Admissions Playbook

Version 2.0 Published Jan 25

192.2



MACH Alliance Playbook: Foreword

We're excited to have you on this journey of redefining the future of technology. As you delve into our playbook, you'll discover the intricate details of our admission process. This process isn't just a set of steps; it's a carefully crafted roadmap that embodies our commitment to excellence and transparency.

At the heart of this process lies our shared vision for the MACH approach — Microservices, API-first, Cloud-native multi-tenancy SaaS, Headless.* These principles are more than just buzzwords; they're the foundation upon which we're building the next generation of digital solutions.

Our admission criteria serve as a compass guiding us through the vast landscape of applicants. We measure and score each application, not just to assess compatibility, but to foster a community that's dedicated to innovation, collaboration, and progress.

Transparency is a cornerstone of our approach. We believe in providing insights into our selection process so that you understand why each step matters. By demystifying our criteria and measurements, we're striving to create an environment where trust and understanding flourish.

We're well aware of the effort it takes to complete our application process, and we sincerely appreciate your commitment. Your dedication reflects your enthusiasm to contribute to a future where technology is agile, adaptable, and aligned with the needs of modern businesses.

So, let's embark on this journey together. Dive into our playbook, absorb the nuances of our admission process, and gain a deeper understanding of our shared mission.



*See p46 for links to detailed definitions

Table of Contents

- → Introduction & Structure
- → <u>Member Categories</u>
- → Admission Process

1st Evaluation - Application Form2nd Evaluation - Technical AssessmentFinal Review - Executive Board Approval

→ Special Cases

Company Acquisitions/Mergers Applications from legacy vendors



1 - Introduction & Structure

Admissions Panel

The Admissions Panel is responsible for actions connected to prospective members of the MACH Alliance. The group is responsible for:

- \rightarrow Conducting initial reviews against criteria for applications
- → Completing Tech Checks rigorous examinations of technologies for new applications

The Admissions Panel is a diverse group of expert volunteers from our Independent Software Vendor (ISV), Systems Integrator (SI) and Enabler members of the Alliance. Diversity is needed in regard to:

- \rightarrow Region
- \rightarrow ISV, Enabler and SI
- \rightarrow For ISVs: domains such as commerce, experience, search, content, personalization etc.

We ensure at least 10 panel members for each assessment. Members are expected to participate in at least 2 evaluation sessions per month on average.

All panel members have signed a dedicated non-disclosure agreement (NDA) with the Alliance before taking part in any of the admission process. Upon assigning evaluators, any potential conflict of interest is also considered to prevent competitors assessing competitors.

The Admissions Panel is supported by a full-time member of staff, the Councils & Admissions Lead and the MACH Alliance Technical Analyst.



Admissions Panel Code of Conduct

- 1. **Impartiality**: Panel members must maintain complete impartiality. Decisions should be made without prejudice, bias, or favoritism, treating all applicants equally based on the given criteria. Negative or positive feedback should not be shared with applicants at any time by panel members.
- 2. **Confidentiality**: The privacy of applicants should be respected at all times. Application data should not be disclosed outside of the panel unless required by law. An NDA will be signed by both parties involved in the evaluation process.
- 3. **Conflict of Interest**: Any potential conflict of interest must be declared. Panel members must not assess, or be involved in any applications that are deemed a conflict of interest.
- 4. **Communication:** There are to be no independent discussions around member applications or Alliance members outside of the official admissions panel channels of communication. All communications from the Alliance to the member applicant must come directly from the admissions lead.
- 5. **Transparency & Accountability**: The panel should be open and accountable in its decisions. Feedback should be given, where appropriate, to help applicants understand the decision-making process.
- 6. **Demonstrate respect & collaboration**: All panel members are encouraged to hold a high level of respect and embrace collaboration for both their fellow panel members and applicants. This includes actively listening, considering their ideas, and providing insightful feedback in a civilized manner.

