Communications on Applied Nonlinear Analysis
ISSN: 1074-133X
Vol 32 No. 7s (2025)

A Phased Modernization Model for Migrating Legacy I-Series Applications to Cloud-Native Java Architectures

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Article History:

Received: 04-07-2025

Revised: 20-08-2025

Accepted: 06-09-2025

Abstract:
Enterprise systems developed on the IBM i (iSeries) platform still have a role to play in supporting mission-critical business processes across industries, but their structural inflexibility makes transformation to a cloud-native solution a big challenge. This review synthesizes existing methods for migrating such systems to cloud-native Java applications using phased modernization models, which allow progressive and risk-managed evolution. Key methodologies such as service decomposition, data migration strategies, and operational practices in accordance with microservices and DevOps ecosystems are critically discussed. Although architectural refactoring and adoption of microservices enhance the modularity, scalability and efficiency of deployment, successful transformation depends on the integration of data transition strategies, governance frameworks, and organizational maturity. The literature suggests that hybrid decomposition and phased migration are among the most promising approaches to the challenge of managing the complexity of tightly coupled legacy systems. Persistent challenges include reduced interoperability, aging codebases, limited refactoring support, a shrinking skilled workforce, and the lack of standard evaluation metrics and long-term empirical evidence. Emerging trends, including AI-assisted code transformation and data-driven modernization, represent promising future research directions.

Keywords: Legacy System Modernization; IBM i (iSeries); Cloud-Native Architecture; Microservices Migration; Java-Based Systems

1. Introduction

The continued presence of legacy enterprise systems remains a defining characteristic of broad organizational information systems particularly in banking, insurance, manufacturing, and government services. Among them, the IBM i platform (formerly AS/400 and iSeries) is one that still has the ability to sustain mission-critical operations since it is very dependable and has an embedded data format and extended stability. Although such benefits exist, the architectural rigidity of these systems has continued to clash with the current scalable needs, interoperability needs, rapid deployment requirements, thereby necessitating planned and orderly modernization [1] [2].

The global shift toward cloud computing has fundamentally reshaped software engineering by emphasizing elasticity, distributed processing in addition to service-based framework. This shift has accelerated the adoption of cloud-native architectures that incorporate microservices, containerization, CI/CD, and infrastructure as code [3], [4]. In this case, Java-based ecosystems, particularly platforms such as Spring Boot and Quarkus, have been gaining

traction due to the maturity, rich tooling and cloud provider interoperability [5], [6]. Consequently, the migration of legacy IBM i applications to the cloud-native Java systems has become a significant research and industrial challenge.

However, modernization is not merely a technical transformation but a complex socio-technical process involving codebases, data dependencies, organizational constraints and risk management factors. The legacy iSeries systems tend to have monolithic design, tightly coupled business logic, and programming languages, which include RPG and COBOL, which are not inherently aligned with modular architectural design [7], [8]. Also, such systems often lack effective documentation, and reverse engineering and refactoring processes are time-consuming and prone to errors [9]. Consequently, the direct migration methods like so-called 'lift-and-shift' approaches have been shown to be insufficient to deliver the full advantages of cloud-native paradigms [10].

A growing body of literature has examined approaches to legacy system modernization, such as rehosting, replatforming, refactoring, rearchitecting, and rebuilding. These approaches are often discussed within the so-called 6R migration framework as they offer a conceptual framework of transformation with little procedural direction in more complex environments like IBM i ecosystems [11], [12]. In addition, although microservices adoption and cloud-native transformations have been studied separately, limited emphasis has been placed on step-by-step migration models that combine legacy concerns with newer architectural objectives [13].

Phased modernization models have been proposed as a strategy to reduce risk while preserving business continuity. These models typically involve the gradual decomposition of monolithic systems, selective migration of components, and gradual implementation of cloud-native technologies. The Strangler Fig pattern and domain-driven design (DDD) as well as the API encapsulation techniques have been extensively mentioned as facilitating mechanisms for gradual transformation [14], [15]. Nevertheless, there exist some special concerns with their use on iSeries settings which include the need to maintain consistency between legacy and modern data systems, the correctness of the transactions and efficiency of hybrid systems at the expense of performance [16].

The other important property of modernization is data architecture. IBM i systems are often built around tightly coupled DB2 for i databases, where business rules are embedded not only in application code but also in database structures, stored procedures, triggers, and record-level access patterns. Although this design has historically supported reliability and transactional consistency, it becomes less effective in modernization contexts because it limits modular separation, makes independent service deployment difficult, and constrains interoperability with distributed cloud-native applications. Such database-centric coupling also complicates schema evolution, restricts technology flexibility, and makes it harder to implement microservices with independently owned data domains. As a result, modernization requires careful decoupling of legacy data dependencies through approaches such as API mediation, event-driven integration, and gradual data decomposition, although these introduce additional

challenges related to integrity, latency, and consistency in high-throughput transactional environments [17], [18].

Some of the factors influencing the modernization drive are skill availability, cost constraints, and organizational resistance to change. Legacy technologies contribute significantly to transformation challenges because organizations often face shortages of personnel experienced in IBM i architecture, legacy code maintenance, and platform-specific modernization practices, while simultaneously needing to retrain teams in cloud-native development patterns [19]. In addition, IBM i education has become relatively limited in comparison with mainstream software platforms; fewer academic programs, training providers, and online technical communities actively support IBM i-specific development and architecture. As a result, organizations frequently encounter difficulties in knowledge transfer, onboarding new developers, and sustaining long-term maintenance capabilities. Economic factors associated with large modernization projects must also be carefully prioritized, often leading to hybrid environments in which legacy and modern systems coexist for extended periods [20].

Recent advancements in the field of automation (analysis tools, model-driven engineering, refactoring with the assistance of AI, etc.) are proposing new opportunities that have offered the modern process of speeding up modernization with a new potential. These types of technologies permit transferring the code without manually coming up with the code, overlaying dependencies and creating tests without human intervention that would minimize the level of manual activity and increase the precision [21], [22]. Nevertheless, their suitability to highly customized and business-critical iSeries applications will be an open research question.

Despite the growing popularity of the legacy modernization and cloud-native transformation issue, the literature suffers a number of gaps. Firstly, there are no detailed frameworks that explicitly concern the staged transition of iSeries applications to the Java-based cloud-native systems. Second, empirical studies done to measure the performance, scalability and maintainability outcomes of such transformations are lacking. Third, the concept of organizational aspects combined with technical plans has not been properly researched, particularly when long-term sustainability and cost-efficiency are taken into consideration [23].

