

2025 MACH Alliance Global Annual Research

Annual Survey of Global IT Decision Makers



MACH
ALLIANCE

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



Executed by M·E·L Research



Background & Objectives

The MACH Alliance, a global authority on composable, open, and MACH architectures, drives industry standards and fosters innovation through education, certification, and collaboration. Now in its fifth year, this annual report provides critical insights into MACH adoption, challenges, and advancements, equipping businesses to achieve transformative, future-proof digital strategies.

- Measure and monitor progress in transitioning to composable and MACH architectures,
- Identify the drivers and benefits of MACH adoption,
- Identify barriers to MACH architecture uptake,
- Understand the experiences and attitudes of organizations in transition,
- Understand the impact of external pressures upon innovation efforts,
- Understand attitudes towards the adoption of Artificial Intelligence (AI).

Methodology

A quantitative online survey was drafted collaboratively between the MACH Alliance and M·E·L Research.

The survey was distributed via a leading online access panel partner.

Results were then analyzed by M·E·L Research and findings are outlined in this report.

N.B. Australia has been added to the survey this year – please bear this in mind when comparing data from this Wave 5 (Oct 2024) and Wave 4 (Dec 2023).

The 10-minute survey was programmed in-house by M·E·L Research.

Data cleaning, processing and tabulation was undertaken internally by M·E·L Research.

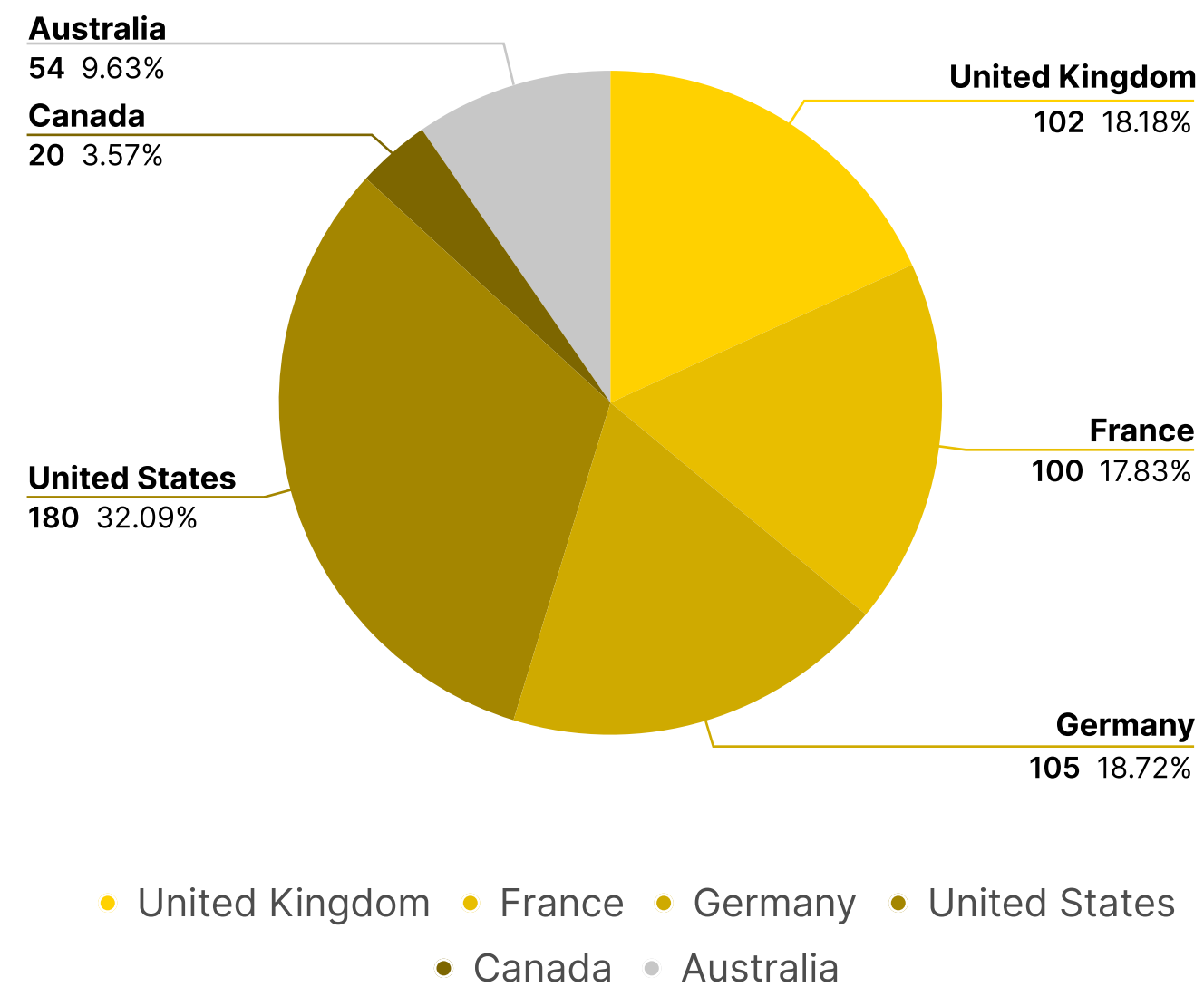
N.B. Only valid responses have been analyzed and reported. For example “Don’t know” and “Not applicable” responses have not been reported.

N.B. In this Wave 5, North America includes the US and Canada. In Wave 4 North America included the US only. Please bear this in mind when comparing data.