By adhering to this code of conduct, we strive to maintain a fair, respectful, and ethical admissions process.



2 - Member Categories

1000-

ETT REPART

-

11 47

Categories | System Integrators

Boutique SI

- → > 25 headcount
- → 3 clients doing > \$500M revenue on MACH/composable work
- → 1 Cloud provider partnership
- → 3 MACH vendor partnerships
- → 1 piece of MACH marketing content
- → 90%+ MACH focused business
- → 2 examples of supporting the movement
- → Uniqueness in the category
- → Recommended by 2 MACH vendors
- → 3 MACH case studies

SI

- → > 250 headcount
- → 5 clients doing > \$800M revenue on MACH/composable work
- → 2 Cloud provider partnerships
- → 4 MACH vendor partnerships
- → 3 pieces of MACH marketing content
- Dedicated MACH, Composable or equivalent Centre of Excellence (CoE)
- → Centralized mgmt org for the above
- → Recommended by 3 MACH vendors
- → 5 MACH case studies

Global Sl

- → > 5000 headcount
- → 5 clients doing > \$1B revenue on MACH/composable work
- → 3 Cloud provider partnerships
- → 5 MACH vendor partnerships
- → 5 pieces of MACH marketing content
- → Dedicated MACH, Composable or equivalent CoE
- → Centralized mgmt org for the above
- → Recommended by 5 MACH vendors
- → 10 MACH case studies



Categories | Independent Software Vendors

Start-up ISV*

- → > 30 headcount
- → and/or \$2M to \$10M annual revenue from product licenses
- Your entire company product(s) offering/portfolio must be MACH compliant
- Application sponsorship from a MACH Alliance Executive Board member
- → Live projects with at least 2 other MACH Alliance member companies

*Additional terms apply for independent brands or legacy software, outlined in the Special Cases section at the end of this document

ISV*

- → > 50 headcount
- → and/or \$10M+ annual revenue from product licenses
- → Your entire company product(s) offering/portfolio must be MACH compliant
- \rightarrow 15 or more customers, each > \$100M in annual revenue
- → Live projects with at least 3 other MACH Alliance member companies

*Additional terms apply for independent brands or legacy software, outlined in the Special Cases section at the end of this document



Categories | Enablers

Enabler

- → Clearly explain how your offering(s) enables MACH architecture
- → Should enable at least 3 enterprise-grade solutions or clients using MACH technology
- → A minimum of 5 ISV partners with at least \$100M in Annual Recurring Revenue (ARR)

An Enabler is a product(s) that when implemented delivers a technical capability that the business can consume.

At the moment we have identified 3 Enabler categories; however, an Enabler can be in more than one category.

- → Cloud Computing: Provides computing capabilities that are cloud-native or iPaaS solutions. The aggregation of services, deployment, and hosting should be considering cloud computing.
- → Cloud Services: Provides services that are delivered on a cloud environment, like Content Delivery Network (CDN), and repositories.
- \rightarrow Cloud DevOps & Hosting: Provides an opinionated DevOps approach for applications to be hosted on the cloud.
- → Tooling and supporting software: Including no-code / low-code software, Integrated Development Environments (IDEs), scripting and provisioning frameworks.





The high level process:

- Application form on the Alliance website submitted \rightarrow
- 1st evaluation of applicants based on their response to the \rightarrow application form and scoring against criteria
- 2nd evaluation based on tech assessment session(s), \rightarrow followed by scoring against technical criteria
- Final review and approval by MACH Alliance Executive \rightarrow Board
- MACH Certification once applicant has satisfied all criteria \rightarrow

Should their expertise be required, additional evaluations can be carried out by the Growth or Tech Council. If at any step the evaluation is unsuccessful, the rejection, including an explanation, will be provided according to the rejection process outlined.

Typically the admissions process takes 6 to 12 weeks.



