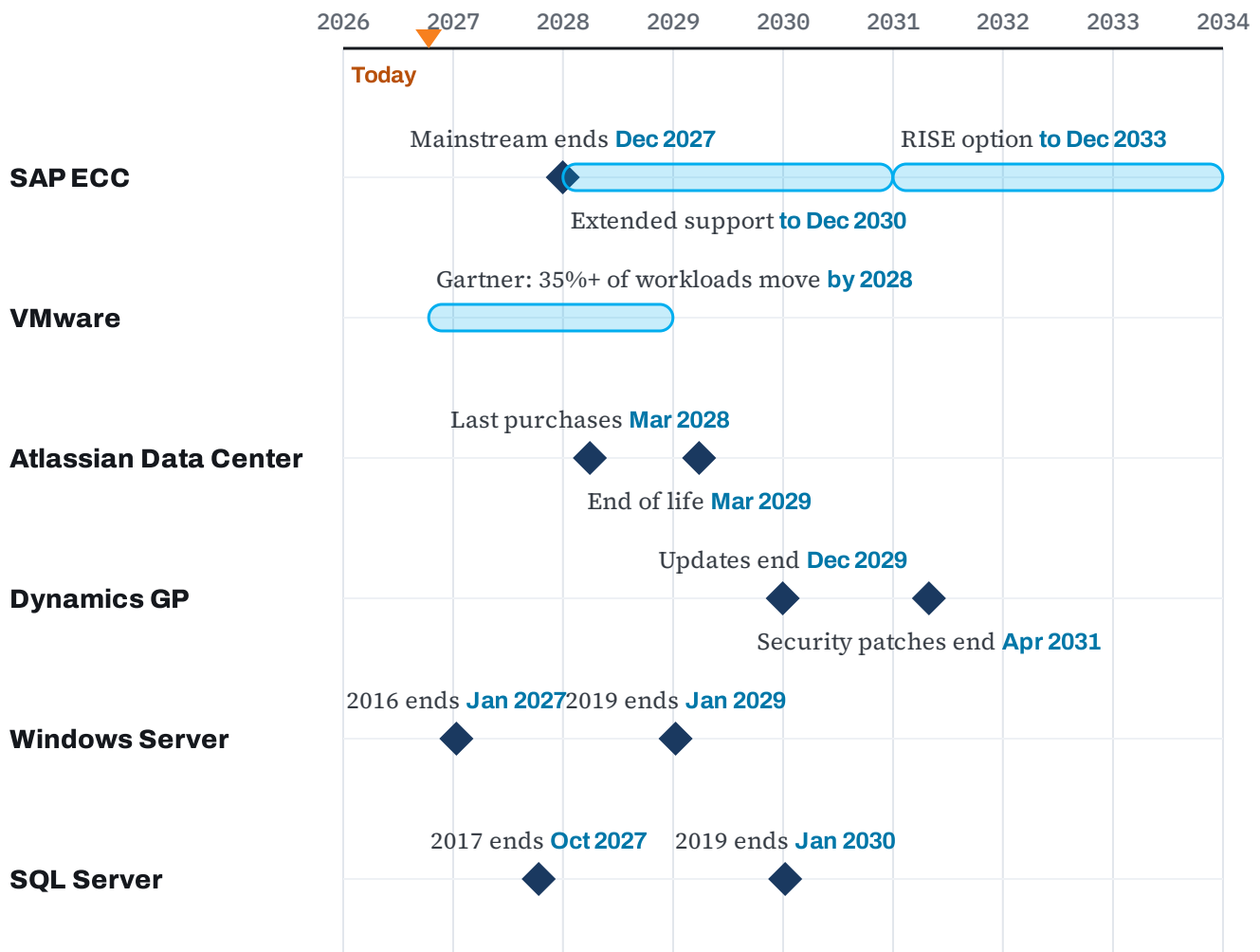
“ Installed base data turns a vendor's deadline into a target account list we can build pipeline against years before the RFP.