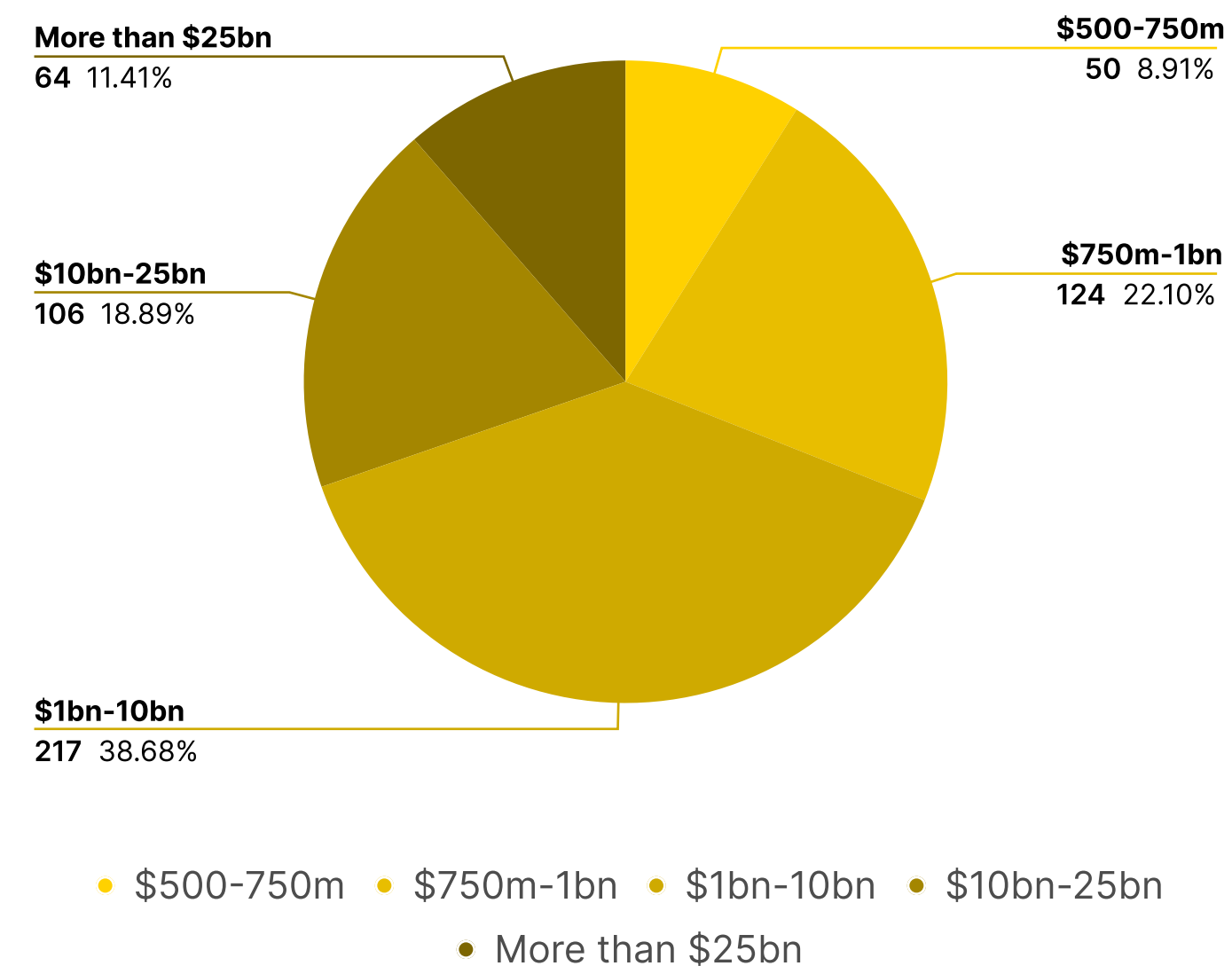
Methodology

561 IT decision makers working in organizations with 5,000+ employees and at least \$500m global annual turnover.

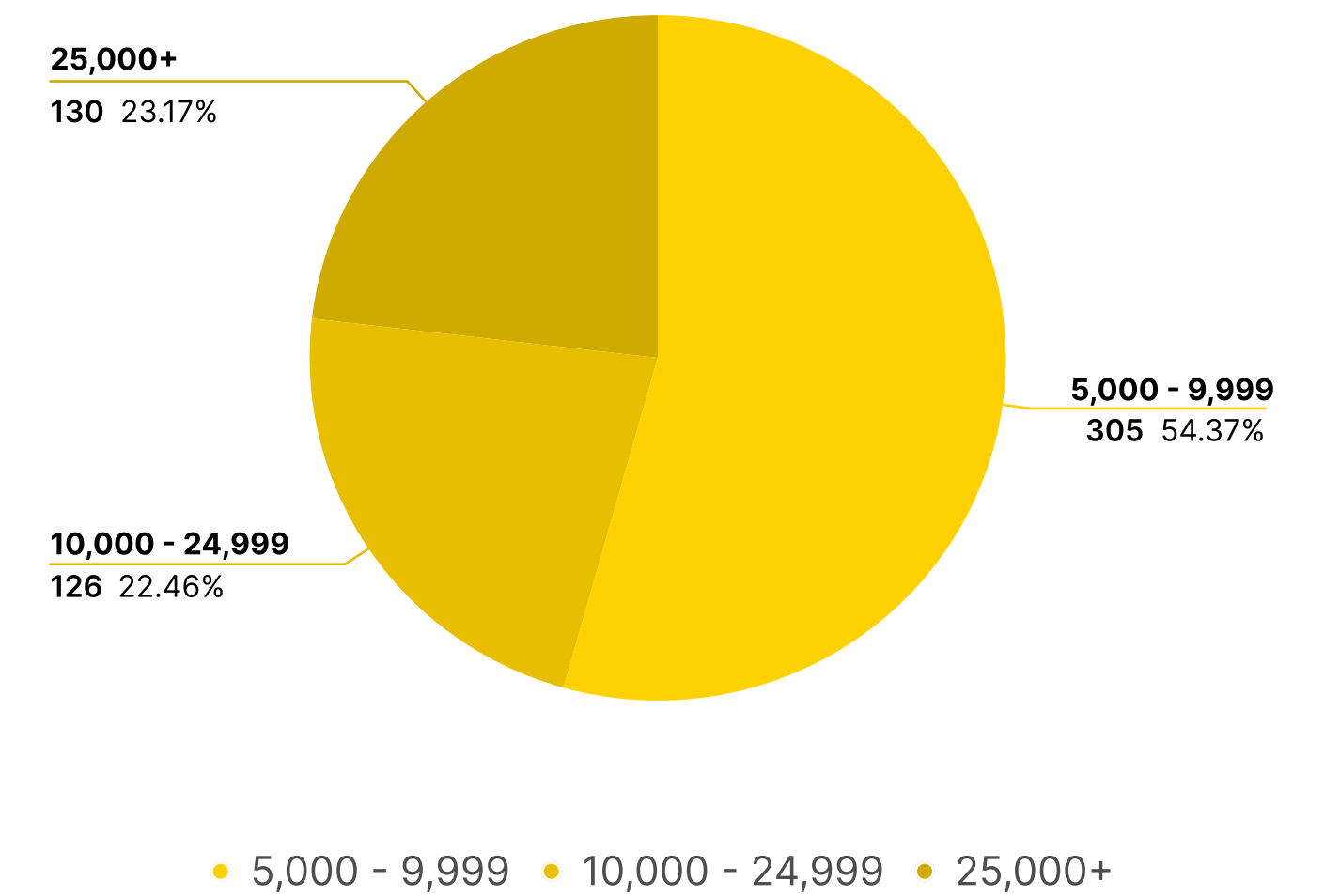
Country



Global annual turnover



Number of employees

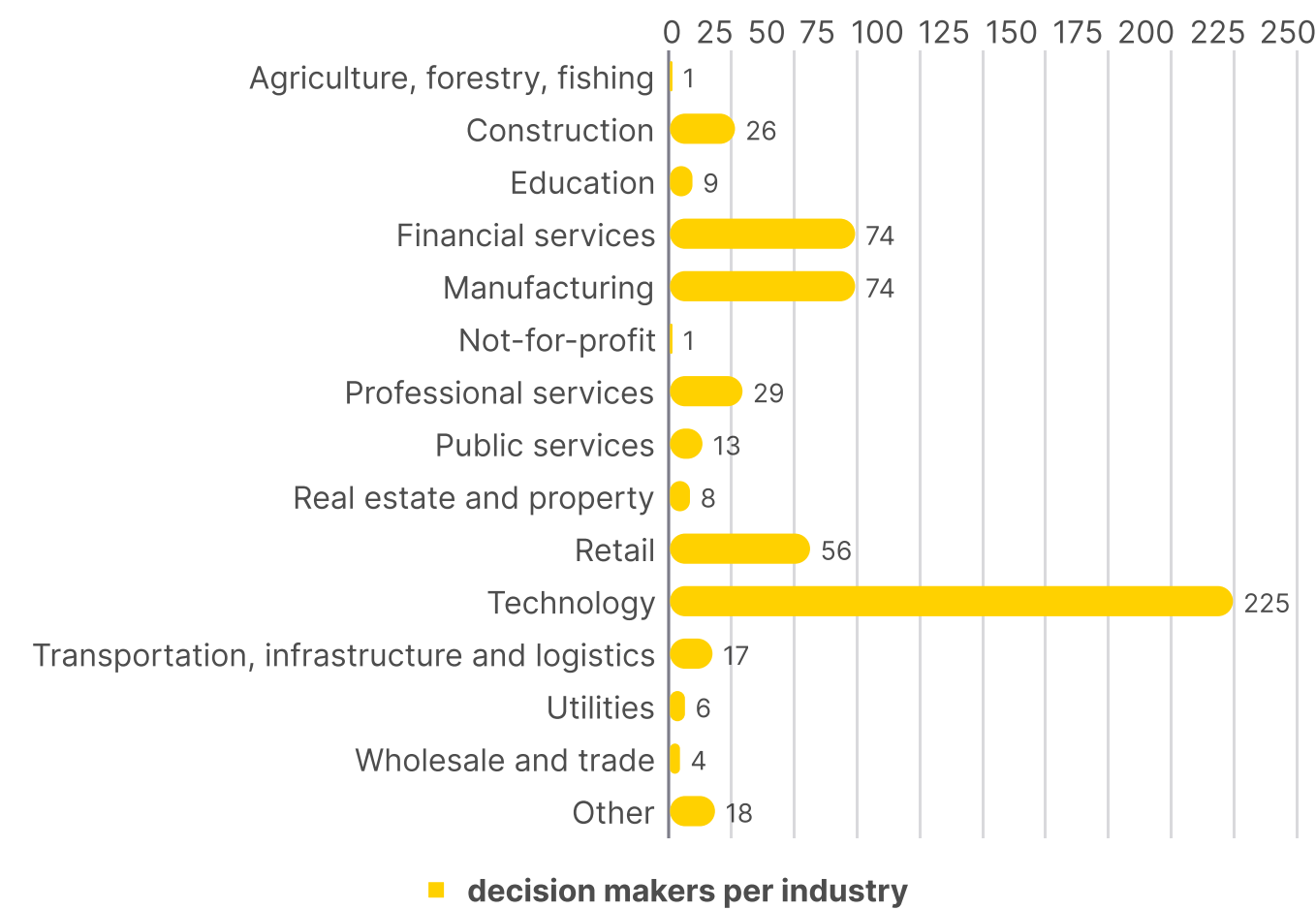


S01 Country, S06 Global annual turnover, S03 Number of employees

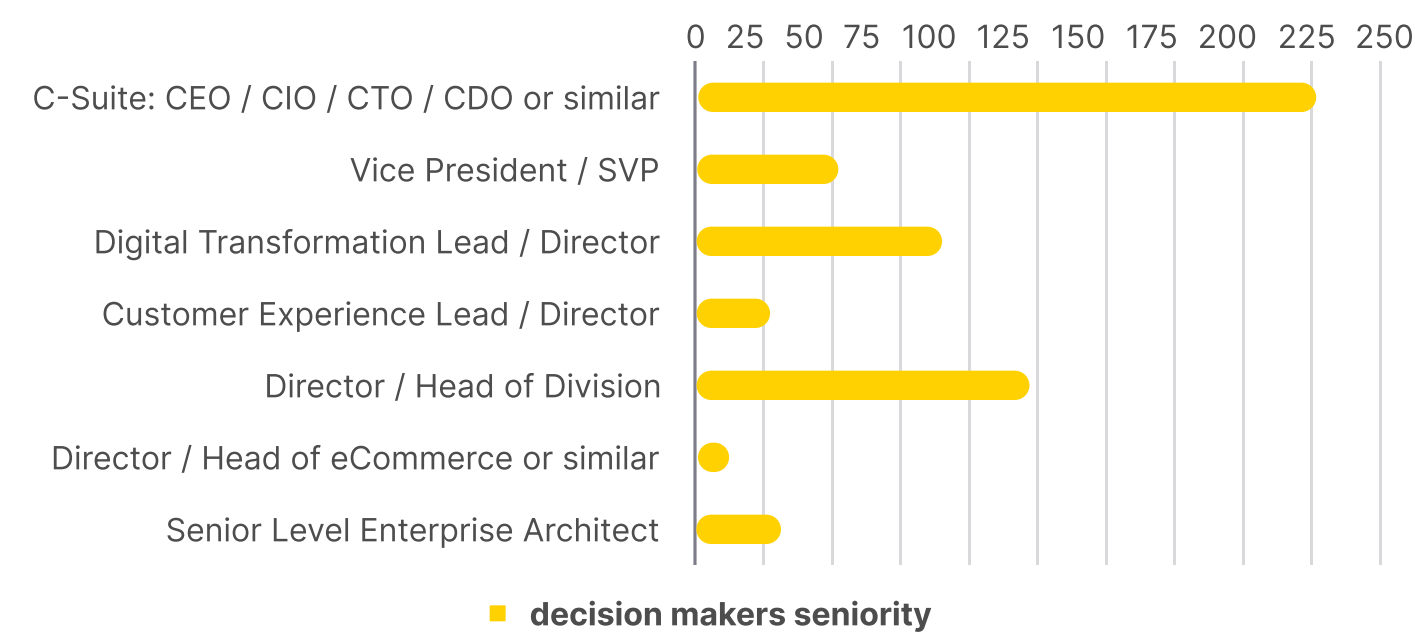
Sample & Demographics

561 IT decision makers working in organizations with 5,000+ employees and at least \$500m global annual turnover.

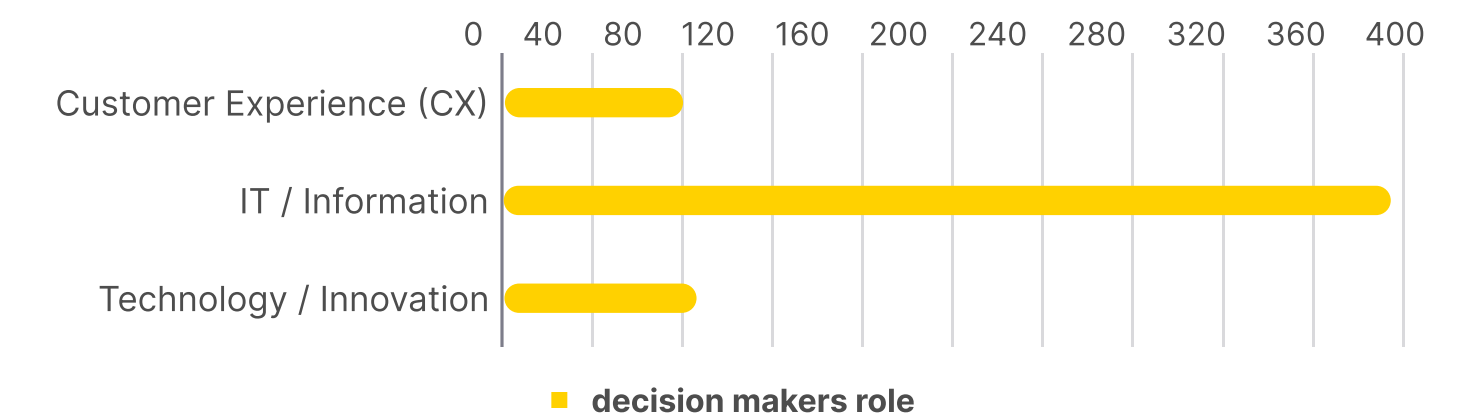
Industry



Seniority



Role



⚠ N.B Base sizes for Financial services, Manufacturing, Retail, and Technology are large enough for analysis and have been included as data splits throughout the report. The base size for Professional services (29) is low but large enough to be indicative, and so has also been included in the report – however, please bear the low base size in mind when interpreting findings

Definitions

Definitions were provided throughout the survey to ensure participants were clear on terminology and used the same frame of reference as one another.

This year, the definition of MACH was expanded to include the definition of composable architecture. Acknowledgement was given to the interchangeable use of both these terms

- **MACH***: The acronym stands for Microservices-based, API-first, Cloud-native SaaS and Headless and is used to describe modern (composable) business software. This is in comparison to legacy monolithic software that has versions, needs upgrading and runs on premise or is hosted.
- **Composable architecture***: This is a modular pattern for software that allows for building, using and re-use of self-contained software components.
- **The terms 'MACH' and 'Composable architecture'** are often used interchangeably in the industry and so please consider both definitions throughout the survey.
- **Monolithic architecture**: This is an integrated design approach for software where all components need upgrading.
- **Front-end architecture**: We refer to the presentation layer or those parts of the IT infrastructure which are visible to the end-user.
- **Back-end architecture**: We refer to the aspects of the IT architecture which support the front-end, including the server, application, and database, which aren't visible to the user.
- **Artificial Intelligence (AI)**: We mean technology that can learn, solve problems, reason and act in a way that approximates human intelligence.

