2025 MACH Alliance Global Annual Research

Annual Survey of Global IT Decision Makers

Quick Guide

MACH
A L L I A N C E

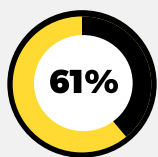Developed in January 2025, prepared in November 2024,
commissioned by the MACH Alliance

MACH ADOPTION

MACH is Everywhere: The Emerging Standard in Technology

Technologies enabling a composable strategy have reached a tipping point, becoming the go-to architecture for forward-thinking enterprises. With **91% of organizations** increasing their MACH infrastructure in the past year, this momentum reflects a major shift in how businesses approach agility and innovation. By 2026, organizations anticipate that **61% of their technology** stack will be MACH, further solidifying this trend.
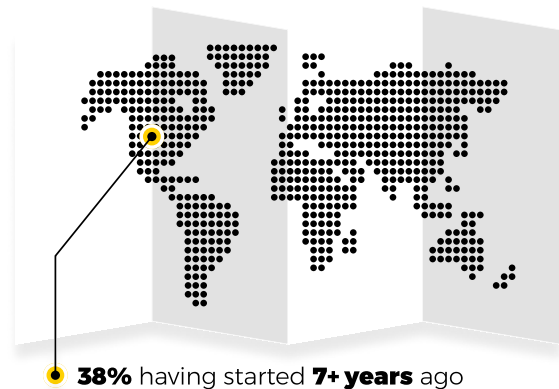
Newer organizations are leading the charge, leveraging MACH to leapfrog legacy systems. Their agility allows them to implement MACH faster, while older companies face greater challenges in transitioning from existing infrastructure. **North America** now leads in MACH adoption, with 38% of organizations starting their MACH journey over seven years ago, signaling the region's growing dominance in this space.

61% average percentage of **tech setup** expected to be **MACH** or **composable** by start of **2026**

38% having started **7+ years** ago

Key Drivers of MACH Adoption

Organizations are turning to MACH for its flexibility, scalability, and ability to respond to rapidly evolving business needs. In sectors like **retail**, where 38% of companies began their MACH journey over **seven years ago**, MACH adoption has become foundational for success. Other industries, such as professional services and technology, are quickly catching up, driven by competitive pressures and the demand for enhanced customer experiences.

The Benefits Are Clear

Early adopters of MACH are seeing tangible benefits, from improved **customer experience** to increased **operational efficiency**. The flexibility of MACH makes it the **ideal choice for businesses seeking to innovate while keeping pace with evolving market** demands. The data underscores a universal truth: organizations that embrace MACH early are poised to gain a significant competitive edge.

By adopting MACH, businesses aren't just upgrading technology—they're future-proofing their operations, ensuring adaptability, and setting the stage for sustained growth.

MACH
ALLIANCE

chapter 2

MACH READINESS & MINDSET
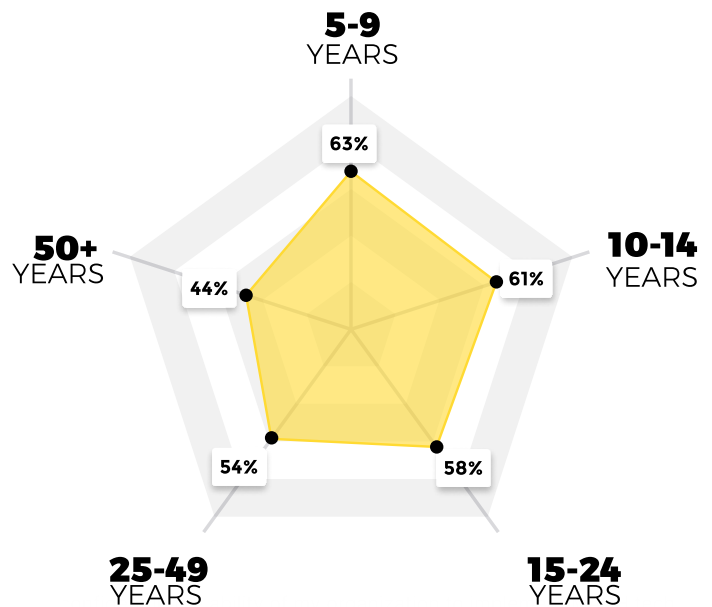
Leadership Drives MACH Momentum

The role of senior leadership is crucial in fostering readiness. 86% of respondents agree that leadership prioritizes MACH investment, ensuring the alignment of strategy and resources. This top-down support is essential for driving the cultural and operational shifts required for successful MACH implementation.