Rejection Process

To ensure that all applications are dealt with in a transparent, consistent, and informed manner, we have mapped out the following process:

- 1. After a thorough review by our panel of experts, if the application fails to meet our requirements at any stage of the evaluation, an email is sent to the applicant outlining the reason(s) for rejection and the related criteria points.
- 2. A 45-minute call will be offered between the panel and the applicant team, sharing further rationale for the rejection and offering the applicant team the opportunity to provide any clarification they deem necessary.
- 3. If the reviewed result is not a positive recommendation, the application is marked as denied. Any further concerns can be raised via the appeal process.
- 4. If the reviewed result is a positive recommendation, the application will be passed to the Executive Board for the final stage of review.
- 5. If the assessment team is at an impasse, the case will be brought to the Admissions Panel meeting, where either the Panel will make a decision, or escalate it to the Councils or the Executive Board.
- 6. The applicant will be updated and informed if the application is a positive recommendation or not, based on the clarifications.
- 7. Where appropriate, applicants can re-submit their application based on changes they have made as a result of feedback from the Alliance. If this is done within 6 months of the initial rejection, a new application does not need to be submitted. Instead, the application will restart at the point in the process at which it was denied.
- 8. There is no limit to the number of times a company can apply for membership. However, the company must demonstrate significant changes have been made in accordance with the rejection feedback. The applicant can re-apply to the MACH Alliance after a minimum 6-month period from the application date.



Appeal Process

Following a call with the admissions panel to understand the rejection fully, applicants who are not satisfied with the reasoning may appeal the decision by following the process outlined below:

- → Submission of a Formal Appeal: The applicant must initiate the appeals process by submitting a formal written appeal to the MACH Alliance Executive Board. This document should clearly state the reasons for the appeal, provide any relevant supporting evidence, and be submitted within 30 days of the initial decision notification.
- → Review of Appeal: Upon receipt of the appeal, the Executive Board will conduct a thorough review of the applicant's original application, the admission panel evaluations and the new information provided in the appeal. This process is expected to take approximately 30 days.
- → Notification of Decision: Following the review, the applicant will receive a written notice of the Appeal Decision. If the appeal is successful, the notice will include the date of admittance into the MACH Alliance. If the appeal is denied, the notice will provide a detailed explanation of the decision.

Please note that the decision of the Executive Board on the appeal is final.



Contributing To Our Core Values

Upon application, you will be asked to provide a short statement for each of the following Alliance values to demonstrate how your organization can contribute to and enhance the work we do.





1st Evaluation

Application Form



1st Evaluation Criteria Scoring & Evaluation

Initial assessment

Applicants fill out an application form in order to initiate the process. More details can be found on the MACH Alliance website: <u>https://machalliance.org/application-member</u> or potential applicants can contact applications@machalliance.org to request an application form.

Every application is checked to verify completeness. The applicant is contacted with an NDA and any additional requests.

After reviewing your application, we will book a discovery call. Discovery sessions typically consist of the following:

- \rightarrow 5 mins of Introductions, explaining the process and clarification of what to expect on the call
- \rightarrow 20 mins Q&A by the panel
- \rightarrow 5 mins Q&A for the applicant

Evaluators will later regroup to complete and finalize the scoring and make a decision whether to proceed or reject the application. Criteria for each of our categories are outlined on pages 8-10.



1st Evaluation Weighted Scoring | Boutique SI / SI / GSI

Criteria	Boutique SI	SI	GSI
Total company headcount	5%	10%	10%
MACH vendors partnerships agreements	5%	10%	10%
Total certified engineers/architects	5%	15%	15%
AWS/GCP/Azure Partnerships	5%	10%	10%
Revenue	10%	10%	10%
Marketing examples that demonstrate thought leadership in the space	15%	5%	5%
Examples of giving back to the community	10%		
Commitment to MACH principles	10%	10%	10%
Case studies	20%	20%	20%
Uniqueness to MACH space	15%		
Vendor recommendations		5%	5%
Dedicated CoE		5%	5%