CHAPTER 02

02

The migration calendar

The hard deadlines cluster between 2027 and 2031, so the next four years carry the bulk of forced technology decisions in enterprise IT. SAP and Microsoft arrive first, Atlassian and Dynamics GP follow in 2028 and 2029, and SAP's transition option stretches demand out to 2033.



Hospital EHR: no vendor deadline, but a decision overhang as Oracle Health customers wait on its new platform.

Mainframe: no deadline at all, but a phased, multi-year move driven by skills, AI, and regulation.

WAVE 01

SAP ECC to S/4HANA

01

SAP ECC is the largest single migration wave in enterprise software, and it is nowhere near finished. Mainstream maintenance ends at the end of 2027, with [extended support until 2030 at a 2% premium](#). For customers on RISE with SAP, a [transition option runs to the end of 2033](#) if they commit to a migration plan first.

~35,000

ECC customers tracked by Gartner, [only about 39% of which had licensed S/4HANA](#) by the end of 2024

4 in 10

of today's ECC customers [will still use ECC](#) in key business areas by 2030

37%

of ECC users in [DSAG's 2026 survey](#) plan to switch by the end of 2027; almost half target 2030

In North America, ASUG reports that [68% of members are live on or moving to S/4HANA](#), which still leaves roughly a third yet to start. With a 2033 transition option on the table, this wave keeps generating demand long after the official deadline.

SIGNALS AN ACCOUNT IS MOVING

- S/4HANA licensing or RISE with SAP announcements
- Hiring for S/4HANA, BTP, or SAP data migration roles
- SI partner selection or new ERP program leadership

WHO BENEFITS

SAP implementation partners and SIs

RISE and hyperscaler partners

Data migration and testing vendors

Third-party support providers

Alternative ERP vendors

THE TARGETING QUESTION

Which of the ~35,000 ECC accounts fit our ICP, and which haven't committed to a path?

WAVE 02

02

VMware after Broadcom

VMware is the clearest example of a licensing change creating a slow, multi-year migration rather than a single deadline. Since Broadcom closed the acquisition in November 2023, the shift to subscription bundles has pushed nearly every customer to re-examine its virtualization strategy.

35%+

of VMware workloads will [run on another platform by 2028](#), Gartner predicts

86%

of North American enterprises are [reducing their VMware footprint](#), yet only 4% have fully replaced it

~40%

Gartner's [forecast for VMware's market share](#) by 2029, down from about 70% in 2024

Where workloads do move, [72% go to public cloud IaaS](#) rather than rival hypervisors, and Gartner cautions that a full migration [takes three years or more](#). Almost every account is reconsidering, very few have finished, and each renewal reopens the conversation.

SIGNALS AN ACCOUNT IS MOVING

- An upcoming VMware renewal or VCF bundle quote
- Hiring for Nutanix, Hyper-V, OpenShift, or cloud migration roles
- New hyperscaler commitments or migration programs

WHO BENEFITS

Hyperscalers and migration partners

Nutanix, Red Hat, Azure Local

MSPs and infrastructure consultancies

Backup, security, and observability vendors

THE TARGETING QUESTION

Which accounts run VMware today, how large is their footprint, and when does their renewal fall?

WAVE 03

Atlassian Data Center end of life

03

Atlassian has set one of the firmest deadlines on this list. [Self-managed Data Center products reach end of life on March 28, 2029](#), and new customers lost the ability to buy Data Center on March 30, 2026. Bitbucket and Jira Align are carved out; Jira, Confluence, and Jira Service Management are not.

Mar 28, 2029

end of life for Jira, Confluence, and JSM [Data Center](#)

Mar 30, 2028

the [last date](#) for existing customers to buy licenses, apps, or expansions

300,000+

Atlassian customers, [99% of which](#) already benefit from its cloud platform

The remaining Data Center base is small in count but heavy in value: large, complex, and regulated organizations that stayed self-managed on purpose. Every Data Center Marketplace app also stops working at end of life, so customers must re-select or replace the add-ons built around Jira and Confluence.