Confidence in MACH Readiness Is High

Across industries, readiness to adopt MACH technologies is on the rise. A **remarkable 87%** of respondents express **confidence in their organization's ability to implement MACH**, signaling a positive mindset shift. Newer organizations are particularly confident, with 63% of those operating under 15 years showing strong assurance in their readiness. In contrast, older companies face more hurdles, but 44% of organizations over 50 years old still strongly agree they have the right mindset and drive to embrace MACH.

9 in 10 agree that **MACH mindset exists** in their organization

Innovation Mindset Fuels MACH Success

MACH adoption thrives in organizations that are open to experimentation. **88% of respondents agree their organizations embrace innovation**, but this openness varies by MACH maturity. For companies already deep into their MACH journey, **63% strongly agree that their culture fosters innovation**, compared to only **36% of those just beginning**. This highlights the reinforcing loop between MACH adoption and advancing organizational transformation.

Takeaway

Organizations that foster a MACH-ready culture—backed by leadership support and a willingness to innovate—are well-positioned to accelerate adoption. By embracing MACH as the foundation for their composable strategy, businesses can gain the agility and resilience needed to remain competitive in a fast-changing environment.
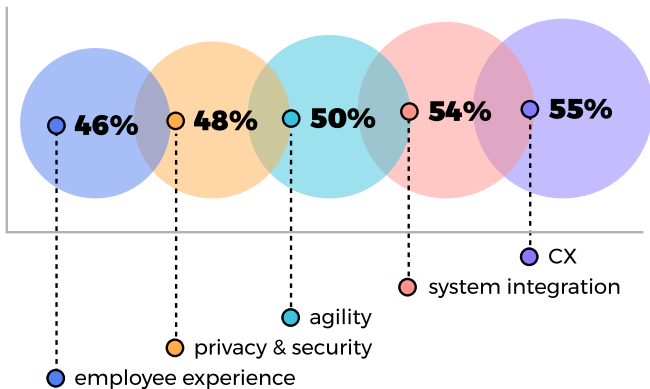
5-9 YEARS — 63%
10-14 YEARS — 61%
15-24 YEARS — 58%
25-49 YEARS — 54%
50+ YEARS — 44%

chapter 3

MACH BENEFITS & ROI

Competitive Edge Through MACH

MACH adopters report significant competitive advantages, with **79% agreeing their organization is ahead of competitors**, and this figure rises to **91% for deeply MACH-mature organizations**. MACH's flexibility to scale, pivot, and innovate ensures businesses stay ahead in dynamic markets.

MACH Delivers on Its Promises

Organizations adopting MACH are reaping the rewards. A **striking 93% of respondents** report that the ROI from MACH has met or exceeded expectations, dispelling concerns about the upfront investment. The modular and agile nature of MACH has become a game-changer, enabling organizations to unlock significant operational, financial, and competitive advantages.
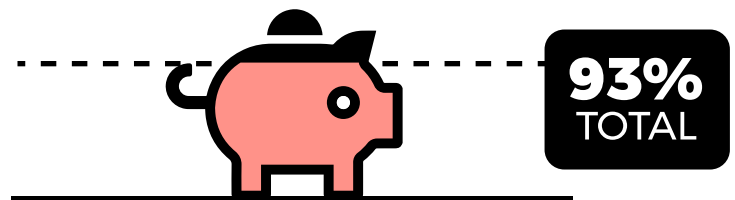

93% TOTAL

46% **48%** **50%** **54%** **55%**

CX

system integration

agility

privacy & security

employee experience

Long-Term Gains

MACH adoption helps organizations escape the costly cycle of legacy system upgrades. Companies with extensive MACH implementation report lower operational costs and greater efficiency. Conversely, businesses with **two-thirds or more of their infrastructure still tied to legacy** spend nearly **60%** of their **IT time and budget on upgrades**, reducing resources for innovation.