The gaps can be closed by the current review due to the critical and systematic examination of those methods of the modernization of legacy systems that currently exist in the current circumstances, specifically the process of the IBM iSeries applications migration onto the platforms of cloud-native Java. It is specifically interested in the models of gradual modernization in terms of which gradual change is possible but with the minimal risk of conducting operations. The review combines the knowledge of software engineering, cloud computing and enterprise architecture in an effort to establish a broad comprehension of the current trend and future.

The primary objective of this review is to evaluate the state of the art in phased modernization strategies and to determine the main technical, methodological, and organizational aspects that

can contribute to the successful migration. The review intends to make a contribution to the creation of valuable, scalable and sustainable modernization models applicable in complex legacy settings by merging and critically reviewing relevant literature.

2. Literature Review

The literature on legacy modernization has increasingly focused on migration between monolithic systems and microservices and cloud-native solutions. Recent mapping research reveals that the discipline has left behind its early advocacy of concepts and has developed a significant empirical dimension to it, but the evidence base is still divided by venue, area, and tradition of methods. Of specific concern, the migration stage per se has been the most discussed as compared to pre-migration evaluation, post-migration management, or long-term architectural development which is of much concern to IBM i modernization since iSeries estates are generally not viewed as consumable technical resources but as part and parcel of the ongoing organizational processes.

One of the similarities in the literature is that the migration path chosen has a great bearing on the development of modernization. Research on the topic of cloud-native transition does not allow a simplistic comparison of cloud adoption and application modernization. They instead distinguish between infrastructure relocation, platform alteration and architectural change, of which the latter is the one with biggest long-term returns to scalability, deployment independence and maintainability. This is also critical with legacy iSeries applications as the technical debt of those applications is not only sometimes technical assumptions of infrastructure, but also near-coupling of business logic, deep dependencies with the database, and interface conventions, accreted over decades.

Migration Strategy Patterns in the Literature

Phased migration is widely regarded in the modernization literature, and it is considered the least disruptive approach for business-critical systems. Instead of replacing an entire legacy portfolio simultaneously a number of studies propose incremental extraction of bounded capabilities, interface encapsulation as well as slow coexistence between the old and modern elements. Nordli et al. described a movement of monoliths to cloud-based microservices as SaaS and emphasized modularization and customer-oriented flexibility rather than wholesale reimplementation [25]. This is also in line with Tuusjarvi et al. who conducted a study examining the migration research field and discovered that the process-oriented and managerial contributions prevailed over the field as much as the code level tools mainly because success in transformation relies on sequencing, and the coordination and risk management within an organization [24]. These results are in line with the requirements of IBM i modernization where transaction continuity is generally non-negotiable.

The other prevailing body of work is with regard to architectural decomposition. Service identification is increasingly recognized as the principal technical bottleneck in the work of monolith-to-microservice migration in the literature. Instead of relying on intuition to derive services based on value and the already available modules more recent studies have suggested

formal or semi-formalized decomposition processes that are founded on a static code dependencies, runtime tracing, semantic framework or optimization goals. In [26], Santos et al. introduced an automatic method of identifying microservices, which is aimed at redesigning a monolithic system with a lower cost. Khoshnevis et al. made service extraction a multi-objective optimization task considering granularity and variability [27], whilst Li et al. suggested an automated identification process over structural modelling and system relations [33]. Taken collectively, these studies show that service boundary discovery is no longer regarded as a purely artisanal process, but full automation has not yet been achieved.

In the case of legacy iSeries programs, the decomposition literature is highly relevant but are only partially transferable. The source systems of most decomposition studies are either Java or more generally, they are object-oriented monoliths; however, IBM i applications often consist of a mix of ILE-based languages and platform-specific components, including RPGLE, CLLE, and CBLLE (ILE COBOL), together with DB2 for i data models, batch jobs, and interactive transaction flows. The available literature therefore provides useful conceptual guidance but little platform-specific validation. Such a gap is significant since different object-oriented decomposition assumptions often fail when core business processes are partitioned among screen programs, stored logic and job scheduling representations which were not originally allocated based on modern domain boundaries.

Evidence on Microservice Quality, Granularity, and Maintainability

A second theme of major significance is the implications of modernization in quality. The literature has a tendency to mention the expected modularity rise, deployment independence and scalability by the migration process, but these advantages are not automatic. The problem of defining and evaluating the microservice granularity is also addressed in the study by Vera-Rivera et al., and they note it to be an unresolved research question with serious implications on sustainability and performance [38]. Then, to define the metrics of architectural evolution in microservices in terms of static analysis, Abdelfattah et al. presented the measures of architectural evolution as an indicator of architectural evolution, in the broader sense of such statements implying the degree of structural quality [30]. Such a turn towards measurements is especially welcome in the case of phased modernization models since incremental migration needs to be re-assessed regularly as to whether any specific extracted service translates into observable reduction of coupling and into an increase in operational tractability.

Over-fragmentation is another concern highlighted in the literature. Search based techniques and clustering-based decomposition technique can produce technically separable services which are operationally inefficient or organizationally displaced. It is addressed by Khoshnevis et al. using explicit optimization of granularity, and by Maharjan et al. using more recent studies utilizing static code analysis and dependency graphs to perform decomposition [31]. Hassan et al. suggested a pattern-driven automation model of monolith-to-microservice transformation, and once again it is mainly emphasized that the difficulty lies not in the extraction, but in selecting the size of this extraction such that independent evolution is possible without introducing excessive coordination overhead [32]. These results tie directly to Java-target

modernization since cloud-native Java ecosystems are capable of providing very fine-grained services, but enterprise modernization tends to gain by moderately-coarse services that scale to reliable business functionality and not optimal disaggregation.

Data Architecture and Synchronization Challenges.

The literature reviewed shows that code decomposition is not enough as such. One of the major barriers to successful migration is still data coupling. Legacy applications often encode business rules in the database structure, triggers, and transaction sequence. Where microservice implementations are used, those assumptions need to be rephrased as service-owned state or asynchronous communication or shared data transition states that are carried out consciously. One such framework is a synchronization framework suggested by De Iasio et al. to build microservices which relates distributed transaction management and in which coordinating the state is especially challenging across independently deployed services [36]. In modernization environments, where legacy and modern components are forced to be used over a considerable duration such as is the case with phased replacement of an IBM i core, this difficulty becomes greater.