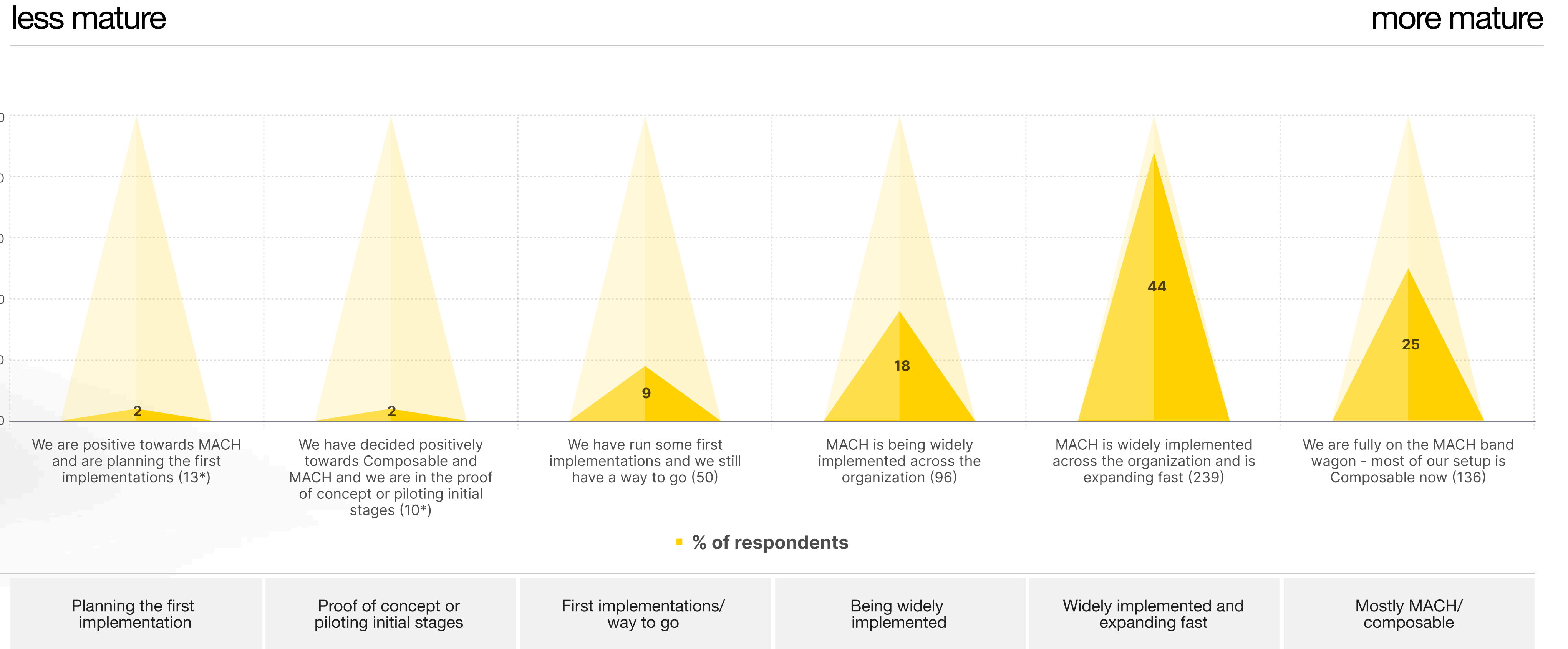
* For the purpose of the survey, MACH and composable architecture were treated as interchangeable to simplify terminology for respondents. However, the MACH Alliance recognizes that MACH represents a specific subset of composable architecture.

An aerial photograph of a city center. In the center, there is a large, circular green lawn. Surrounding it are several modern, multi-story buildings with glass facades and unique architectural designs. Some buildings have flat roofs with various structures on them. The city is filled with streets, cars, and other urban infrastructure. The lighting suggests it's daytime, with shadows cast by the buildings.

001 / SETTING THE CONTEXT:

MACH IMPLEMENTATION MATURITY

Over the course of this report, some analysis will focus on the maturity of organizations in terms of their MACH implementation. Respondents were asked to approximate where their organization is on its MACH journey based on a set scale. The maturity curve shown here demonstrates that most organizations have started to implement MACH technology already, but that three-quarters still have a way to go to.

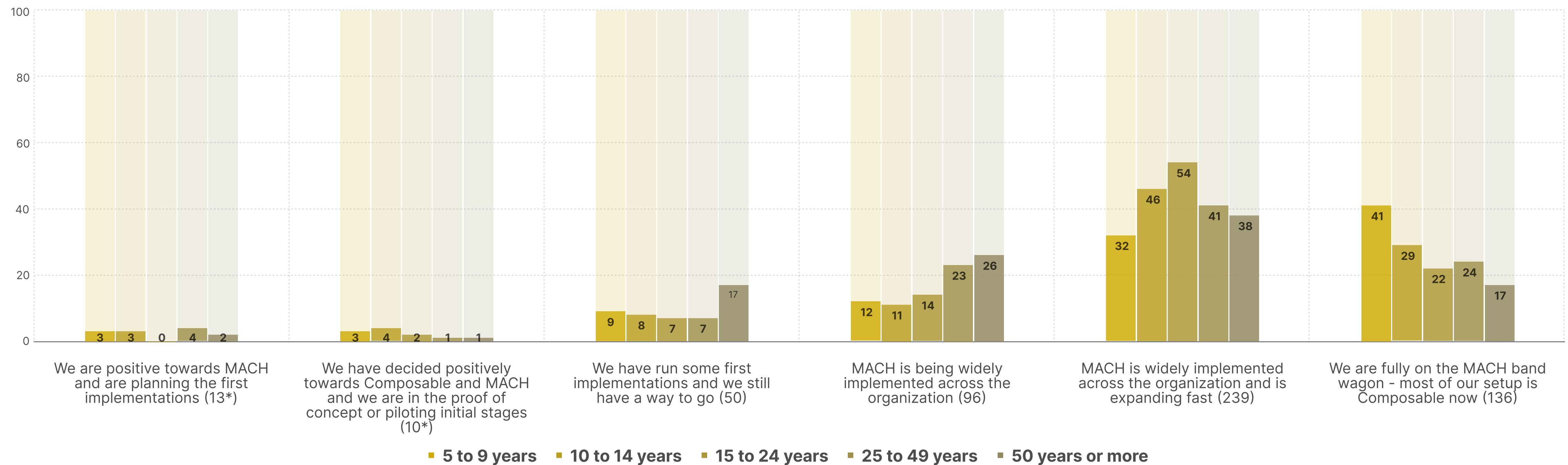


Q21W5. Which of the following statements best describes where you feel that your organization is on their MACH journey?
 Base: 544 – all valid responses for all respondents whose organization has some MACH in infrastructure. * denotes that base sizes are too small to be included in further analysis

Further analysis demonstrates a possible link between an organization's maturity of MACH implementation and the age of an organization. Broadly, the older an organization, the less mature their MACH implementation.

less MACH mature

more MACH mature



(Since the organization has been operating...)

Q21W5. Which of the following statements best describes where you feel that your organization is on their MACH journey?
 Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure. * denotes that base sizes are too small to be included in further analysis



002 /

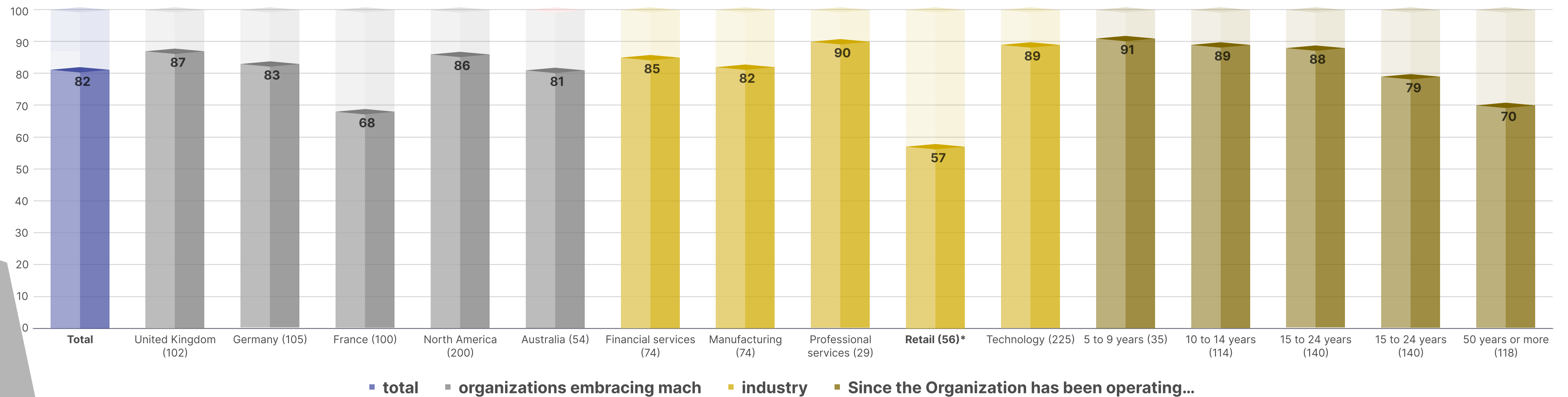
MACH ADOPTION TRENDS

Organizations are embracing MACH.

Eight in ten organizations have become more positive towards MACH in the last year.

Organizations in the UK and North America, and in professional services, and technology, are most positive. Those in France and retail are less likely to feel positive. The younger an organization, the more positive it is likely to be towards MACH – older organizations are finding it harder to change. With older organizations further behind in their MACH maturity, it is also likely they are experiencing less of the benefits so far, potentially impacting attitudes towards MACH.

% much/slightly more positive towards MACH & Composable in past 12 months



! * 39% of retail organizations said their organization's attitude to MACH has stayed the same over the past 12 months

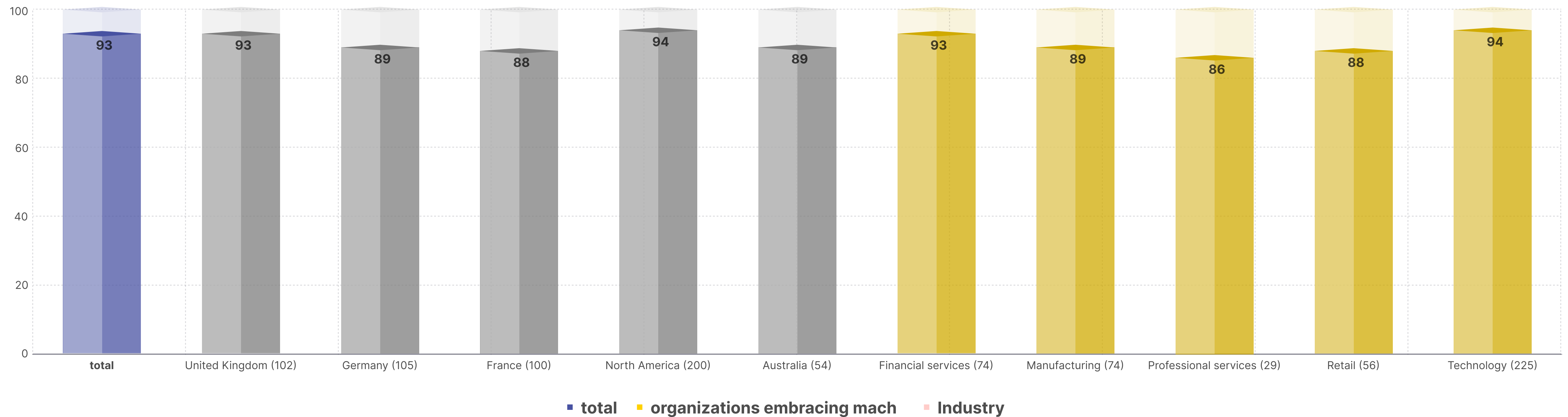
Q25W5: Thinking about the past 12 months, which of the following best describes how, if at all, your organization's attitude towards MACH and Composable has changed?
 Base: Shown in brackets – all valid responses

MACH adoption is on the rise.

Despite some variation in positivity, nine in ten organizations say they have increased MACH infrastructure in the past year.

The increase in MACH infrastructure is consistent across all markets and industries surveyed, suggesting that almost all organizations recognize the benefits of Composable , and MACH technologies.