SIGNALS AN ACCOUNT IS MOVING

- Atlassian Cloud trials or Enterprise Cloud evaluations
- Hiring for Atlassian cloud migration or admin roles
- Reviews of Marketplace apps and ITSM tools

WHO BENEFITS

Atlassian Solution Partners

Marketplace vendors with cloud apps

Competing ITSM and work management platforms

Security and compliance tooling

THE TARGETING QUESTION

Which enterprise and regulated organizations still run Jira, Confluence, or JSM Data Center?

WAVE 04

Microsoft's on-premises cascade

04

Microsoft doesn't create one big wave; it creates a steady cascade of deadlines that hit the same on-premises estates again and again. Mid-market finance teams on Dynamics GP face the starkest one, and the infrastructure underneath is aging out at the same time.

Dec 31, 2029

Dynamics GP [product, tax, and technical support ends](#); security patches stop April 30, 2031

Jan 12, 2027

[extended support for Windows Server 2016 ends](#), per Microsoft

Oct 12, 2027

[SQL Server 2017 reaches end of support](#), after SQL Server 2016 ended July 14, 2026

Windows Server 2019 and SQL Server 2019 follow in [January 2029](#) and [January 2030](#). The deadlines compound: one Windows Server 2016 host running SQL Server 2016 is two end-of-support problems on one box, each forcing a choice between upgrading, moving to Azure, paying for Extended Security Updates, or replatforming.

SIGNALS AN ACCOUNT IS MOVING

- Business Central or alternative ERP evaluations
- Hiring for Azure migration, SQL upgrade, or ERP roles
- Purchases of Extended Security Updates

WHO BENEFITS

Microsoft partners and Dynamics resellers

NetSuite, Sage Intacct, Acumatica

Database and cloud migration specialists

Hyperscalers and MSPs

THE TARGETING QUESTION

Which accounts still run Dynamics GP, SQL Server 2016 or 2017, or Windows Server 2016?

WAVE 05

Hospital EHR and the Oracle Health question

05

The hospital EHR market is driven less by a vendor deadline than by a vendor at a crossroads. KLAS's 2026 report found [Epic added 77 hospitals in 2025 while Oracle Health shed 56](#), Oracle Health's third straight year of declining share.

43.7%

of acute care hospitals [now run Epic](#), covering 56.9% of beds

65%

of Oracle Health customers [report they are leaving or considered vulnerable](#), per KLAS

40%

[drop in hospitals](#) affected by EHR purchase decisions versus 2024, as many defer action

Most of this wave hasn't broken yet. Nearly a third of sampled Oracle Health customers say [it isn't part of their long-term plans](#), and KLAS calls 2026 a [pivotal proofpoint year](#) as Oracle rolls out its new AI-enabled EHR. Whoever already knows which hospitals are sitting on a decision will be first in the room when it breaks.

SIGNALS AN ACCOUNT IS MOVING

- Public EHR selection announcements or RFPs
- Hiring for Epic analysts or EHR transition roles
- Affiliation with a health system already on Epic

WHO BENEFITS

Epic and implementation partners

EHR consultancies and staffing firms

Data conversion and archiving vendors

Interoperability, RCM, and clinical AI vendors

THE TARGETING QUESTION

Which hospitals run Oracle Health Millennium or legacy MEDITECH, and which have signed elsewhere?

WAVE 06

Mainframe and legacy modernization

06

Mainframe modernization has no deadline at all, which is exactly why it is so often missed. Skills shortages, AI ambitions, and regulation are pushing a steady, phased migration that never makes headlines.