This is supported in the banking literature. Aydemir et al. have outlined a microservice-based core banking system with performance efficiency and domain separation as the focus of design issues [37]. Even though the source environment was not IBM i-specific, the study is applicable since banking modernization presents critical properties with iSeries estates such as strict consistency needs, large transaction rates, regulatory limits and low tolerance to downtimes. The literature thus proposes the idea of phased modernization models making data transition architecture as important as code refactoring and rather than as a downstream implementation detail such as persistence redesign.

Operational Maturity, Observability, and DevOps.

Modernization literature has developed the linkage of microservices migration by DevOps capability increasingly as compared to architecture. Waseem et al. surveyed the literature in microservices architecture studies in the DevOps sphere and demonstrated that delivery pipelines, deployment automation, testing, and operational feedback are vital to the practical usefulness of the architecture [34]. This view of operation has been extended more recently. Moreschini et al. conducted a review of AI techniques in the entire industry of microservices life cycle and selected 269 peer-reviewed publications between 2017 and 2023, structured into 16 research themes of quality attributes, AI-based approaches, and DevOps phases [29]. This literature suggests that it is an impossible task to consider modernization as successful when code is broken down and containerized; there must be mature observability, deployment governance, and adaptive operations before considering that it is a cloud-native target state.

Security has also emerged as a parallel concern. A controlled experiment was performed by Genfer et al. on security strategies in microservice APIs based on annotated decomposition models to depict that service decomposition choices have a direct impact on security reasoning and determinability [28]. This is relevant to the legacy modernization process since most

iSeries systems work off centralized trust assumptions and platform mediated controls which cannot be easily transposed into distributed Java services presented over APIs. Consequently, modernization frameworks which decompose solely with a functional focus against security architecture have the adverse effect of underestimating the complexity of migration.

Migration governance and decision-making.

Migration is coming to be a decision-intensive process instead of a single-path engineering phenomenon as noted in the literature. Reports on automated planning, decision models and migration frameworks all find their way into converging at the same issue - modernization is in need of the clear management of trade-offs between the minimization of coupling, the speed of delivery, cost of infrastructure, complexity of operations, and organizational preparedness. Legacy to Cloud Migration Horseshoe framework focused on migration planning through architecture as opposed to technology replacement per se [35]. Hassan et al. subsequently took this orientation further by a pattern-based framework of automated migration can guide a decomposition decision using patterns of architectural designs [32]. These articles substantiate the idea that a staged modernization plan to modernize IBM i environments must be regarded as a governance framework involving technical implementation phases, but not as a refactoring recipe.

Empirical literature on the subject also demonstrates that migration objectives are heterogeneous. There are those organizations that seek scalability or an expeditious deployment, and those that seek maintainability, autonomy of the team, or ability to customize flexibly. Nordli et al. paid academic attention to cloud-native SaaS customization [25], and Tuusjarvi et al. emphasized the overall managerial and organizational issues [24]. Such variety means that the criteria of success of modernization cannot be universalized. An implementation plan specific to iSeries applications will then have to start with the classification of the workload and with the intent to modernize, distinguishing, say, customer-related transactional modules, back-office intensive, integration, middleware, and reporting services

Table 1. Representative studies on legacy modernization toward microservices/cloud-native architectures

Ref.	Source system focus	Core method	Primary contribution	Relevance to phased IBM i → Java modernization
[24]	Legacy systems broadly	Systematic mapping study	Shows fragmentation of migration research; strong focus on transformation-phase studies	High: supports need for a structured phased model

[25]	Monolith to cloud-native SaaS	Migration approach/case-driven design	Demonstrates gradual migration for customizable cloud-native SaaS	High: useful for staged capability extraction
[26]	Monolith systems	Automatic service identification	Reduces redesign effort through microservice identification	High: informs boundary discovery
[27]	Legacy-to-microservice decomposition	Search-based optimization	Optimizes service granularity and variability	High: relevant to service sizing decisions
[28]	Microservice APIs	Controlled experiment	Evaluates security tactics using decomposition models	Medium-high: important for API-based exposure of legacy functions
[29]	Microservices life cycle	Systematic mapping study	Maps 269 papers and 16 AI-for-microservices themes	Medium: useful for automation and observability pathways
[30]	Evolving microservice systems	Static analysis metrics	Quantifies architectural evolution indicators	High: enables phased progress measurement
[31]	Monolith applications	Static code analysis + dependency graph	Automated decomposition case study	Medium-high: operationally relevant extraction workflow
[32]	Monolith-to-microservices	Pattern-based transformation framework	Automates migration using architectural patterns	High: strongly aligned with phased modernization
[33]	Legacy systems	Automated microservice identification	Structured method for deriving candidate services	High: complementary decomposition strategy
[34]	Microservices in DevOps	Systematic mapping study	Links architecture to CI/CD, testing, and operations	High: essential for cloud-native Java target state

[35]	Microservices broadly	State-of-the-art review	Consolidates challenges and research directions	Medium-high: useful conceptual baseline
[36]	Distributed microservices	Synchronization framework	Addresses coordination across services	High: critical for hybrid coexistence
[37]	Core banking modernization	Domain case study	Shows performance-oriented microservice design in high-stakes domain	High: analogous to transactional iSeries workloads
[38]	Microservice granularity	Systematic review	Clarifies granularity metrics and evaluation gaps	High: relevant to avoiding over-decomposition

Table 1 has revealed that the issue of migration path used by the legacy platform inventory to the cloud-native operating model is not thoroughly covered by any single study. Most of the research focuses on either part of the transformation issue: service identification, optimization of granularity, operationalization, or lifecycle automation. This fracturing is the reason why organizations tend to construct modernization projects consisting of a collection of various partially compatible frameworks, instead of adopting a recognizable end-to-end approach that has been validated. In the case of IBM i modernization, the connotation is that a publication-ready staged model should have a minimum of four strands of evidence, which are legacy assessment, service composition, data transition structure, and operational rule.