% much/slightly more positive towards MACH & Composable in past 12 months

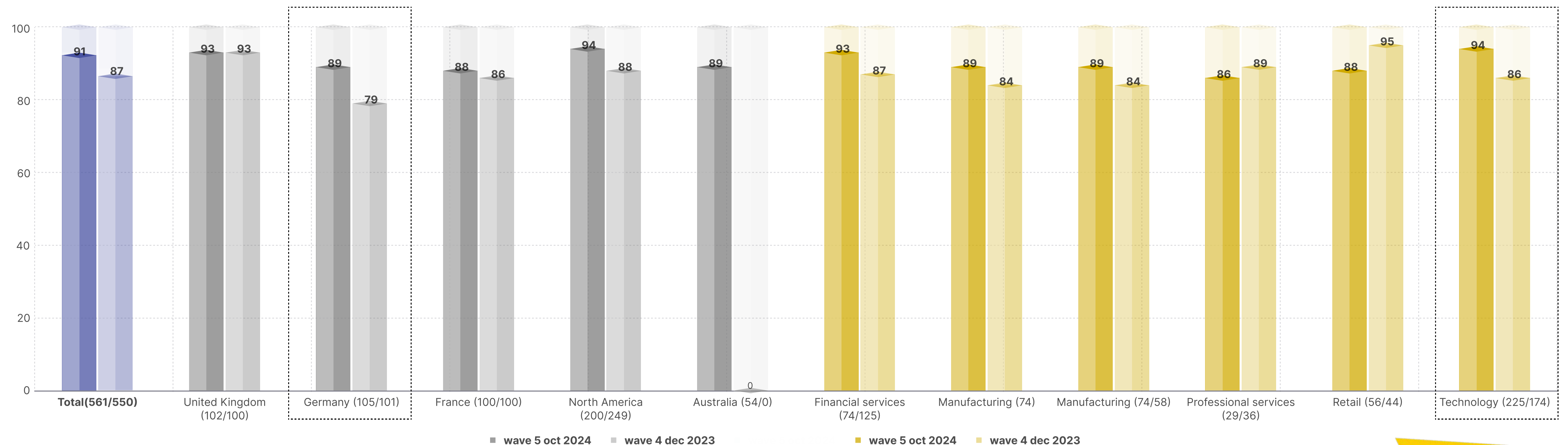


MACH adoption is on the rise.

The proportion of MACH infrastructure in organizations is up slightly since December 2023.

Most organizations clearly see MACH as the future. Compared to last year, MACH infrastructure has slightly increased across almost all markets and industries in the past 12 months. The increase is most notably in German organizations and those in the technology industry.

% much/slightly more positive towards MACH & Composable in past 12 months



Wave 5 question wording: Q02ANW5. How has the percentage of your organization's infrastructure which is MACH changed in the past 12 months?
 Wave 4 question wording: Q02a/2. How have the following changed in your organization in the past 12 months? The percentage of my organization's infrastructure which is MACH has...
 Base: Shown in brackets (Wave 5/Wave 4) – all valid responses



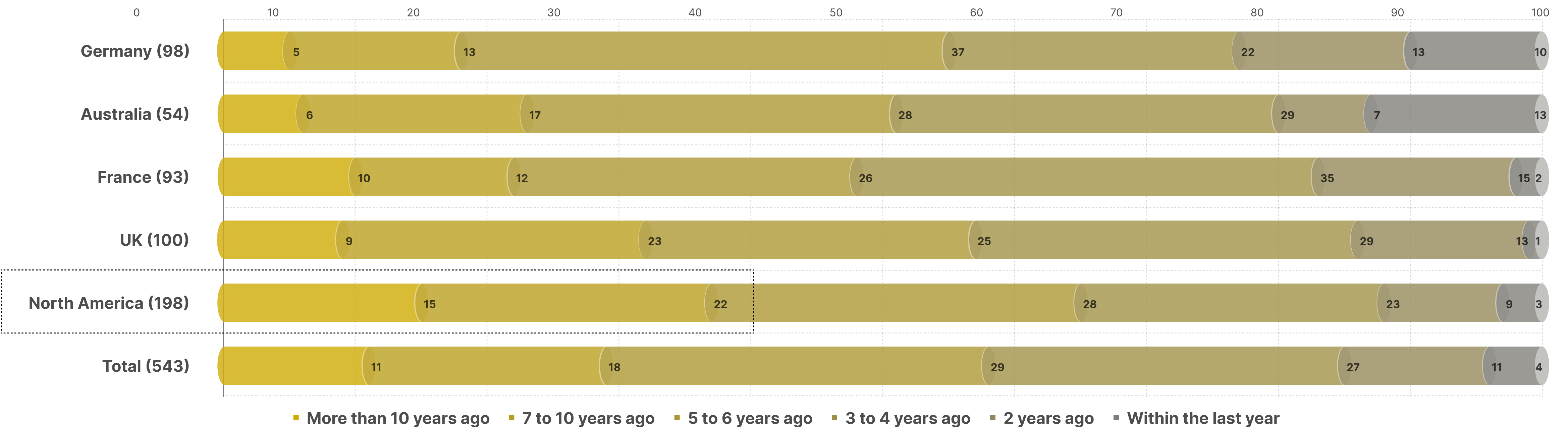
North American organizations lead the way.

Almost two in five (38%) North American organizations began their MACH journey 7+ years ago. In contrast, just 18% of German organizations began their MACH journey within this timeframe.

North American progress is likely driven by the technological advancement of the United States, compared to other countries.

Journey started longer ago

Journey started more recently



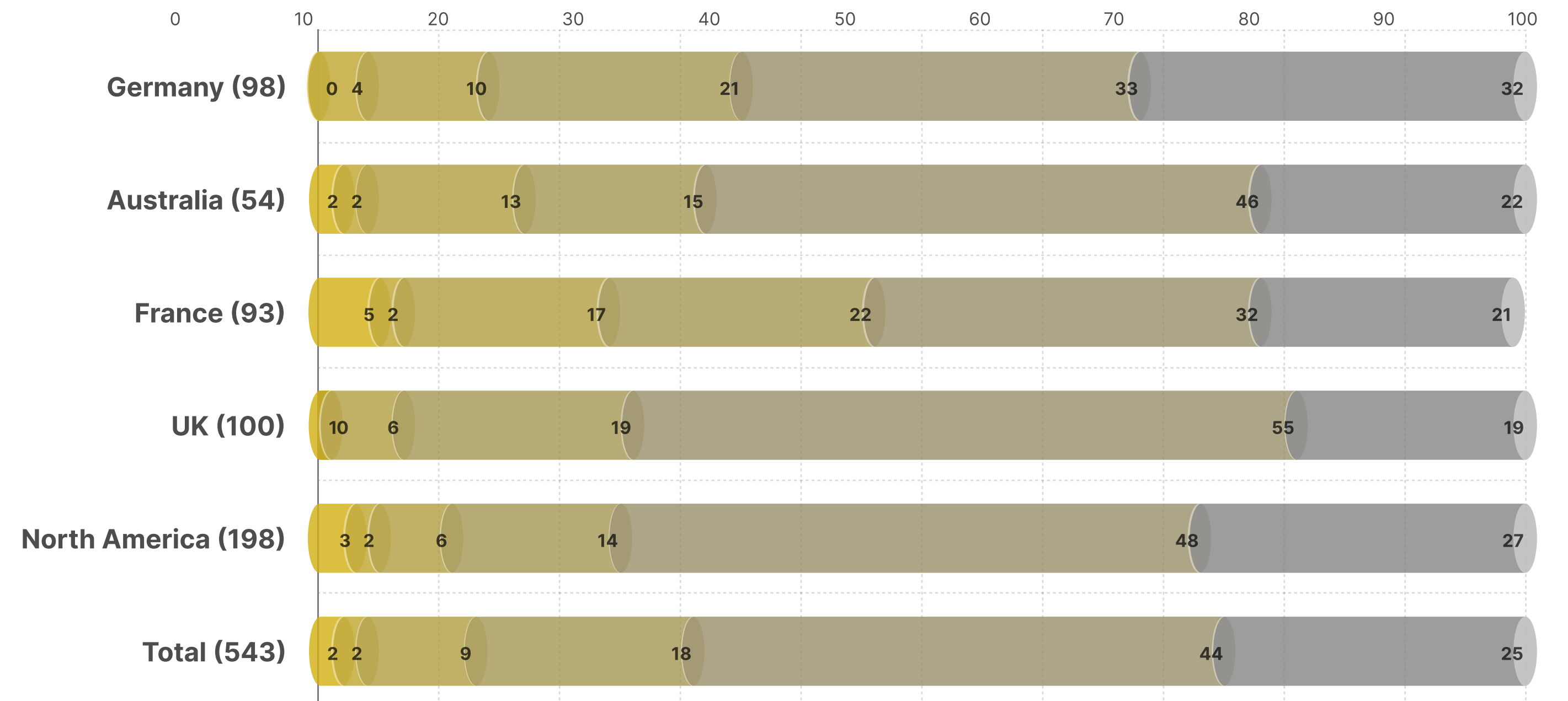
Q02ANW5. How has the percentage of your organization's infrastructure which is MACH changed in the past 12 months?
 Base: Shown in brackets – all valid responses

Despite their later start...

German organizations are advancing more rapidly in MACH adoption, with 32% of their setups nearly fully composable—more than any other country surveyed.

This likely stems from Germany's status as Europe's most technologically advanced country, according to Most Technologically Advanced Countries 2024. However, North American and UK organizations follow closely, with about half or more reporting MACH is being widely implemented and expanding quickly.

less mature more mature



- We are positive towards MACH and are planning the first implementations.
- We have decided positively towards Composable and MACH and we are in the proof of concept or piloting initial stages.
- We have run some first implementations and we still have a way to go.
- MACH is being widely implemented across the organization.
- MACH is widely implemented across the organization and is expanding fast.
- We are fully on the MACH band wagon - most of our setup is Composable now.

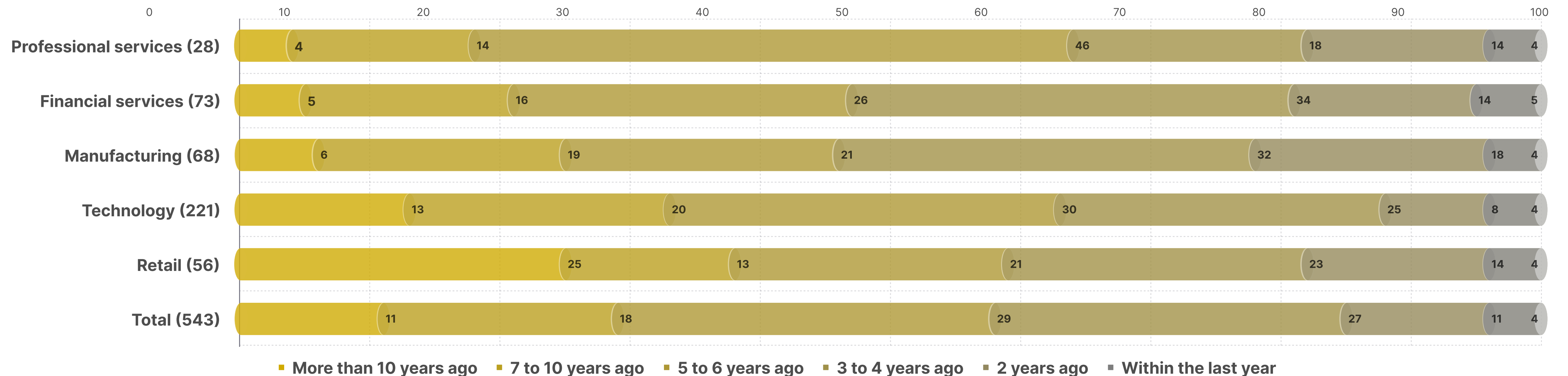
The retail industry leads the way.

Almost two in five (38%) retail organizations began their MACH journey 7+ years ago. This compares to just 18% of professional service organizations.

It is likely that the need to cater to customer omnichannel demand (e.g. online, click and collect, as well as traditional in-store) and therefore keep pace with competitors, meant the retail industry needed to embrace the agility offered by MACH earlier than other industries.

journey started longer ago

journey started more recently




Q20W5. Which of the following best describes when your organization's journey with MACH and composable architecture began?
 Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure
 “Within the last 6 months” was an answer option but was not selected by anyone and is therefore not shown here

Those with furthest to go are spending the most.

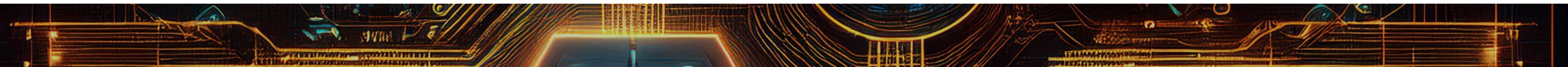
Organizations with a greater proportion of legacy tech are spending significantly more than others on purchasing and implementing MACH, presumably in an effort to catch up.