Top Benefits Driving MACH Success

Key advantages reported by respondents include:

- *Improved Customer Experience:* The top benefit, cited by **55% of organizations.** MACH empowers businesses to meet customer demands through agility and personalization.
- *Enhanced Process Integration:* **54% of organizations** benefit from MACH's ability to integrate systems more effectively, streamlining operations, and improving efficiency.
- *Increased Agility:* **50% of respondents** highlight MACH's capacity to respond rapidly to market opportunities and challenges.

Takeaway

MACH technologies are not merely a technical upgrade; they represent a strategic investment delivering consistent, measurable benefits. From enhanced customer experiences, to increased operational agility, MACH enables organizations to thrive in today's competitive and fast-changing business environment.
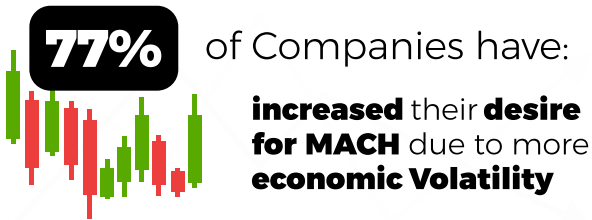
GLOBAL MEGATRENDS & MACH

MACH Adapts to a Changing World

In a volatile global economy, MACH is proving its value as a resilient and adaptive technology strategy. **77% of organizations** report that economic uncertainty has increased their desire to adopt MACH, with **35% saying this desire has grown significantly in the past year**. The flexibility and modularity of MACH make it a critical tool for navigating unpredictable market conditions.

77% of Companies have:

increased their **desire for MACH** due to more **economic Volatility**

MACH and the AI Advantage

MACH maturity strongly correlates with advancements in AI. Among organizations well along in their MACH journey, **77% report using AI**, compared to only **36% of those new to MACH**. This reflects a shared mindset and infrastructure that prioritizes modernization and agility, enabling greater progress with AI technologies. Companies more MACH-mature are also more likely to embrace a progressive strategy, which supports both composable architecture and advanced AI integration.

The data suggests that the same forward-thinking approach to modernization facilitates success across both domains.
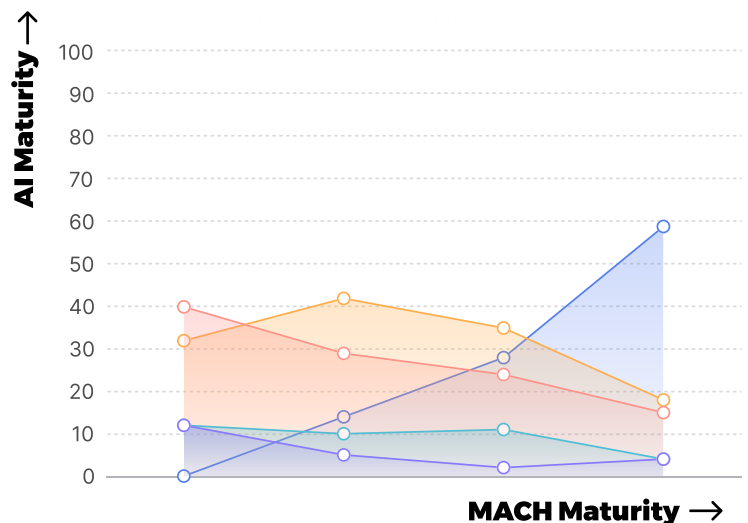
Regional and Industry Insights

North America now leads the way in MACH adoption, with companies benefiting from its ability to adapt to global economic challenges. Retail, a traditionally fast-paced sector, has been an early leader, leveraging

MACH's agility to meet omnichannel customer demands. Other industries, like professional services, are catching up as they recognize MACH's potential to drive growth and resilience.