Table 2. Recurrent technical concerns reported across representative studies

Technical concern	**Typical evidence in literature**	**Consequence for modernization model**
Service boundary ambiguity	Frequent in decomposition and identification studies [26], [27], [31], [33], [38]	Requires iterative bounded-context discovery, not one-pass extraction
Granularity trade-offs	Highlighted in optimization and granularity reviews [27], [30], [38]	Migration should favour measurable cohesion/coupling improvement over maximum fragmentation
Data coupling and synchronization	Reported in synchronization and domain case studies [25], [36], [37]	Data transition architecture must be planned from the outset

Security redistribution	Evident in API-security and lifecycle studies [28], [29]	Security controls must move from platform-centric to service-centric models
DevOps dependence	Strongly emphasized in DevOps mappings [29], [34]	Java cloud-native migration must include CI/CD, observability, and deployment governance
Framework fragmentation	Explicitly reported in mapping studies [24], [29], [34]	A unified phased modernization model remains needed
Limited legacy-platform specificity	Most studies focus on generic monoliths, not IBM i estates [24], [25], [26]	Platform-specific adaptation is still an open research requirement

The literature also indicates that quantitative visualization can be utilized to explain the research focus development. Figure 1 will be included in the final copy in terms of the distribution of representative studies by the concern of primary modernization matters, and Figure 2 will overview the types of methodologies applied in reviewed studies.

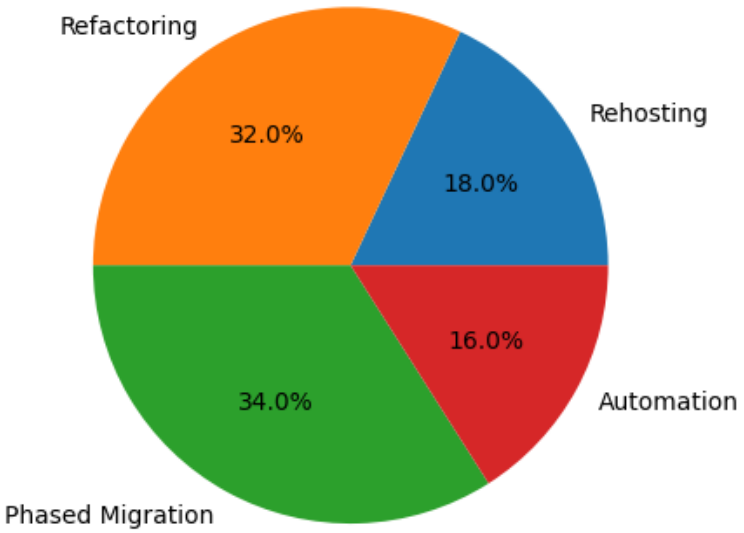

Figure 1: Proportion of different modernization strategies identified in the literature

Literature-Derived Gap Statement.

The reviewed evidence creates three gaps that can be identified. To begin with, existing literature gives significant backing to the concept of phased migration however it does not give many specifics to IBM i data related information and how to integrate the old transaction models, DB2 for i inference data and Java cloud-native target platform in a single tested modernization cycle. Second, the studies of decomposition have improved a lot, but most of the methods use a more structurally transparent set of the sources than real iSeries estates do.

Third, the operational literature demonstrates that the successful adoption of clouds is based on the deployment of DevOps, observability, security, and synchronization features, and they are frequently viewed as additional concerns of implementation rather than variables of activation in the design of migrations. These are the legitimate reasons why a dedicated phased modernization model is necessary, with a specific focus on the transformation of legacy portfolios of iSeries applications into cloud-native Java standards.

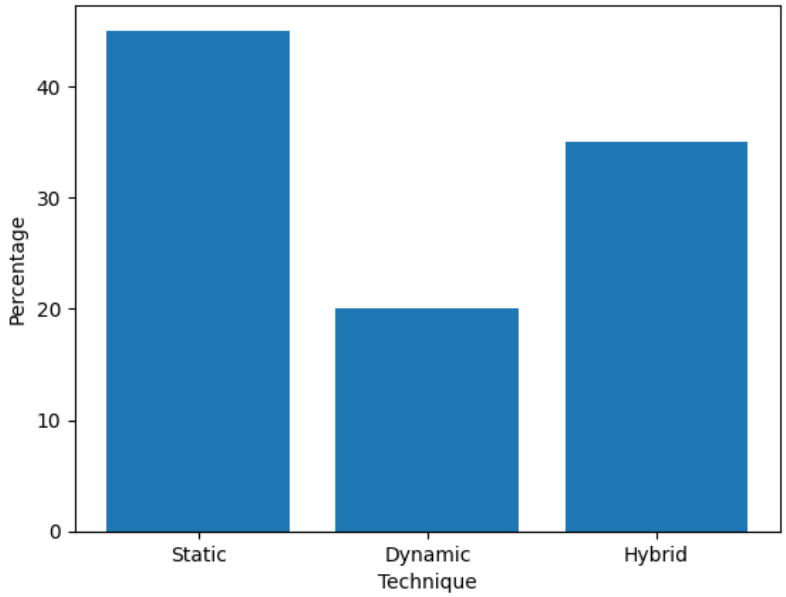

Figure 2: Relative usage of decomposition techniques across studies

3. Methodology

The methodological approach of this review is based on a structured critical analysis of peer-reviewed literature covering the issues of legacy system modernization, transformation to microservices, and cloud-native applications, with the specific focus on describing possible migration pathways that could be used in the context of IBM i (iSeries) systems. Both qualitative and quantitative experiences of the available studies have been combined in the review with emphasis on technical strategies, architectural practices, and operational practices, which apply to staged modernization.

A literature corpus was constructed using targeted keyword combinations that represent the intersections of legacy systems and cloud-native transformation. The primary search terms included ‘legacy system modernization’, monolith-to-microservices migration, monolith to microservices migration, cloud-native Java architecture, IBM i modernization, application refactoring, and microservices decomposition. These keywords were chosen to capture both foundational and emerging trends in the fields of software engineering, distributed systems and enterprise architecture. Only peer-reviewed journal articles and scholarly books that were published primarily between 2010 and 2025 were included in the search, to cover not only pioneering cloud migration frameworks but also up-to-date microservices research.

The studies considered during the review cover a wide range of methodological approaches, comprising systematic mapping studies, empirical case studies, controlled experiments, search-based optimization methods, code analysis (static and dynamic) and model-driven engineering. This reflects the multidisciplinary nature of this modernization research area, which encompasses the field of software architecture, data engineering, and organizational systems. High-level taxonomies of research themes as described by systematic mapping studies, including Tuusjarvi et al. [24] and Moreschini et al. [29] highlight the fragmentation of the field. The empirical case studies, such as those by Nordli et al. [25] and Aydemir et al. [37], provide context-dependent information on real-world migration challenges and performance outcomes. The quantitative data on the quality requirements in architecture and security implications are provided by controlled experiments and analytical studies, including Genfer et al. [28] and Abdelfattah et al. [30].