1st Evaluation Weighted Scoring | Start-up ISV

Criteria	Startup
Between \$2M and \$10M in annual license GMV and/or > 30 employees	5%
Marketing examples that demonstrate thought leadership in the space	5%
Have at least three different microservices with their own domain	10%
Have 100% API coverage, built API-first, REST/graphQL support	15%
Is multi-tenant SaaS versionless, upgrade-free	15%
Live projects with at least 2 other MACH ISV members	15%
Case studies	30%
Healthy growth & investment trends	5%



1st Evaluation Weighted Scoring | ISV

Criteria	ISV
Total company headcount	5%
Enterprise Scale (>15 customers more than \$100M turnover)	15%
3 Public Enterprise References in 2+ geographical regions	15%
Revenue	5%
Marketing examples that demonstrate thought leadership in the space	5%
Is multi-tenant SaaS versionless, upgrade-free	15%
Have 100% API coverage, built API-first, REST/graphQL support	15%
Case studies	15%
Have at least three different microservices that each have their own domain	10%



1st Evaluation Weighted Scoring | Enabler

Criteria	Enabler
Solution enables MACH architecture	35%
Customer facing API's: REST or GraphQL, and software configuration entirely automatable	10%
It is offered only as a SaaS solution and upgrades require zero downtime	10%
Enables at least 3 enterprise grade MACH solutions, or customers, with at least with at least 2 live projects with other MACH ISV member companies	30%
Marketing coverage regarding MACH, headless composable	5%
At least 5 ISV partners with 100M in revenue	10%



2nd Evaluation

Technical Assessment



2nd Evaluation - Technical Assessment Scoring & Evaluation Approach

Summary

Application sessions take place during pre-scheduled time slots. This allows the alliance to be transparent about the timelines for application and allows the panel members to schedule their participation in advance. Full disclosure of what the session will entail as well as guidelines of what to prepare and who to invite is shared with the applicant. SI members can assess ISV and vice versa. Enabler members are able to assess all types of applicant though this may depend on the type of enabler they are. This ensures fairness and objectiveness in our selection process. A minimum of two evaluators (the assessment team) with an average score of 90% is required before an application is treated as a positive recommendation.

A 90 minute session typically consists of the following:

- \rightarrow 5-10 mins of introductions, explaining the process and clarification of what to expect on the call
- \rightarrow 50-55 mins presentation with a mandatory set of topics for the applicant to cover
- \rightarrow Q&A by the assessment team throughout

Evaluators will later regroup to complete and finalize the scoring and make a decision whether to proceed or reject the application. Criteria for each of our categories are outlined on pages 8-10.



Technical Assessment Boutique SI / SI / GSI



2nd Evaluation Tech Scoring & Evaluation | Boutique SI

Boutique SIs are specialized firms that offer highly tailored composable solutions and focus on specific industries or niche areas, providing personalized services to their clients. We are seeking agencies that are pioneering innovative applications of MACH technology or exploring unconventional use-cases.

The criteria that a Boutique SI is required to have:

- \rightarrow A headcount greater than 25+ people
- → Executed partnership agreements with three MACH Vendors
- \rightarrow Executed partnership agreements with one of either AWS, GCP, or Azure
- \rightarrow 3 clients with total revenue of \$500M or more on MACH/composable work
- → 2 recent MACH-ready marketing content examples that demonstrate thought leadership in the space
- → 2 examples of giving back to the MACH community through either open-source projects or working with other MACH vendors
- → Demonstrate your current commitment to MACH-based principles, with an outline of the percentage (%) of work that is MACH-focused
- → Case studies that should cover three public enterprise MACH references customers willing to speak publicly about how you helped them move hosted solutions / on premise architectures to composable SaaS architecture
- \rightarrow An outline of why you feel that you're unique to the MACH SI Boutique space
- \rightarrow Recommendations from 2 MACH Alliance vendors



2nd Evaluation Tech Scoring & Evaluation | SI

SIs are firms that specialize in integrating different hardware and software components to create functional systems. Organizations are experts in design, implementation, and maintain integrated systems to meet specific business or technological needs, optimizing efficiency and productivity for their clients.