Those already achieving ROI from MACH are more motivated to spend on MACH as they are experiencing the benefits. The greater apathy towards MACH from older organizations (slide 12) is reflected in their lower % spend.

	Wave 4 Dec 2023	Wave 5 Oct 2024	These organizations are spending significantly more	These organizations are spending significantly less
Average % IT budget spent on purchasing MACH software	40%	39%	51%+ legacy tech (48%) Achieving ROI on MACH (42%) Most MACH mature (48%) Most positive towards MACH (41%)	Started operating 50 years+ (34%) Less than 25% legacy tech (34%)
Average % IT budget spent on implementation of MACH	40%	36%	51%+ legacy tech (42%) Achieving ROI on MACH (38%) Australian organizations (44%) Technology industry (40%) Widely implementing & expanding fast (41%)	Started operating 50 years+ (31%) Financial services industry (31%) Manufacturing industry (27%)

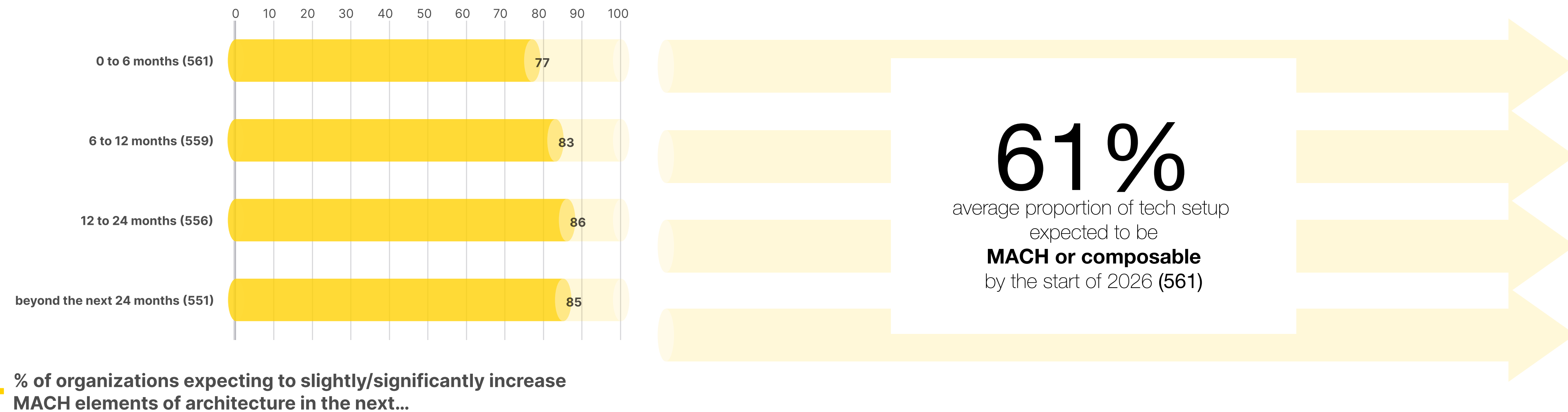
 N.B the differences between Wave 4 and Wave 5 are not statistically significant at 95% level of confidence and so are within the range of normal variation we would expect from survey to survey, when asking respondents to estimate a %

Q02AA. Approximately, what percentage of your overall IT budget is spent on purchasing MACH software, and what percentage is spent on implementation of MACH?
Base: Wave 5 550; Wave 4 533 – all valid responses for all respondents whose organization has some MACH in infrastructure



The proportion of MACH infrastructure is projected to increase significantly by 2026.

This likely reflects the direct experience of MACH benefits many organizations are now experiencing and demonstrates how much organizations have bought into MACH.

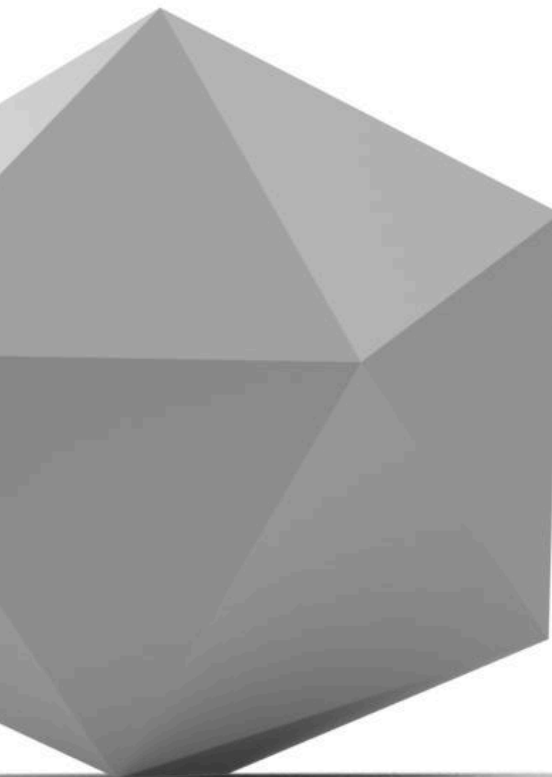


Q02/1. To what extent does your organization intend to increase or decrease the MACH elements of its architecture in the next...?
 Q22W5. Approximately what percentage of your tech set-up do you expect to be MACH or Composable by the start of 2026?
 Base: Shown in brackets – all valid responses from all respondents



There are multiple drivers behind MACH adoption.

Key drivers include customer experience, faster innovation and agility, and enhanced privacy and security are up since last year.



⚠ On average, respondents selected **five drivers of MACH adoption** for their organization

■ Wave 5 Oct 2024 (540) ■ Wave 4 Dec 2023 (545)

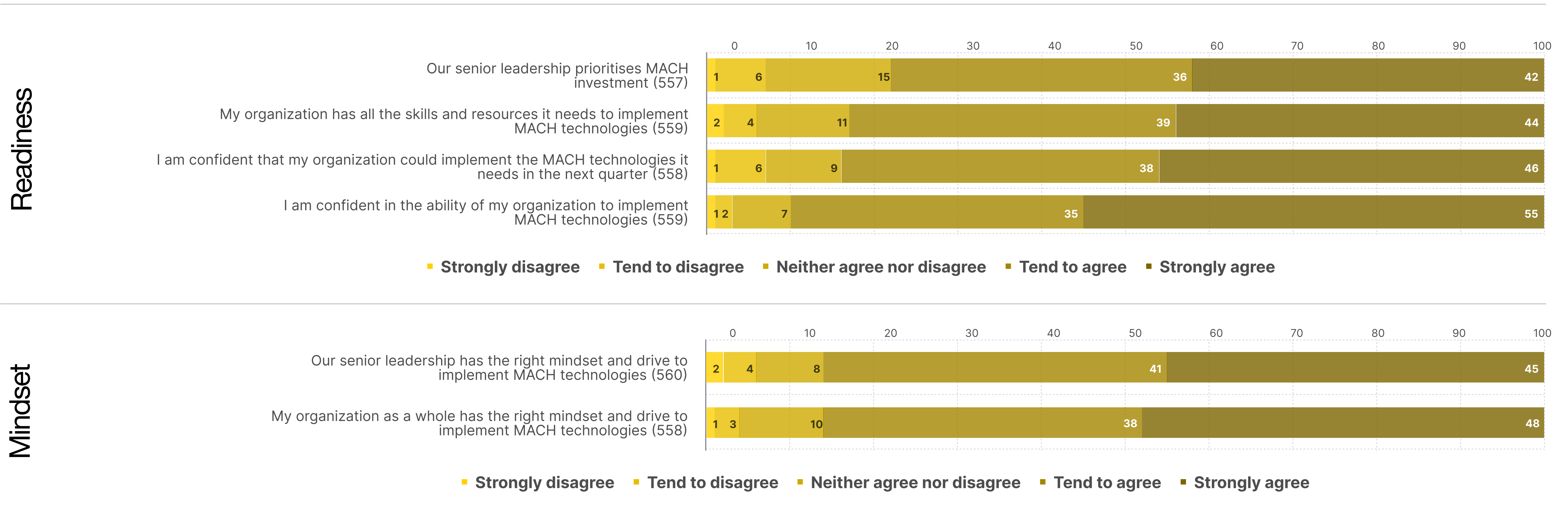
Q20W5. Which of the following best describes when your organization's journey with MACH and composable architecture began?
 Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure
 “Within the last 6 months” was an answer option but was not selected by anyone and is therefore not shown here

003 /

MACH READINESS & MINDSET

Organizations generally have the right mindset, abilities, skills, and resources to implement MACH technology.

Many organizations feel they are “MACH-ready” which further underlines that organizations appreciate the benefits of MACH, and aim to progress implementation.

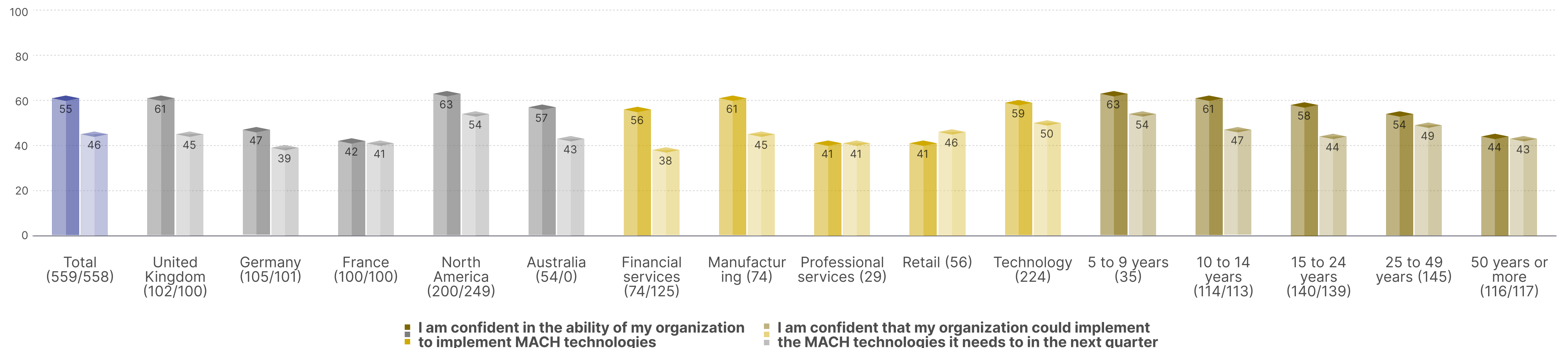


However, confidence around MACH implementation is not yet as strong as it could be.

There is some confidence in organizations' ability to implement MACH generally, but this confidence is lower when specifically asked about the ability to do this in the next quarter.

Organizations in Germany and France, and those in financial and professional services, are least confident about the ability to implement MACH in the next quarter. Organizations in the UK, North America and Australia demonstrate that they are gearing up for MACH, reflecting their progress on MACH adoption (slide 16).

Showing the % that strongly agree with these readiness statements



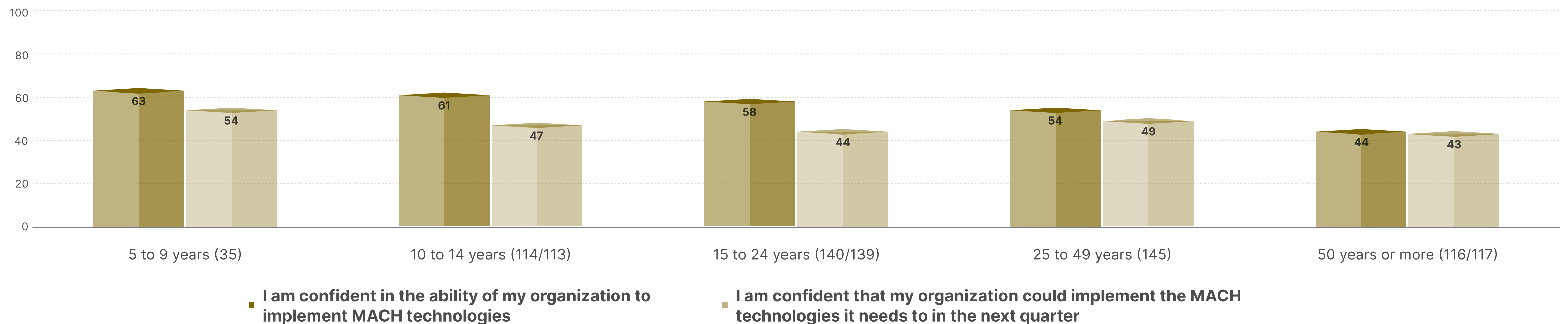
Q20W5. Which of the following best describes when your organization's journey with MACH and composable architecture began?
 Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure
 “Within the last 6 months” was an answer option but was not selected by anyone and is therefore not shown here

Confidence in the ability to implement MACH is lower for older organizations.