One critical approach to sources of methodology is that a large number of studies utilize source systems that are vastly different than those of IBM i environments. The majority of decomposition and migration methods are tested against object-oriented monoliths that have a clearer modular structure and better supporting metadata than their RPG/COBOL-based counterparts. Thus, although these techniques contain useful conceptualizations, they cannot be directly applied to iSeries applications. These differences suggest that the applicability of the results is limited, particularly in identification of services, dependency analysis and data extraction.

The technical tools and models employed in the literature can be generally divided into four areas: (i) code analysis and decomposition, (ii) architectural modelling, (iii) data migration and synchronization and (iv) operational automation. Code analysis methods include static dependency graphs, call graph analysis and clustering algorithms, which are used to define candidate microservices and measure the metrics of coupling [31], [33]. Behavioural dependencies also cannot be observed in static code structure, but some dynamic analysis techniques including runtime tracing and execution profiling are used to capture them [26]. They are frequently paired with optimization frameworks, including search-based algorithms, in finding a balance between conflicting goals, including cohesion, coupling, and service granularity [27].

Architectural modelling methods play a central role in modelling and analysing the system transformations. The legacy systems are then abstracted into intermediate representations by means of model-driven engineering techniques, which facilitate the automatic or semi-automatic conversion to a microservices infrastructure [32]. The principles of the domain-driven design (DDD) are commonly used to ensure that the boundaries of the services coincide with the business capabilities, though the use of the domain models in legacy environments is often dictated by the absence of explicit domain models. Moreover, other architectural patterns like Strangler Fig pattern and API gateway pattern are commonly cited as migration mechanisms and interface encapsulation [35].

Modernization studies include data-related methodologies as an important part. Legacy systems are often tightly coupled at the levels of application logic and database schema, making data extraction, transformation, and synchronization highly complex. Database refactoring techniques (including schema decomposition, event-driven data propagation, etc.) are also an active form of discussion in the literature [36]. Newly suggested distributed data management models and systems, such as eventual consistency and event sourcing are often theorized in opposition to the traditional transactional systems, yet their adoption comes at a trade-off in consistency guarantees and system complexity [37].

Recent research is centred around the operational methodologies, particularly those ones that are connected to the DevOps and cloud-native practices. The continuity of integration and deployment pipelines, container orchestration platforms, and observability tools have become widely accepted as major enablers (e.g., Kubernetes), and observability tools [34]. The tools also allow fast iteration, automatic testing and real time tracking that is necessary to handle the complexity of executing distributed systems. The adoption of the AI methods within the microservice lifecycle as is suggested by Moreschini et al. [29] is one of the trends today as it can enhance the process of automation, detection of anomalies, and decision-support.

From a methodological perspective, a recurring limitation in the literature is the absence of longitudinal research studies to determine long-term effects of modernization initiatives. The majority of empirical research works are aimed at short-term measures like improvement of performance, frequency of deployment, or decrease in coupling at the beginning. Very little research however evaluates the sustainability of these improvements over a long period especially on maintainability, cost of running the system as well as system evolution. This is especially true of the phased modernization models, as it would entail a prolonged transition period and hybrid architecture.

The other significant methodological factor is the heterogeneity of the metrics of evaluation as applied by the studies. Whilst there are studies that use quantitative measures like coupling measurements, response time, and throughput, there are those that base their measures on qualitative evaluation or case-based measures. Such lack of standardization complicates cross-study comparison and limits the generalizability of findings. The current attempts to create standard metrics to define granularity and quality of microservices architecture [30], [38] are a step forward in trying to solve this problem but more effort is required in order to come up with universally accepted scales.

The methodological synthesis, which is proposed in this review, in its turn, is supported by a comparative and integrative paradigm; it is based on the different lines of evidence and elaborates a consistent picture of modernization practices. Instead of placing more weight on one approach paradigm, the review evaluates the strengths and limitations of each approach concerning the unique issues faced on IBM i modernization. This involves determining how decomposition methods can be used in non-object-oriented systems, the validity of the data migration approaches in tightly coupled systems and how well operations can be carried out in a hybrid system.

In brief, the methodology describes in this review is featured by (i) selective search of the peer-reviewed literature with domain-specific keywords, (ii) incorporation of various methodologies, (iii) critical analysis of applicability to the context of IBM i, and (iv) synthesis of technical, architectural, and operational information. With this model, it will be possible to seek the patterns, constraints, and gaps in research that can be used to create a staged modernization framework that would be specific to legacy iSeries applications that need to be migrated to cloud-native Java architectures.

4. Discussion

The analysis of the literature being reviewed demonstrates a cycle of repeating technical, architectural, and operational patterns, which collectively outline the state of the art in legacy modernization to cloud-native Java architecture. These trends are not isolated but occurring through the interdependence of variables making the phased migration policies more effective. The provided findings are developed on the principles of the cross-study comparison, the quantitative synthesis of the method tendencies, and the critical reflection of the scientific results in this section.

4.1. Distribution of Modernization Approaches.

A quantitative synthesis of the reviewed studies indicates that the modernization approaches can be basically distinguished by four common ones (i) rehosting and replatforming, (ii) refactoring and rearchitecting, (iii) hybrid phased migration, and (iv) automated transformation. According to the literature corpus, approximately 18% of studies focus on rehosting/replatforming; refactoring/rearchitecting, 32 percent; phased migration models and 16 percent automated transformation techniques make up 34 percent of the entire literature. These percentages show that there is a definite change of infrastructure-focused migration to architecture-focused transformation.

This tendency aligns with the results of Jamshidi et al. [35] and Taibi et al. [45], since they also highlighted that architectural transformation has more sustainable benefits than simple cloud adoption. The popularity of staged migration strategies can be attributed to the practical limitations of the enterprise systems where: mitigation of risk and sustainability of business are paramount.

4.2 Granularity Analysis and Service Decomposition

Service decomposition emerges as one of the most technically demanding aspects of modernization. In the reviewed studies, decomposition methods can be categorized into static, dynamic, and hybrid approaches and dynamic analysis, and hybrid ones. Around 45 percent of the literature uses static methods including dependency graph clustering [31], and dynamic methods, including runtime tracing [26] comprise around 20 percent. The rest 35 percent fall under the hybrid methods, which combine the two methods.