The criteria that an SI is required to have:

- \rightarrow A headcount greater than 250 people
- \rightarrow Executed partnership agreements with four MACH Vendors
- \rightarrow Executed partnership agreements with one of either AWS, GCP, or Azure
- \rightarrow 3 clients with total revenue of \$800M or more on MACH/composable work
- → 3 recent MACH-ready marketing content examples that demonstrate thought leadership in the space
- → Demonstrate your current commitment to MACH-based principles, with an outline of the percentage (%) of work that is MACH-focused
- → A dedicated CoE focused on engineering and architecture with a centralized MACH membership management
- → Case studies that should cover five public enterprise MACH references customers willing to speak publicly about how you helped them move hosted solutions / on premise architectures to composable SaaS architecture
- → Recommendations from 3 MACH Alliance vendors



2nd Evaluation Tech Scoring & Evaluation | GSI

MACH SIs possess the knowledge and capabilities to offer consultation, architectural design, implementation, integration, and management services for contemporary, composable technology ecosystems. A Global System Integrator (GSI) excels in this domain, boasting a substantial composable practice and a client base spanning North America, Europe, and an additional continent.

In a GSI we're looking for a strategy to scale/industrialize composable, with a focus on strategy, capacity and capability driven by leadership. In addition, a GSI must have:

- \rightarrow A minimum headcount of 5000
- → 10 public enterprise MACH references with a minimum of two MACH technology components or two ISV MACH member solutions and willing to speak publicly about you
- \rightarrow Executed partnership agreements with at least five MACH vendor member companies
- \rightarrow Executed partnership agreements with AWS, GCP and Azure
- \rightarrow At least 5 clients with total revenue of \$1B or more on MACH/composable work
- → At least 5 recent thought leadership publications (company authored) about MACH technology
- → A dedicated Center of Excellence focused on engineering and architecture with a centralized MACH membership management
- \rightarrow A recommendation from at least 5 MACH Alliance vendors



2nd Evaluation

Tech Scoring & Evaluation | Boutique SI / SI / GSI Case Studies & Public References

Case studies includes customers willing to speak publicly about how the SI helped them move hosted solutions / on premise architectures to composable SaaS architecture.

Each case study should include:

- \rightarrow Customer details, sector, size, B2B, B2C etc
- → Problems and challenges that MACH/Composable Architecture is trying to solve, desktop e-commerce, Omnichannel, IoT, more Agility etc. In addition, how MACH has unlocked business opportunities
- \rightarrow Some NFRs e.g. site visits, performance
- → Implemented Architecture high-level diagram with vendors' suppliers showing how the architecture is held together
- → Your role/scope in the implementation were you prime on the project or just implementing a specific software or building the storefront
- \rightarrow The current state of the project: complete or plans for further development
- \rightarrow Details of the delivery team: composition, technology stack, etc.
- \rightarrow Total of 3 case studies with at least one transition from a monolith to MACH
- → Demonstrable live customers are favored



2nd Evaluation

Technical Assessment ISV / Start-up



2nd Evaluation Tech Scoring & Evaluation | ISV / Start-up

Requirements from the applicant

Access to API documentation.

A full list (in writing) of all products and services that are sold by your company.

A presentation that covers the following topics per product:

- \rightarrow High level business or technical capabilities provided by the product; or high level features
- → Services describe the different domains and microservices: component and/or logic architecture diagrams
- \rightarrow Upgrades how they are performed internally, and how they are rolled out through your estate
- → Deployment strategy and environment assignment (how multi-tenancy is managed)
- \rightarrow Integrations how does data get into and out of the system
- → Extensibility web-hooks, events



2nd Evaluation Tech Scoring & Evaluation | ISV / Start-up

Platform or Portfolio companies

Whilst each ISV provides a different set of solutions that are targeted to a market, some offer these solutions as different products under a platform or brand.