This reflects the pattern of positivity towards MACH compared to organization's age.

Older organizations appear to struggle more than younger organizations with MACH readiness. This is likely not just due to mindset, but also caused by the organizations' additional challenges, such as legacy systems and structural constraints, which can impact their MACH journey.

Showing the % that strongly agree with these readiness statements



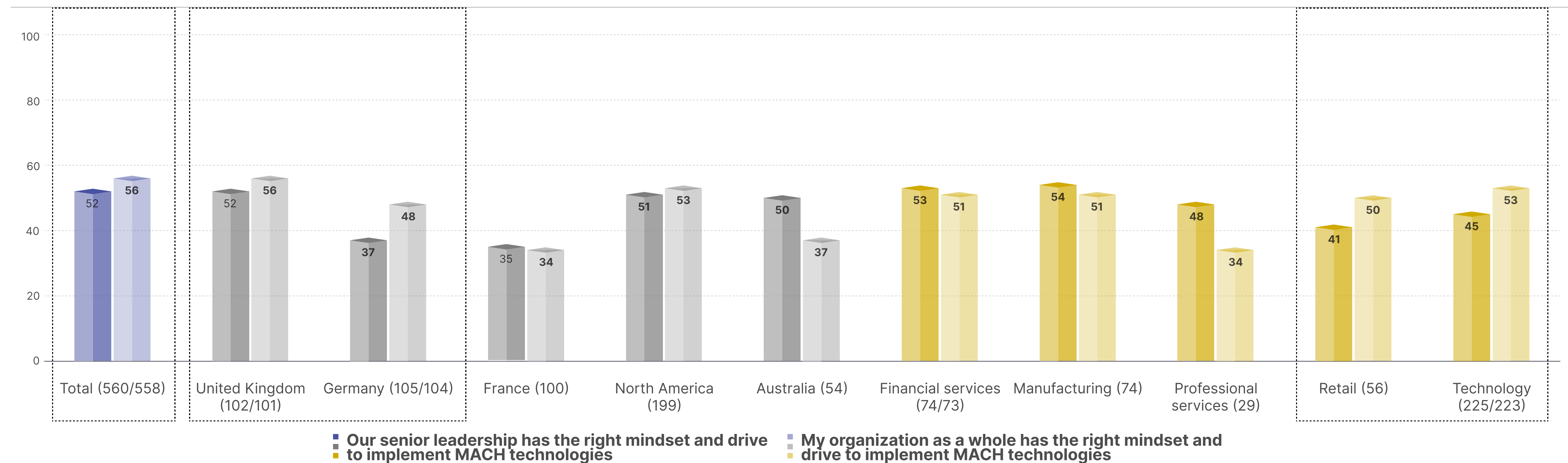
Q26W5. Which of the following best describes how strongly you agree or disagree with the following statements?
Base: Shown in brackets (confident in ability / confident could implement in next quarter) – all valid responses

Mindset is still a potential barrier to MACH implementation.

This reflects the pattern of positivity towards MACH compared to organizational age.

Although nearly nine in ten agree that the right mindset exists in their organization, less than half strongly agree that their leadership and organization have the right mindset and drive to implement MACH.

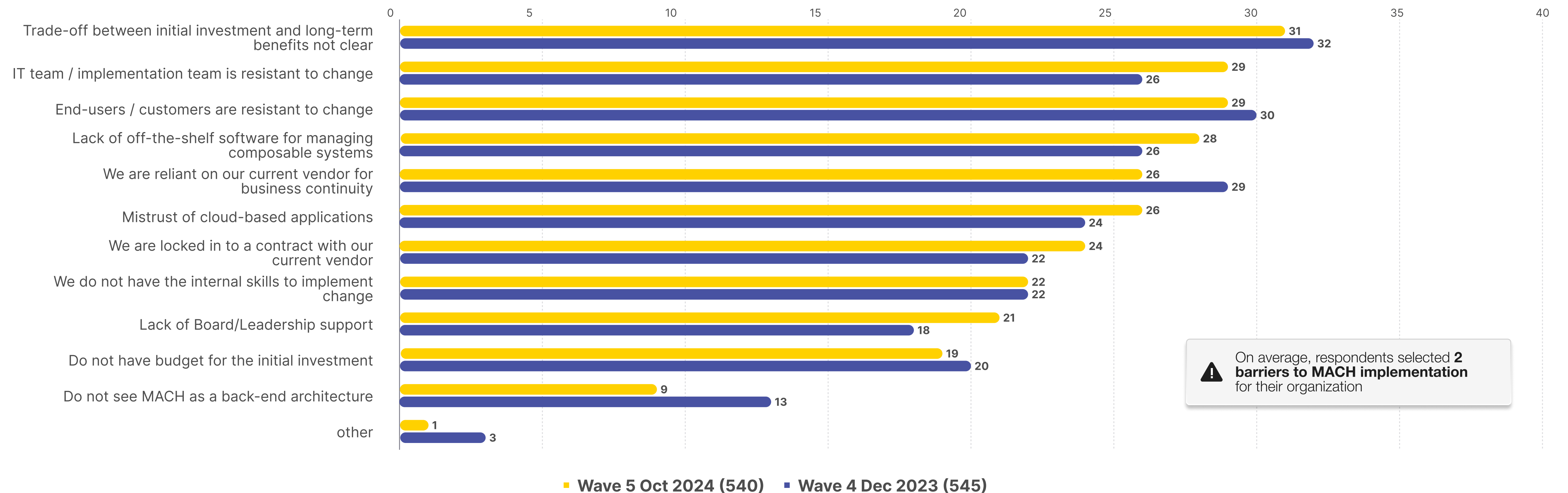
Showing the % that strongly agree with these readiness statements



Q26W5. Which of the following best describes how strongly you agree or disagree with the following statements?
 Base: Shown in brackets (confident in ability / confident could implement in next quarter) – all valid response

Challenges demonstrating ROI and resistance to change are key barriers to MACH implementation.

The barriers remain consistent with the previous survey – though MACH has further improved its positioning as a back-end architecture.



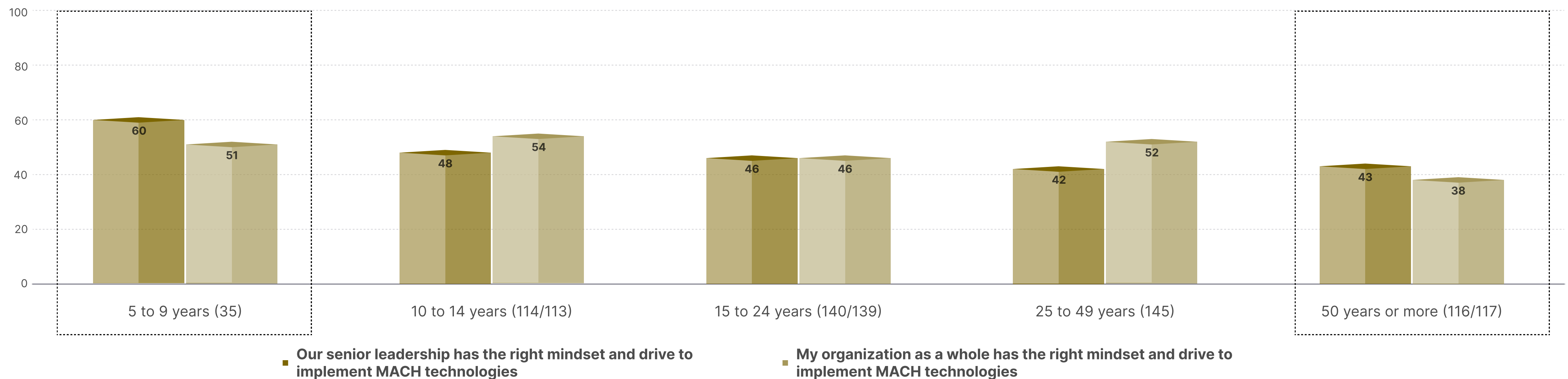
Q26W5. Which of the following best describes how strongly you agree or disagree with the following statements?
Base: Shown in brackets (confident in ability / confident could implement in next quarter) – all valid responses

Broadly, the mindset and drive for MACH is less likely to be present in older organizations.

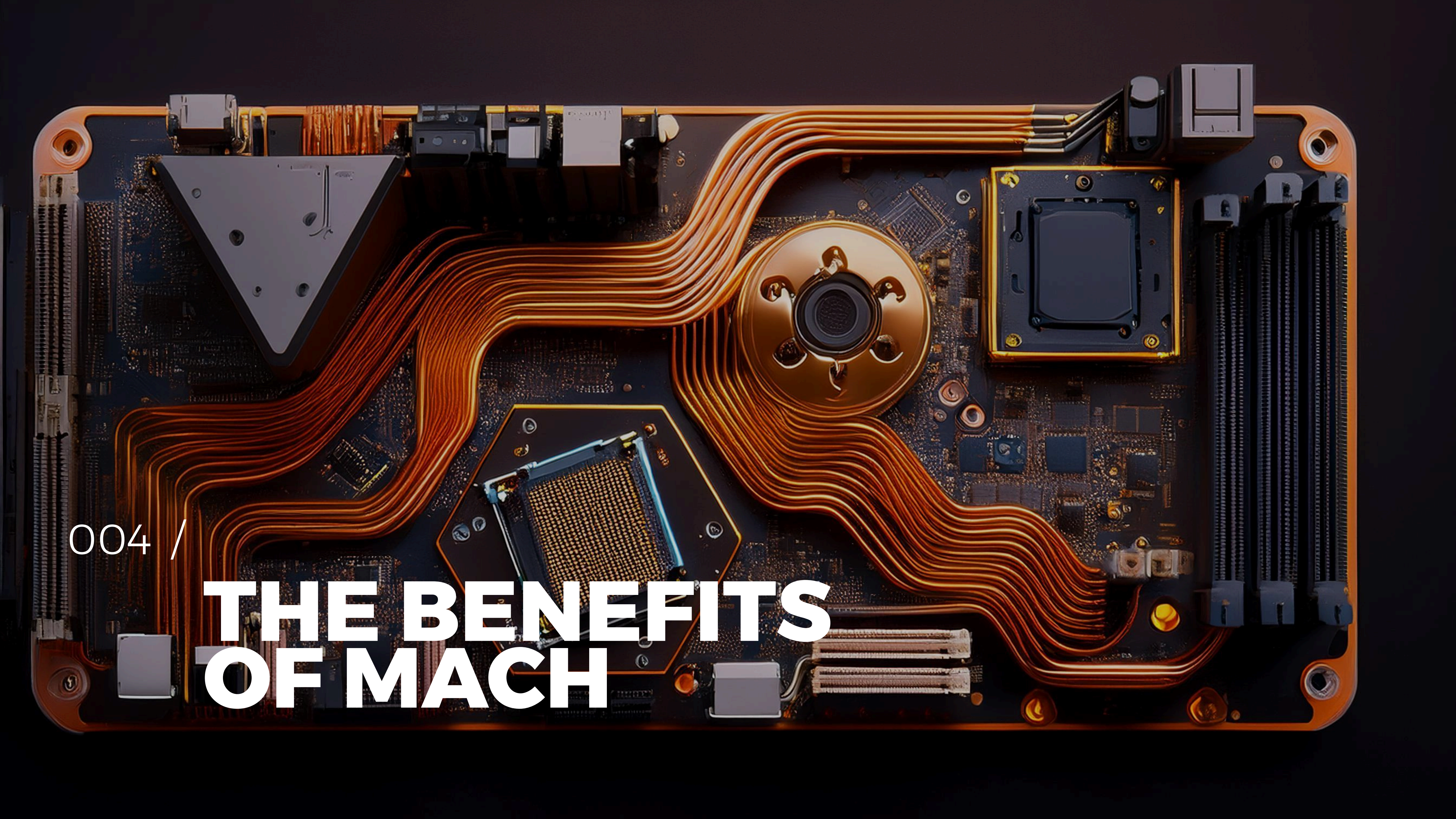
This reflects the link between organization age and positivity towards MACH and MACH readiness.