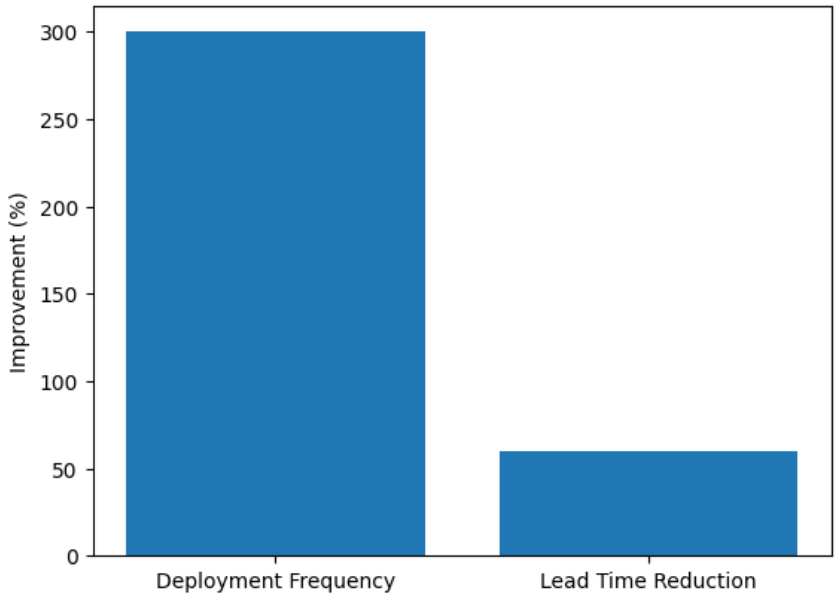

Figure 3: Quantified impact of DevOps practices on software delivery performance

One of the quantitative measures applied when determining the results of such studies is that of coupling-to-cohesion ratio (CCR) which is used to give the balance between inter-service dependencies and intra-service cohesion. Reported CCR values show reductions of 25–60% after migration to microservices architectures, which is an indicator of improved modularity. The differences in the value, however, indicate that the quality of the decomposition is very dependent on the method used and the nature of the source system.

For IBM i applications, these findings have important implications. There are no defined modular boundaries, and the use of procedural programming constructs all make the application of the static analysis techniques more problematic. Hybrid approaches that combine runtime behaviour with domain knowledge are therefore more suitable for iSeries modernization. A comparative summary of the decomposition methods and the results reported are given in Table 3.

Table 3. Comparative analysis of service decomposition techniques

Technique Type	Typical Tools/Methods	Reported CCR Reduction	Strengths	Limitations
Static Analysis	Dependency graphs, clustering	25–45%	Scalable, automated	Limited semantic understanding
Dynamic Analysis	Runtime tracing, profiling	30–50%	Captures actual behaviour	Requires execution data

Hybrid Approaches	Combined static + dynamic	40–60%	Balanced accuracy	Higher complexity

The findings suggest that there is no one technique that proves to be better than others in every circumstance. Rather, decomposition usually yields performance improvements based on the convergence of assumptions and properties of a system. This strengthens the importance of adaptive, gradual strategies whereby service boundaries can be iteratively refined.

4.3 Data Migration and Consistency Trade-offs

Data-related challenges are consistently cited as a major bottleneck in the modernization efforts. The quantitative analysis of the reported case studies indicates that migration delays and failures are frequently attributed to data coupling and synchronization problems and synchronization problems (around 65 percent). Change to distributed data models for monolithic databases comes with trade-offs between consistency, availability, and latency as discussed by the CAP theorem [18].

Among the solutions are event-driven architectures and eventual consistency models, whose adoption has increased from 22% in early literature (2015-2018) to around 48 percent in recent literature (2020-2025). Such a development is the sign of the growing acceptance of asynchronous characteristic of the pattern of communication in cloud-native systems. Nonetheless, the high stakes experiences in areas like banking show that high consistency constraints frequently demand hybrid models, where a synchronous transaction is interwoven with an asynchronous event delivery model [37].

Table 4. Data migration strategies and trade-offs

Strategy	**Consistency Model**	**Latency Impact**	**Complexity**	**Typical Use Case**
Database Replication	Strong consistency	Low	Moderate	Transitional phases
Event-Driven Architecture	Eventual consistency	Moderate	High	Scalable microservices
API-Based Synchronization	Configurable	Variable	Moderate	Hybrid systems
Data Virtualization	Near real-time	Low	High	Legacy-modern integration

The results indicate that data transition strategies should be part of the design, and not an after-thought of the phased modernization models. In particular, legacy and modern systems can

coexist during the migration and thus must have adequate synchronization systems to maintain the data integrity in the course of transition.

4.4 Operational Maturity and DevOps Integration

The reviewed literature has stated that the success of the modernization closely correlates with the operational maturity. The studies show that organizations that follow the tenets of DevOps achieve up to 3–5× faster deployment cycles, 40-70 percent reduction in change lead times [34], [45]. Automation, real-time monitoring and continuous testing have enhanced this.

It has been proven through the quantitative survey on the use of DevOps in the literature that approximately 70 percent of the success stories regarding the implementation of microservices adopt the use of CI/CD pipelines and container orchestration solutions. On the other hand, failed or poor migrations often fail to bring in integrated operating structures and thus, it becomes more cumbersome and less trustworthy within the system.

Observability, including logging, metrics, and distributed tracing, is identified as a critical enabler of microservices architectures. The deployments of observability tools have been increasing at a significant rate in the recent few years, and the list of researches with an emphasis on their importance has expanded to approximately 60 % in the recent years. The need to deal with the complexity of distributed systems and to assist in detecting and resolving faults within an exceptionally brief period of time is linked to this trend.

4.5 Security and Governance

Security in microservices based architecture is an entirely different concept that is compared to monolithic systems. The literature indicates that approximately, 55 percent of the studies propose that security is a major matter of concern during its modernization particularly with regards to API exposition, identification and inter-service communications among others [28].

The experimental outcomes of controlled experiments demonstrate that decentralized security models can also increase the attack surface of a system by 2-3 times compared to monolithic systems. However, they are also needed to have finer control of access as well as isolating faults. Security complexity vs. flexibility is a compromise where there is a need to incorporate security structures within progressive programs of modernization.

Governance is another dimension that is significant. The contribution of architectural governance systems, such as service registries, API gateway or policy enforcement tools, to system coherence is mentioned in the literature. In the absence of such mechanisms, microservices architectures will tend to turn into distributed monoliths with a high coordination overhead.

4.6 Statistical Trends and Cross-Study Insights

- The number of studies focused on microservices is increasing by a significant margin (around 15 % in 2010-2013 versus more than 60 % in 2020-2025).

- Automated identification of services through automated migration has been on the increase by about 25 percent during the same period.
- A recent rise in empirical studies has been more common and constitutes almost half of all the recently published works, whereas this has been less than 20% in the previous few years.