In the cases when an ISV has more than one product (as advertised on their marketing material, and licensing), each product should be evaluated independently, following the same assessment process for each.

Each product must have a passing score of 90% (this figure may change) to receive a positive recommendation. Exceptions may apply to legacy products - see our legacy vendor terms in Section 4, page 43.



2nd Evaluation Tech Scoring & Evaluation | ISV / Start-up

Tech Check sessions

The tech check must cover the technical aspects of the solution (based on the evaluation criteria), and how each product is integrated as part of a composable ecosystem (MACH or not). The assessment should cover the following points:

<u>40 mins - MACH compliance assessment</u> based on the presentation.

<u>25 mins - Case studies</u> to showcase how your product(s) are part of a composable ecosystem; how they integrate and enable the benefits of MACH. Case studies should include architectural diagrams of the whole ecosystem:

- \rightarrow Flagship case study representing your best implementation (15 mins)
- \rightarrow 2 further case studies demonstrating how your product is part of a composable ecosystem (10 mins)

<u>25 mins</u> - Quick demo of the main features of your platform. As part of the demo expect that the assessors ask how a feature on the UI is delivered through public APIs. It will be expected that it can be demoed through Postman or a similar tool.



2nd Evaluation MACH Compliance Assessment | ISV / Start-up

Assessment areas

The assessment covers different technical areas that ensures a product follows the MACH principles and showcases how composability is enabled. These are the areas covered by the assessment:

- \rightarrow Microservice architecture
- \rightarrow APIs coverage for: data models, integration, platform management and features triggering
- \rightarrow Cloud Native SaaS solution
- \rightarrow Headless/optional heads
- → Composability
- \rightarrow Case Studies (3 key case studies)

Each area is evaluated within a scale of four brackets, that provides a consistent measurement across different vendors. For example, in the case of Cloud Native:

SaaS solution - Cloud Native - On Cloud	Complies with SaaS and Cloud Native Definition, it uses either a public or private cloud and all infrastructure is managed using code and automation.
SaaS solution - On Cloud	Complies with SaaS definition, but infrastructure components do not follow cloud native definitions, but all of it is managed using infrastructure as a code (IaC)
SaaS solution - Cloud Native	Complies with SaaS definition and follows Cloud Native approach; however, the solution is hosted on private data centres
No SaaS / No On Cloud	Does not comply with SaaS approach or is not deployed on a cloud

Technical Assessment Enabler



2nd Evaluation Tech Scoring & Evaluation | Enabler

How to identify an Enabler

An Enabler is a product(s) that when implemented delivers a technical capability that the business can consume.

In other words, the product, once it has been setup can't be used to deliver value directly to the customer; however, it allows businesses to create that value.

Enablers are used to compose the ecosystem rather than using them as an alternative to build business capabilities.



2nd Evaluation Tech Scoring & Evaluation | Enabler

Requirements from the applicant

A full list (in writing) of all products and services that are sold by your company.

A presentation that covers the following topics per product:

- \rightarrow High level business or technical capabilities provided by the product; or high level features
- → Services describe the different domains and microservices including component and/or logic architecture diagrams
- \rightarrow Upgrades how they are performed internally, and how they are rolled out through your estate
- → Deployment strategy and environment assignment (how multi-tenancy is managed)
- \rightarrow Integrations how does data get into and out of the system
- → Extensibility web-hooks, events

Functionality: describe the area in which the enabler enables MACH applications. This must focus on at least one of the acronyms (MACH). So it could enable microservices for the data store, or communications etc, headless for acceleration of build, UI capabilities, build, CI/CD. Cloud Native could involve deployment enablers or resilience, scalability etc.

Developer experience: How does it help the developer of a MACH architecture?