It is likely that additional challenges, such as legacy systems and structural constraints, impact the overall scoring on 'Mindset and Drive' for older companies. While in turn along with reduced readiness, the mindset of older organizations could be a barrier to MACH implementation.

Showing the % that strongly agree with these readiness statements



Q26W5. Which of the following best describes how strongly you agree or disagree with the following statements?
Base: Shown in brackets (confident in ability / confident could implement in next quarter) – all valid responses

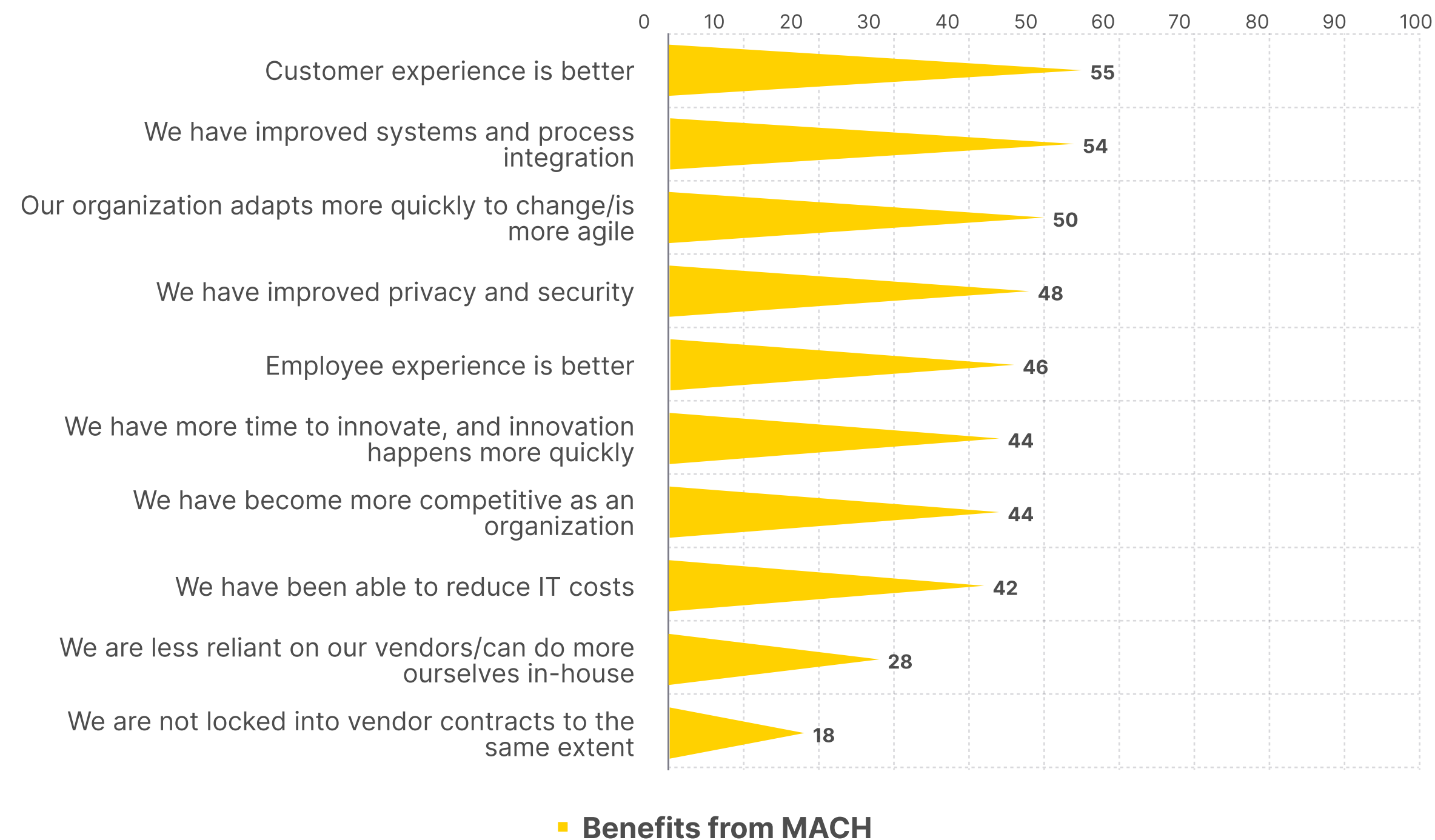


004 /

THE BENEFITS OF MACH

Organizations experience multiple benefits as a result of implementing MACH.

Improved customer experience, improved systems and processes, and greater agility are the top three benefits.



Country/Industry	Where top 3 benefits of MACH differ vs total	
United Kingdom	We have become more competitive as an organization	56%
Germany	We have improved privacy and security	44%
North America	We have improved privacy and security	54%
Retail	We have improved privacy and security	61%
Retail	Employee experience is better	55%

⚠ On average, respondents selected **4 benefits of MACH implementation** for their organization

Q23W5. Which of the following benefits, if any, has your organization experienced as a result of implementing MACH?
 Base: 541 – all valid responses for all respondents whose organization has some MACH in infrastructure

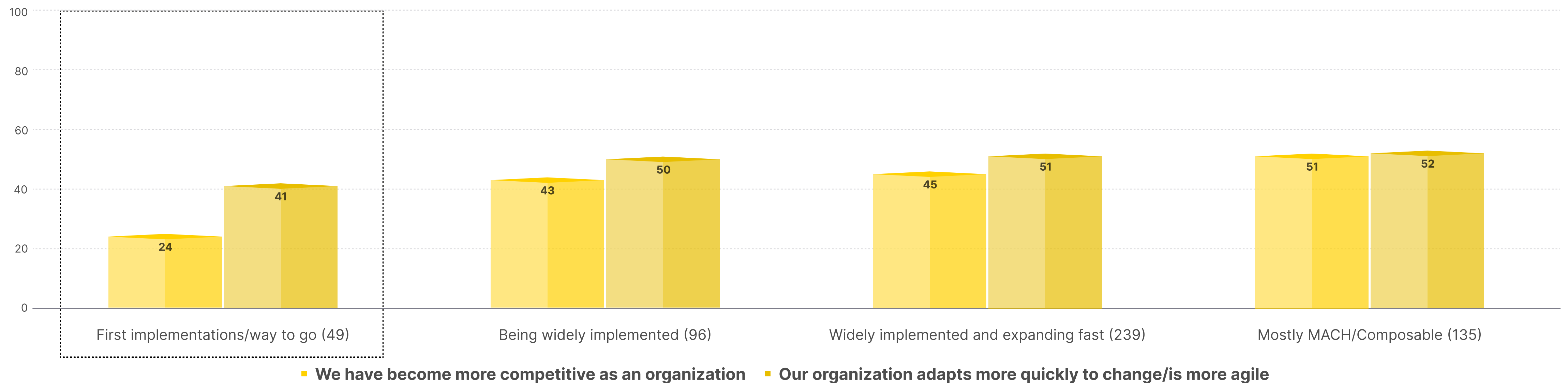
More MACH = more agile and more competitive.

Increased agility and competitiveness are experienced by organizations further along with MACH implementation.

This suggests that not only are the benefits of MACH experienced once it is first implemented, but that wider use of MACH means benefits are experienced to a greater extent.

less mature

more mature



Q23W5. Which of the following benefits, if any, has your organization experienced as a result of implementing MACH?
 Base: shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure

The further organizations are into their MACH journey, the more open to experimentation and innovation they are.

Given the role that MACH plays in innovation (slide 29), it is likely that greater use of MACH enables organizations to be more innovative.

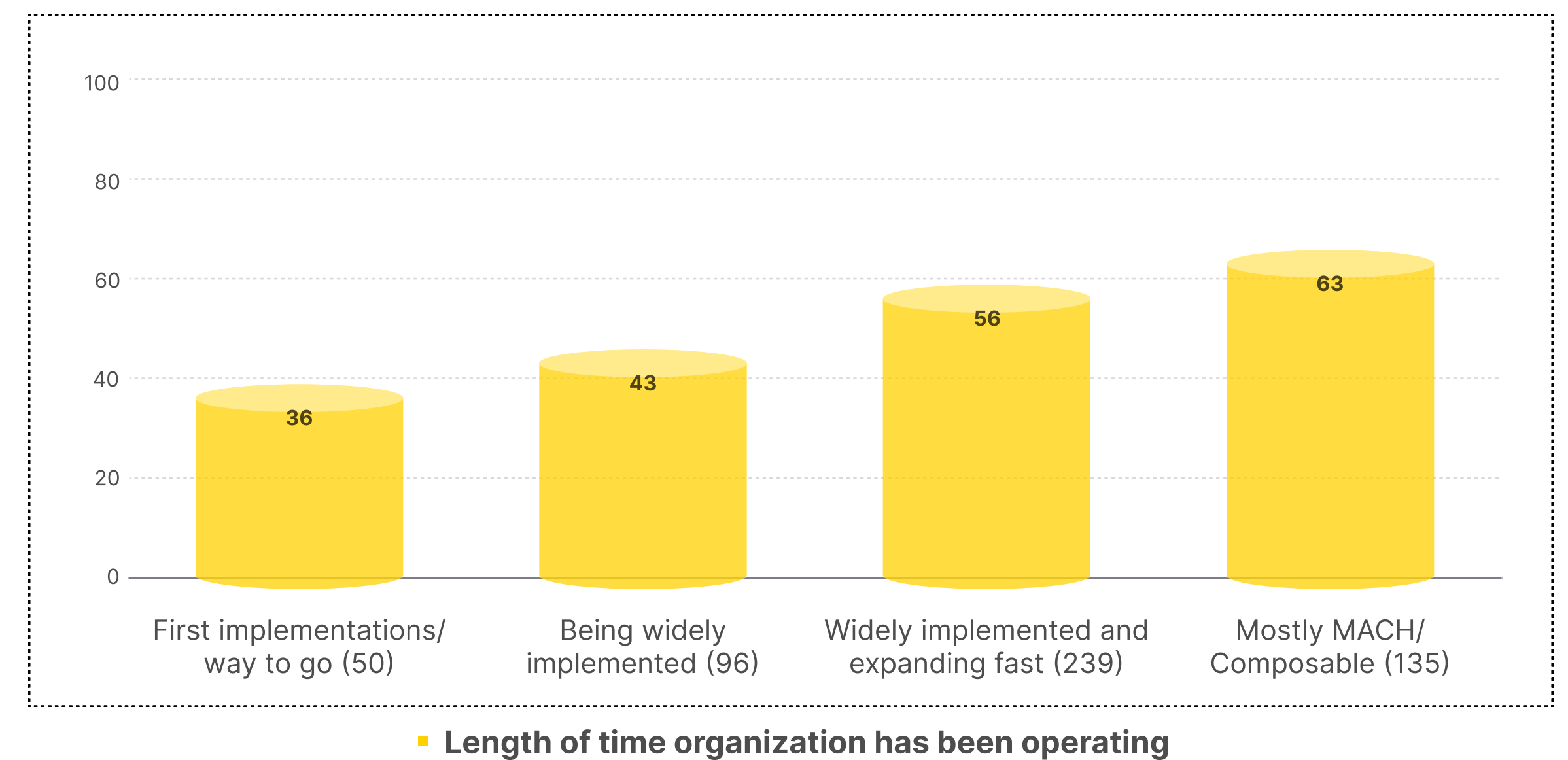
Again, the data here demonstrates that older organizations find it harder to modernize and keep up with innovation.