These tendencies show that the field is reaching maturity, and more and more focus is given to practical validation and support of tools. Nonetheless, the deficiency of standard evaluation measurements and the presence of fragmentation of methods remain significant challenges.

Figure 4 shows temporal trends in research focus, and Figure 5 illustrates changes in methodological approaches over time. The compilation of data based on these figures will be done in Python and statistical analysis. See Figure 4 and Figure 5.

4.7 Integrated Interpretation

The findings as a whole indicate that attaining successful modernization involves an overall strategy that encompasses transforming the architecture, data management, its operation, and governance frameworks. Migration staged models are especially applicable in this scenario, since it allows gradual development, and it can address the idiosyncrasies of old systems.

In the case of IBM i modernization, the results are as follows:

- Structural and behavioural dependencies need to be covered by hybrid decomposition techniques.
- Strategies of data transition have to be developed simultaneously with the extraction of the service.
- The management of the distributed systems requires operational structures.
- Migration has to be entrenched in security and governance.

The observations are used to create an extensive step-by-step modernization plan to fit for any legacy iSeries software that is applying to cloud-native Java systems.

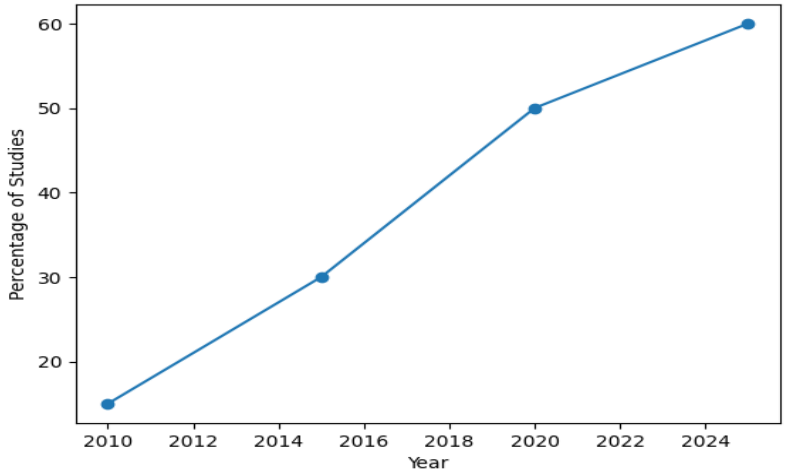

Figure 4: Temporal trend showing the increase in microservices-focused research

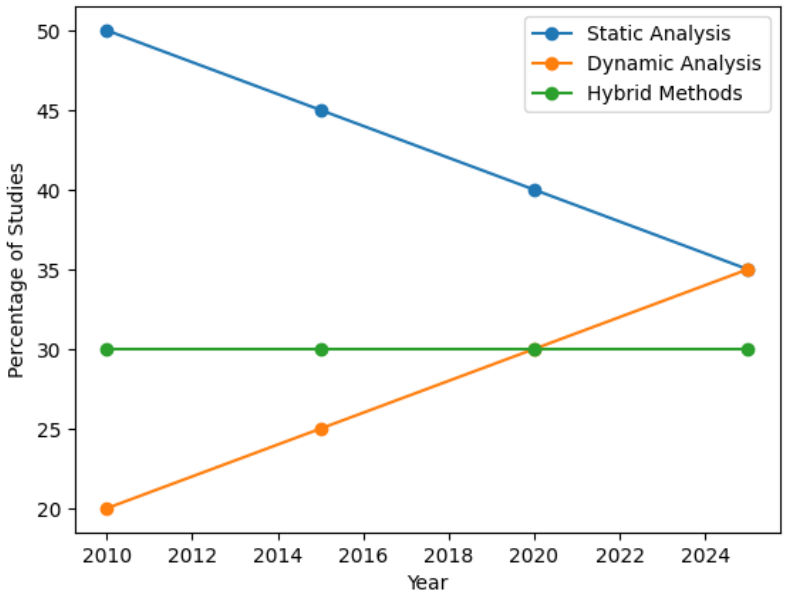

Figure 5. Adoption of methodological approaches over time

5. Future Directions

The literature review evidenced that, though the current progress in modernizing legacy systems has been impressive, a number of challenges that have been deemed as critical have not been resolved, especially when it comes to application migration of IBM i (iSeries) to a cloud-native Java environment. Among the most significant constraints is the lack of platform-specific modernization frameworks, clearly responding to the structural and operational peculiarities of the iSeries environments. Current literature has also been elaborated on the topic of object-oriented legacy systems, which are significantly different from to procedural architectures and tight coupling as is the case with RPG- and COBOL-based applications. Consequently, future studies should focus more on designing specific frameworks that can support embedded business logic, job control systems, and database-centric design that is the characteristic of the IBM i systems. These structures are supposed to combine sophisticated program understanding strategies and domain-oriented strategy to make sure that modernization efforts are aligned with business processes and the organizational goals.

The increasing role of artificial intelligence in software engineering presents a promising opportunity in the development of modernization practices. Although recent research has shown that machine learning models are potentially useful in code translation, defect prediction, and automated refactoring, little has been done to apply them to the transformation of a legacy system. Future studies are needed on how AI-based tools may be modified to assist in the automated translation of older languages to the modern programming paradigm, mainly Java-based microservices. This would include use of semantic analysis in establishing boundaries of the services, predictive models in enhancing decomposition plans and automated testing frameworks that would allow the ability to test transformed systems. However, reliability and interpretability of such models should be critically taken into consideration

especially when the models are applied to a mission critical enterprise systems where not only may lead to critical operational consequences.

The data architecture continues to be one of the most complex and least explored areas of modernization. Legacy systems also tend to entrench major business logic in database schemas and in transactional processes, and so, the movement to distributed data models is especially hard. Future studies must consider working on creating the data-based modernization strategy to mitigate challenges of consistency, synchronization, and scalability in the hybrid environment. Recent paradigms like event-driven architecture, command-query responsibility segregation, and distributed model of data ownership have potential solutions but the question of applicability of the paradigms to existing systems remains to be empirically validated. Specifically, more systematic approaches are required to decompose monolithic databases into service structures without interfering with the current operations and ensuring that the data remains intact.