98%

of organizations are [moving at least some applications off the mainframe](#), an average of 28% of their apps

\$7.2M

[average modernization project cost](#) in 2025, down from \$9.1 million in 2024

70%

[struggle to hire staff](#) skilled in both mainframe and modern platforms

Kyndryl's 2025 survey of 500 leaders found [80% shifted their modernization strategy](#) in the past year, with reported returns of 288% to 362%. Its prior survey found [77% use external providers to deliver projects](#), and those estates are concentrated in banking, insurance, government, airlines, and large retailers.

SIGNALS AN ACCOUNT IS MOVING

- Hiring for COBOL, IBM Z, or modernization roles
- Hyperscaler mainframe program partnerships
- Core system replacement plans in annual reports

WHO BENEFITS

Modernization SIs and consultancies

Hyperscaler mainframe programs

Code conversion and AI refactoring vendors

Integration, API, and staffing providers

THE TARGETING QUESTION

Which organizations run IBM Z, COBOL, or legacy midrange, and which are hiring for modernization?

CHAPTER 03

What the waves have in common

03

Across all six waves, the same three patterns repeat, and together they explain why migration demand is so durable.

01 Deadlines slip, demand doesn't

SAP added a 2033 transition option, Microsoft pushed GP updates to the end of 2029, and VMware customers are moving in phases. Each wave stretches into years of pipeline instead of one rush.

02 Most of the base hasn't moved yet

The majority of ECC customers had no S/4HANA license at the end of 2024, 96% of VMware users haven't fully replaced it, and many Oracle Health hospitals are waiting on a decision.

03 Almost nobody migrates alone

Every wave pulls in integrators, cloud providers, data and testing specialists, and adjacent vendors whose integrations must follow the platform. That is why migration waves matter far beyond the platform vendors.

“ A migration wave is not a single buying moment. It is a multi-year sequence of decisions, each one an opening for the vendors who know where to look.

CHAPTER 04

Who wins in each wave

04

Migration waves matter to far more companies than the platform vendors themselves. If your company appears anywhere in the left column, at least one of these waves is a pipeline source you can plan against today.

WHO BENEFITS	SAP	VMware	Atlassian	Microsoft	EHR	Mainframe
Systems integrators and consultancies Assessment, migration, implementation	☒	☐	☒	☐	☒	☒
Hyperscalers and their partners Cloud capacity, funded migrations	☒	☒	☐	☒	☐	☒
Alternative platform vendors A landing spot for accounts that leave	☐	☒	☒	☒	☒	☐
MSPs and managed service providers Running the new or extended estate	☐	☒	☒	☒	☐	☐
Adjacent ISVs and add-on vendors Integrations, backup, security, apps	☒	☒	☒	☒	☒	☒
Data, testing, and archiving vendors Migration, validation, legacy archiving	☒	☐	☐	☒	☒	☒
Third-party support providers Extending the platform for waiters	☒	☐	☐	☒	☐	☐

☒ Strongest opportunity
☐ Smaller or indirect role

CHAPTER 05

Turning a wave into pipeline

05

The teams that win a migration wave map the installed base before the market gets crowded. Firmographic data can't see which platform an account runs, and intent data only lights up once an account researches publicly, usually late in its own timeline. By then, whoever reached out a year earlier is already on the shortlist.

1 Pick the wave and your role

Are you helping accounts migrate, replacing the platform, extending its life, or selling something that must be re-selected? Your role decides the message and the buyer.

2 Build the installed base audience

Identify every organization running the affected technology, then narrow it to accounts that fit your ICP by industry, size, region, and footprint.

3 Segment by migration stage

Separate accounts that haven't started, are evaluating, have committed, and have moved. New licenses, partner news, and job postings help place each one.

4 Time outreach to the milestones

Anchor campaigns to end of sale, last expansion dates, renewals, support deadlines, and fiscal planning windows.

5 Sequence by role

Give the platform owner the technical path, the business owner risk and outcomes, and finance the cost of waiting versus moving.

6 Refresh as the wave moves

Migrated accounts leave the displacement list and become expansion targets, so revalidate the audience before every major campaign.