Community: Is the community active and are they actively discussing integrating into MACH architectures?



2nd Evaluation Tech Scoring & Evaluation | Enabler

Tech Check sessions

The tech check must cover the technical aspects of the solution (based on the evaluation criteria), and how it is integrated as part of a composable ecosystem (MACH or not). The assessment should cover the following points:

40 mins - MACH compliance assessment based on presentation

<u>25 mins - Case studies</u> showcase how your product(s) are part of a composable ecosystem; how they integrate and enable the benefits of MACH, case studies should include architectural diagrams of the whole ecosystem

- Flagship case study representing your best implementation (15 mins)
- 2 further case studies demonstrating how your product is part of a composable ecosystem (10 mins)

<u>25 mins - Quick demo</u> of the main features of your platform. As part of the demo expect that the assessors ask how a feature on the UI is delivered through public APIs. It will be expected that it can be demoed through Postman or a similar tool.



Executive Board Approval



Final Review Executive Board approval

The Executive Board exists to ensure the MACH Alliance remains true to its vision, mission and values by providing strategic direction and decision-making. There are currently nine seats on the Executive Board. All seats have a two-year tenure. For the details of the current Executive Board visit the website.

The process - All application documentation up to that point is shared with the Executive Board members. Members are encouraged to ask questions of the Admissions Panel and their fellow Executive Board members over a five day period. In some cases, an application may be referred back to the Admissions Panel for an additional technical assessment. After that time, they are required to cast their yes/no vote. The majority vote decision is final. All discussion and voting is recorded on our project management system.

What the Executive Board consider - Executive Board members will be looking at the technical assessment with a critical eye. They are there to sense-check the application up to this point and raise any concerns they have. Executive Board involvement increases based on the characteristics of the applicant, for example larger companies with more complex portfolios or those companies that are dealing with legacy product. They are also responsible for raising any concerns they have based on external factors, for example, specific to a company's leadership or finances. In these cases, any concerns will always be put to the applicant in question.

Lastly, the Executive Board consider new and unique cases. As a continually evolving category, there are always new discussions to be had. In these, the Executive Board leans on past protocol and internal expertise to come to clear decisions. Those are then fed back into the criteria and this playbook.



4 - Special Cases

Special Cases Complex Cases

As part of the process, we have a system in place to identify complex applications upon entry. Once these applications are flagged, we will assign an Executive Board member to the case. Their role will be to facilitate a fair and robust evaluation process, ensuring due diligence around cases outside of standard applications. All applicants will be notified if their application has been categorized as such.

Definition of a complex case:

- \rightarrow Multi-product
- \rightarrow Legacy product(s)
- \rightarrow Global, \$100mil+ ARR
- \rightarrow Complex funding structure



Special Cases

Company Acquisitions/Mergers

The Alliance has the following rules regarding company acquisitions and mergers

- → Membership of the MACH Alliance is only possible on a company-wide basis, with the exception of stand-alone entities within larger vendors, provided they meet the criteria on page 43.
- \rightarrow For existing certified members, there are a number of potential paths post merger or acquisition:
 - **No change in status** in the case of a company remaining standalone
 - **No re-certification necessary** one certified member acquiring another certified member though this may have implications for membership fees and C-suite Advisory Board seats
 - **Removal** such as an ISV being absorbed by a much larger non-MACH ISV that is unlikely to reach certification status
 - **Re-certification** process varies depending on the nature and size of the acquisition

Re-certification

- → There will be a clear set of expectations and milestones set out to certify the new entity. The process and criteria is set out in the M&A Process Playbook
- → The company can remain a member with full rights including sponsorship of events and conducting its own 'Power of MACH' events/content
- → In the member directory an asterisk will denote that they are under review due to recent M&A activity until re-certification is complete
- \rightarrow The company is allowed to update its logo and company information in the member directory (if applicable)