A Strategic Response to Economic Volatility

Organizations further along in their MACH journey have been better equipped to navigate uncertainty. MACH's modular nature allows businesses to scale up or pivot without the heavy costs and constraints of monolithic legacy systems, making it a vital tool in today's unpredictable landscape.

AI Maturity → (y-axis: 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100)

MACH Maturity →

- Our organization does not use AI at all
- We only use AI in basic applications
- AI is used within technology stack because our vendor is using it
- Use AI in-house within our technology stack
- AI in our technology stack ahead of competitors

Takeaway

The intersection of global megatrends, like AI and economic volatility, highlights MACH's transformative potential. By fostering a modernization-focused mindset, MACH allows organizations to embrace the flexibility, scalability, and innovation needed to thrive in the modern era.
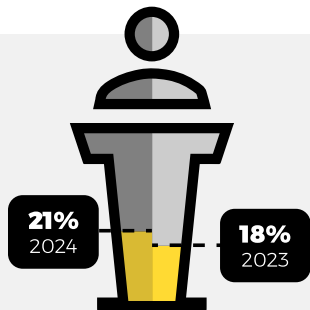
CHALLENGES

Skills and Expertise

MACH requires specific expertise, and 23% of organizations see internal skills gaps as an area to address. Awareness of this helps organizations plan for training and support to make the most of their MACH investments.

For organizations to succeed with MACH, it's important to consider the following areas for a smooth and effective transition. Being aware of these challenges can help ensure progress stays on track.

Leadership Alignment

Leadership plays a vital role in MACH success. While 86% of leaders prioritize MACH investments, 29% of organizations also report lack of leadership buy-in as a challenge. Awareness of this potential gap is key to ensuring MACH adoption has the necessary support from the top.

0 5 10 15 20 25 30 35 40

Investment vs **Benefits** Unclear — 31%

IT Team Resistant to Change — 29%

Customers Resistant to Change — 29%

Lack of Systems to manage **Composable Systems** — 28%

Current Vendor Dependency — 26%

Board / Leadership support is **one** of the **key barriers** to MACH implementation

21% 2024

18% 2023

Choosing Solutions

With MACH's composable nature, assembling the right tools can be a consideration. 26% of respondents note the desire for more ready-made solutions, highlighting the importance of carefully navigating vendor options to find the best fit.
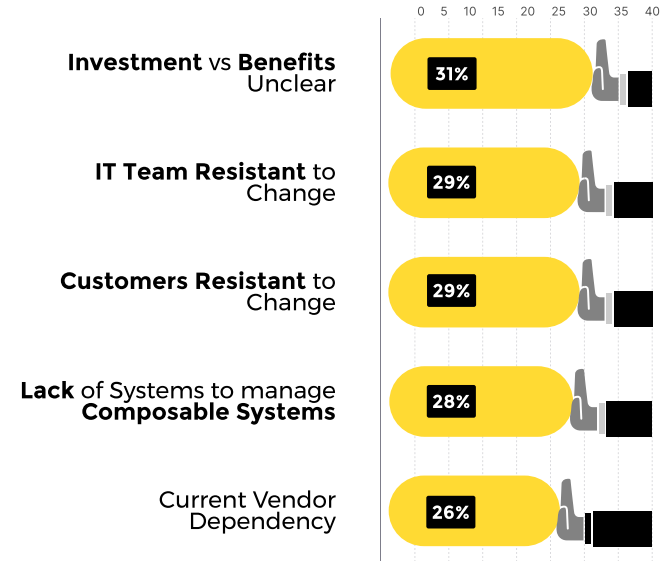
Clarity Around ROI

For some, demonstrating ROI early in the process can be hard. This is important to note, especially since 93% of organizations report MACH meets or exceeds ROI expectations. Knowing the potential for long-term gains can help stakeholders appreciate MACH's value.

Takeaway

Understanding these areas helps organizations confidently move forward on their MACH journey. By staying aware of these dynamics, businesses can set the stage for agility, innovation, and long-term success.

Engaging Teams

Team-level resistance is another area to watch, with 29% identifying it as a challenge during MACH implementation. Understanding this dynamic can help organizations anticipate and navigate adjustments as teams move from legacy systems to MACH.