Every step depends on knowing which accounts run the technology in question. Without that, a migration wave is just industry news. With it, the wave becomes a multi-year target account list.

CHAPTER 06

Segmenting the installed base by migration stage

06

An installed base audience is not one list. The same SAP ECC or VMware account needs a completely different message depending on where it sits in the wave, and sending a migration pitch to an account that already signed wastes the touch.

ACCOUNTS MOVE LEFT TO RIGHT AS THE WAVE PROGRESSES

Stage 1 Not started	Stage 2 Evaluating	Stage 3 Committed	Stage 4 Migrated
SIGNALS No new licenses or partner news; still on the legacy platform LEAD WITH Deadline risk, cost of waiting, and peer benchmarks REACH Business owner and finance	SIGNALS Modernization job postings, assessments, and research activity LEAD WITH Assessments, migration plans, and platform comparisons REACH Platform owner and architecture	SIGNALS New platform licenses, a partner selected, implementation hiring LEAD WITH Data migration, testing, add-ons, and staffing REACH Project leads and the PMO	SIGNALS Live on the new platform LEAD WITH Optimization, managed services, and expansion add-ons REACH Platform owner and operations

“ Revalidate stages before every campaign. In an active wave, a quarter is long enough for accounts to move a full stage.

CHAPTER 07

How Data InfoMetrix builds migration audiences

07

Data InfoMetrix specializes exclusively in Installed Base Data and Installed Base Intelligence, which makes migration waves our home ground. We research which organizations run the technologies at the center of each wave, align those accounts to your ICP, and deliver verified contacts across the roles that drive migration decisions.

CUSTOM AUDIENCES FOR THE WAVES IN THIS REPORT

- SAP ECC users

- VMware users

- Jira, Confluence, and JSM Data Center users

- Microsoft Dynamics GP users

- SQL Server and Windows Server users

- Oracle Health and MEDITECH hospitals

- IBM mainframe and midrange users

Built around your ICP

Custom-researched, never pulled from a fixed file

Sees the back office

ERP, on-premises, and EHR systems crawlers miss

Verified

Contacts checked before they reach your team

Get counts and a quote for your migration audience

Tell us which wave you're targeting and who you sell to. One of our experts will respond within one business day.

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FAQ

Frequently asked questions

What is a technology migration wave?

A period when a large installed base must decide what to do with a technology, usually because the vendor is ending support, changing licensing, or retiring a product. Every affected organization enters a buying window on a roughly known timeline.

How many SAP ECC customers still need to migrate?

Gartner tracks roughly 35,000 ECC customers, and only about 39% had licensed S/4HANA by the end of 2024. It expects four in ten to still use ECC in key areas in 2030.

When does Atlassian Data Center reach end of life?

March 28, 2029. New customers could no longer buy it from March 30, 2026, and existing customers can make last purchases and expansions until March 30, 2028.

How do I find companies still on these platforms?

Installed base data identifies organizations by the technologies they run. Data InfoMetrix builds custom audiences for each wave, aligned to your ICP and verified before delivery.

When does SAP ECC support end?

Mainstream maintenance ends at the end of 2027, with extended maintenance to the end of 2030 at a 2% premium. RISE customers can access a transition option from 2031 to the end of 2033.

Are VMware customers really leaving?

Gradually. 86% of North American enterprises are reducing their VMware footprint, but only 4% have fully replaced it. Gartner expects more than a third of workloads to move by 2028.

When does Dynamics GP support end?

Product updates, tax updates, and technical support end on December 31, 2029. Security patches continue until April 30, 2031.

Why not wait for intent data?

Intent only appears once an account researches publicly, often late in its decision. Installed base data shows the full affected base years earlier, before shortlists form.

REFERENCES

Sources

Every figure in this report links to the page it was taken from. Analyst figures reported through trade press are attributed to the original firm.

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NEXT STEP

Know who's in the wave before the market does.

Tell us which migration wave you're targeting. We'll build a researched, verified installed base audience of the accounts still on that platform.

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