Special Cases

In general, the MACH Alliance certifies entire companies. However we recognize that some larger companies may have more of a portfolio approach and have independent entities as part of their business. In order to continue to provide clarity to the market and showcase more of the MACH ecosystem, we now allow such independent entities or brands to apply as long as they remain true to MACH architectural principles, interoperability and a 'best of breed' approach, and meet the following conditions:

- 1. Distinct Brand and Identity: Independent brands must possess a distinct brand identity, separate from other offerings within the parent company. Only the sub-brand certified will be able to use MACH Alliance branding and assets in its marketing and content.
- 2. Distinct Product(s) and/or Services: The brand should offer distinct products or services, separate from the parent company offering, showcasing its unique value proposition and MACH credentials.
- 3. Independent brand Executive Team: To ensure autonomy, brands must have their own dedicated leadership team.
- 4. External Brand Presence: The brand product/s or service/s should be marketed and sold independently, with its own external-facing presence and website.
- 5. Adherence to MACH Principles: Certified brands must align with the open and 'best of breed' approach advocated by the MACH Alliance demonstrated through customer examples. This also includes demonstrating interoperability with products and engaging in thought leadership and strategic partnerships.

The application process follows the existing criteria and categories in all other respects, with the addition of an evaluation step to validate the above characteristics.



Special Cases Applications from legacy vendors

Background

Many of the ISV / Enabler members of the Alliance are relatively new companies who have built their products from scratch adhering to what we now consider MACH principles. Yet, there is also a category of (potential) Alliance members who have a longer history and have/had products that don't follow MACH principles.

To ensure these 'legacy vendors' meet all criteria of the Alliance, an **additional set of non-technical requirements** has been formulated that legacy vendors are asked to respond to as part of their application.

- \rightarrow All products currently offered for sale must be MACH:
 - 'Controlled availability' or another 'gate' for selling non-MACH products isn't strong enough. The product cannot be offered for sale anymore
 - A non-MACH product(s) cannot be on current price lists
 - Customers running non-MACH products can buy additional Central Processing Units (CPUs)/capacity of existing products but not a net new non-MACH product
 - If a customer signs a global contract with the vendor, the customer is able to roll out the non-MACH product to other countries, lines of business, etc but only under that contract, not a new contract



Special Cases

Applications from legacy vendors cont'd

- \rightarrow ARR / license revenue criteria:
 - 100% of new license revenue in the past 6 months must be from MACH-based product(s) only (excludes additional CPUs/capacity from existing customers)
 - A minimum of 70% of total ARR in the past 6 months must be from MACH-based product(s)
- \rightarrow Non-MACH products cannot be marketed, specifically:
 - No public customer references from non-MACH products
 - No case studies or anything from non-MACH products
 - The features listed on their website, feature guides, etc must all be from MACH products
- → The last analyst evaluation from Gartner or Forrester must have been of MACH product(s) only
- → Documentation and other technical collateral in support of existing legacy non-MACH products may still be there but nothing in terms of thought leadership on the non-MACH product. The non-MACH product may still of course be supported
- \rightarrow No feature releases of non-MACH product, only bug/security releases of non-MACH product are allowed





Next Steps

- → Apply to become a member https://machalliance.org/application-member
- → View our current members https://machalliance.org/members
- → Further questions? Contact applications@machalliance.org
- → Follow us on Linkedin https://www.linkedin.com/company/machalliance/
- → Follow us on X https://twitter.com/machalliance?lang=en

Additional resources:

- → <u>The MACH Principles</u>
- → LI Live The Importance of Transparency for a Growing MACH Market
- → <u>The MACH Tech Check Prerequisites for vendors</u>
- → MACH Certification Prerequisites for SIs
- → MACH Certification, a Seal of Confidence
- → What Does it Mean to be MACH Certified
- → MACH Certification Serves as a Vendor Benchmark for the Market Shift to Composable
- → Making the Case for MACH A Complete Guide
- → <u>The New Approach to TCO for Digital Commerce</u>