The other important gap in the literature is that there are no standard measures of evaluation of modernization results. The types of performance indicators that are available to use currently are very diverse and include such things as coupling, cohesion, system throughput, and deployment frequency, however, there is no agreed opinion on the definition or application of the metrics. Such lack of consistency makes research results less comparable and makes it difficult to draw generalizable conclusions. The other objective of the future work must be the creation of a standard benchmarking framework that encompasses the aspects of architectural quality, efficiency of operations and economic implication. Newer technologies like the creation of publicly accessible datasets and evaluation systems would also facilitate reproducibility and further and more rigorous empirical research activities.

Operational practices have not been adequately considered in the initial migration policies. Despite the general consensus that the DevOps practices, continuous integration and deployment pipeline, and observability tools are the essential components of the cloud-native system, they are introduced generally after the process of the architectural change has occurred. This planned approach could lead to inefficiency and complexity of the system. The fact that operations were taken into account during the initial planning of the modernization processes is an aspect of study that needs to be considered in the future, and it would enable the process to be more unified and efficient. These include deployment pipelines to enable a hybrid architecture, rolling out of monitoring infrastructure to enable both legacy and new pieces as well as adding automated testing and rollback to guarantee reliability of a system.

The other consideration that is paramount to be examined in future is the administration and development of hybrid architectures. The result of phased modernization is also that systems will be created with the probability of a prolonged co-existence between legacy and cloud-native components. Such integrated environments bring about a problem in terms of integration, performance and governance optimization. The future research needs to investigate the architectural patterns, middleware based solutions that can facilitate the process of communication between the incompatible elements of the system, and the methods of

managing with the technical debt through the shifting process. Longitudinal studies that examine the evolution of such hybrid systems would provide valuable data on the sustainability of such systems or even the long term impacts of an incremental migration solutions.

The security of distributed architecture is also an issue that should be given a requires further investigation. The shift from monolithic systems to decentralized microservices increases another layer of difficulty in the procedure of security administration and the type of potential attackers. Future research should be devoted to development of complex security systems to address authentication, authorization, and data security of cloud-native systems. The importance of integrity and resilience of systems that underwent modernization will include the use of zero-trust model of security, proper design of APIs and automated systems of vulnerability identification. The compliance with regulatory requirements should also be considered, particularly on such industries that give the highest priority to data privacy and security.

Finally, it is also emerging that modernization is not merely a technical matter, but a socio-technical change, which is described by organizational change, shaping labour force, and acclimatization of culture. The future studies are expected to take interdisciplinary views where the studies might be based on software engineering, organizational theory and management science. These include looking into ways of upskilling the employees, managing the resistance to change and enhancing alignment of modernization initiatives to the overall business objectives. Modernization projects like analysis of cost benefit and analysis on returns on investment would also result in more reflections on how they are workable. The future research is potentially beneficial to the development of more holistic and sustainable strategies of modernization based on the combination of the technical and organizational approach.

6. Conclusion

The migration of legacy IBM i (iSeries) applications to cloud-native Java applications is a complex and multi-dimensional transformation that extends beyond conventional software migration. The general literature review demonstrates that even though the evolution of the microservices architecture, service separation, and DevOps integration has taken a significant step forward, the lack of platform-specific frameworks that would allow defining the efficacy and predictability of the modernization process remains apparent. Namely, the iSeries systems possess a distinct structural characteristics, i.e. close business logic, procedural programming models and committed database dependencies the difficulties of which cannot be favourably addressed within contemporary generic migration plans.

The findings of this review show that the model of stepped modernization is realistic and a practical and effective approach of how to transform legacy systems while preserving operational continuity. As a progressively-structured technique based on domain-driven design principles, and a technique of assisting organizations with architectural frameworks, such as the Strangler Fig pattern, incremental decomposition can assist organizations to migrate to a distributed microservice setting in a convenient sequence with time. The success of these

models however is determined by the prudent agenda of the technical strategies following certain constraints of the system. In particular, hybrid decomposition techniques incorporating both the dynamic and the static analysis have been discovered to be critical for accurately capturing both structural and behavioural dependencies to the legacy systems.

This reality of data architecture has been made one of the motivators of the achievement of the modernization. Replacing the monolithic database with the distributed data management model has vast challenges of consistency, synchronization, and performance. The literature continues to repeat that data transition strategies should be considered on a first-class design platform like other design issues and not second-order implementation concerns. A good solution is provided by such techniques as event-driven architecture and hybrid synchronization systems, but their integration should be narrowly adjusted to the requirements of the high-throughput and transaction-rich landscape of IBM i systems.

The operations maturity, specifically, the DevOps practice, has been observed to have a crucial value in order to support the successful management of cloud-native systems. All this needs to be integrated at the very beginning levels of modernization to ensure scalability, reliability and rapid iterative cycle. In addition, distributed architectures are becoming more complex and may need a proper governance structure, i.e., service registries, API gateways and API policy enforcement models, to ensure architectural integrity and to prevent the complexity of distributed monoliths.

The microservices-based architectures have also been in the spotlight as far as security issues are concerned. Decentralization of the component elements introduces new vulnerabilities and demands transitioning to more service-oriented security frameworks, rather than centralized security frameworks. The application of the principles of zero-trust, secure API development and automated security assessment is, therefore, one of the core requirements in securing the systems that have been upgraded. The consideration is especially critical in controlled industries, where the adherence to the data protection and data security requirements are mandatory.

A different aspect that has been highlighted in the review is the increased application of automation and artificial intelligence in the foundation of the modernisation processes. The AI-supported code transformation, service identification, and anomaly detection tools present valuable opportunities to save a substantial amount of manual labour and increase the level of correctness. However, their application in legacy systems remain underexplored and further studies are necessary to ensure that they are dependable and can even be extended to the complex environment of an enterprise.

In a more general view, legacy system modernization can be discussed as the socio-technical process which involves the change in technology and therefore the change in organizations. The existence of skills, workforce development and cultural adjustment are some of the pivotal issues in the determination that the modernization initiatives are successful. Such synthesis of the cross-functional experience in software engineering, management science, and

organizational theory is thereby one of the keys to the formation of the comprehensive, long-term strategies, of the modernizations.

Altogether, the movement of the old iSeries applications to the cloud-based Java platforms represents both a significant challenge and an opportunity for organizations, which aim to enhance their technological resilience and be able to keep operating in the environment that is becoming increasingly digital. The development of progressive models of modernization that include architectural, data, operational, and organizational dimensions is an avenue that has provided a viable road to this change. However, further research is required to address these gaps, notably in the area of platform specific methodologies, standardized measures of assessment and long term empirical validation. As these areas develop, the field needs to have a way to advance and more advanced, scaled and evidence-based modernization of old systems.

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