younger

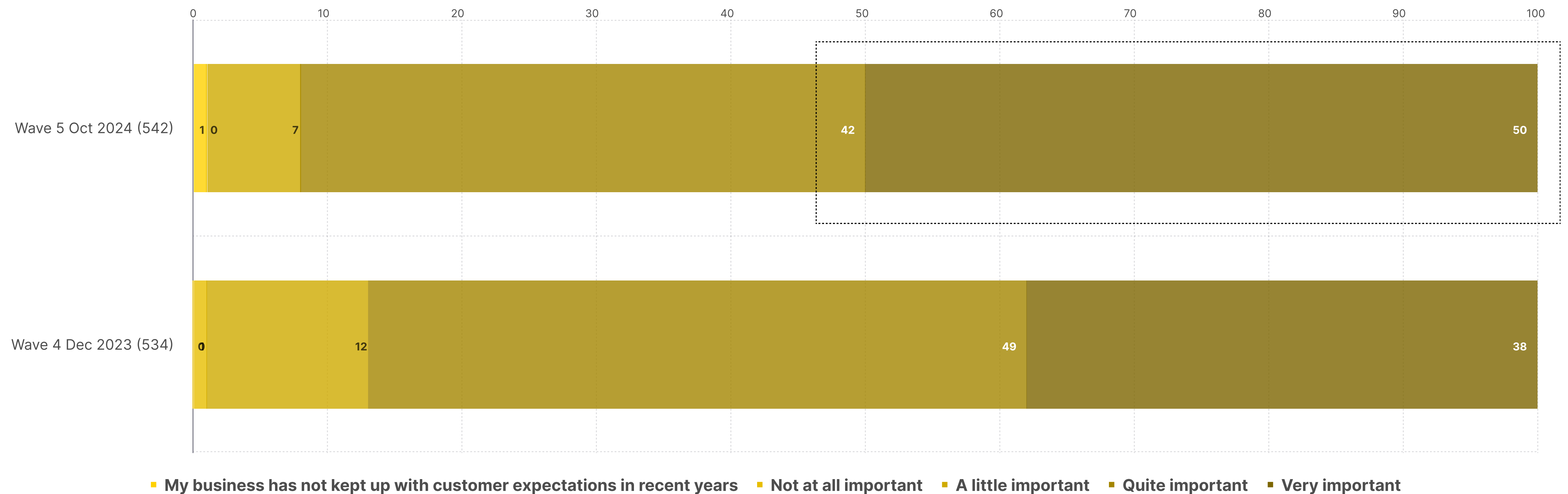
older

less mature

more mature



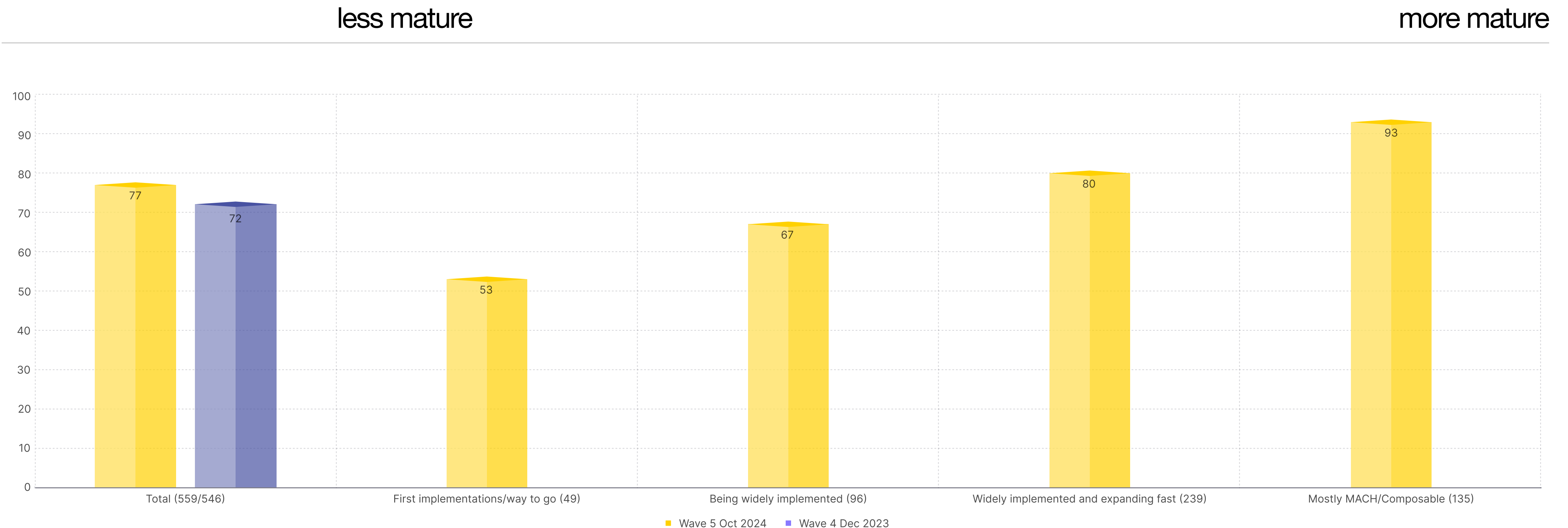
The role and importance of MACH technologies in enabling organizations to meet customer expectations is increasingly recognized.



Q010C. How important do you believe that MACH technologies in your IT infrastructure have been in helping your organization to meet customer expectations in recent years?
Base: shown in brackets – all valid responses

More MACH = more competitive infrastructure

The more mature an organization is in terms of their MACH implementation, the more likely the infrastructure is to be assessed favorably vs competitors.



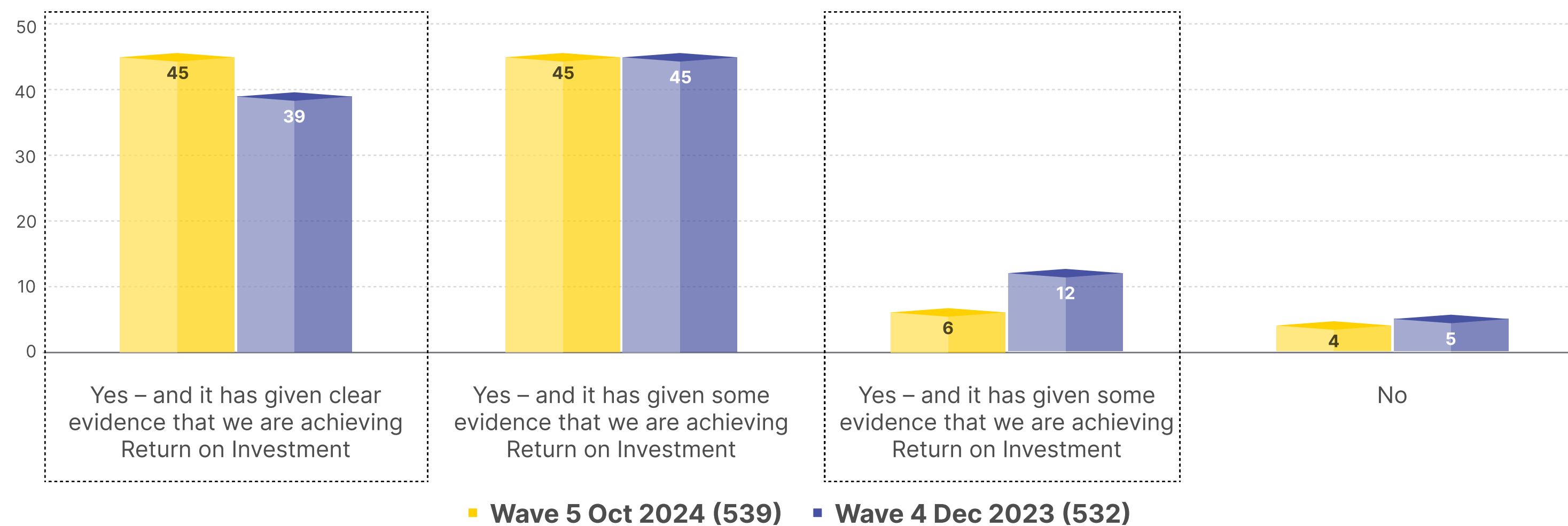
Please note that the question wording changed slightly between Waves 4 & 5 as follows:
 Wave 5 Oct 2024 wording: Q012. How do you think your organization's current infrastructure compares to your competitors?
 Wave 4 Dec 2023 wording: Q012. How do you think your organization's current customer-facing infrastructure compares to your competitors?
 MACH maturity for cross tabulation was not established in Wave 4
 Base: shown in brackets – all valid responses

! Showing the % that say their organization's current infrastructure is significantly/slightly **ahead of the competition**

An increasing number of organizations are achieving return on investment (ROI) on MACH investment.

Nine in ten organizations with at least some MACH infrastructure are achieving ROI on their investment, up 7% vs last year.

It is likely that increased positivity towards MACH (slide 12) is, in part, being driven by a larger proportion of organizations now experiencing a return on their MACH investment – organizations have had the opportunity to experience the benefits of MACH and composable technology.



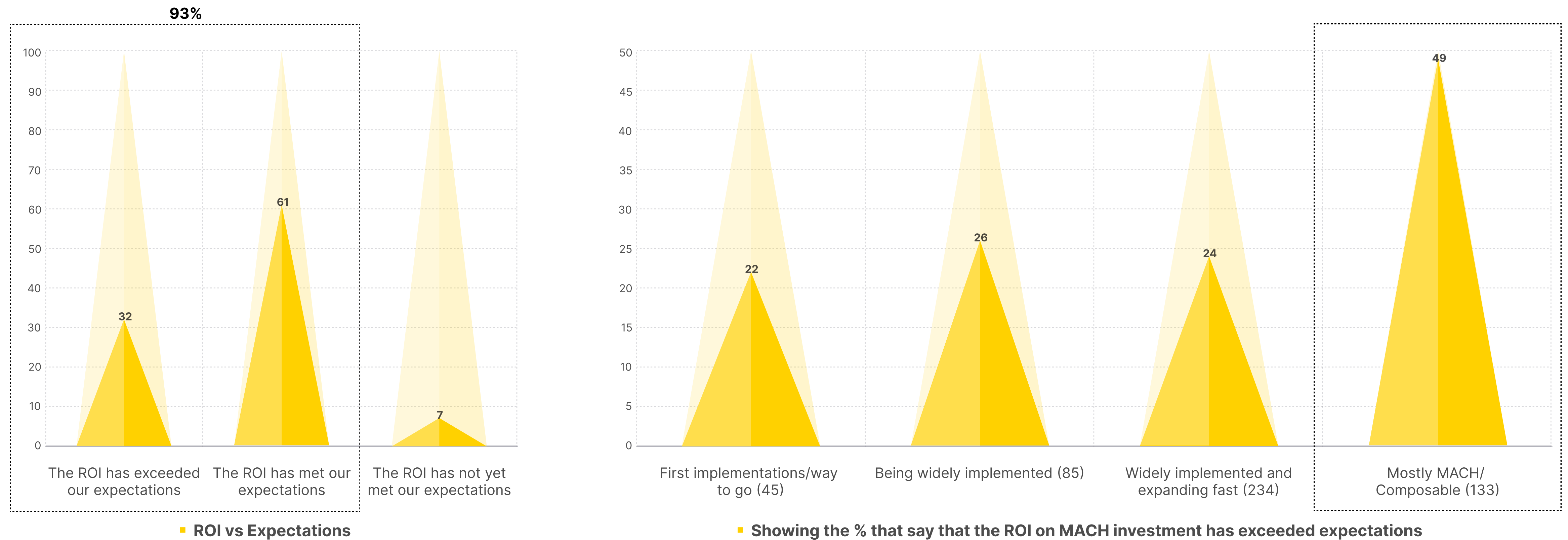
	% measuring ROI	% achieving ROI
Wave 5 Oct 2024	56%	56%
Wave 4 Dec 2023	44%	44%

Q20W5. Which of the following best describes when your organization's journey with MACH and composable architecture began?
 Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure
 “Within the last 6 months” was an answer option but was not selected by anyone and is therefore not shown here

MACH investment is financially worthwhile.

ROI has met or exceeded the expectations of nine in ten (93%) organizations measuring it.

For organizations that have mostly MACH/composable infrastructure and that are measuring ROI, almost half (49%) say that ROI is exceeding expectations, suggesting that a greater implementation of MACH is cost effective.



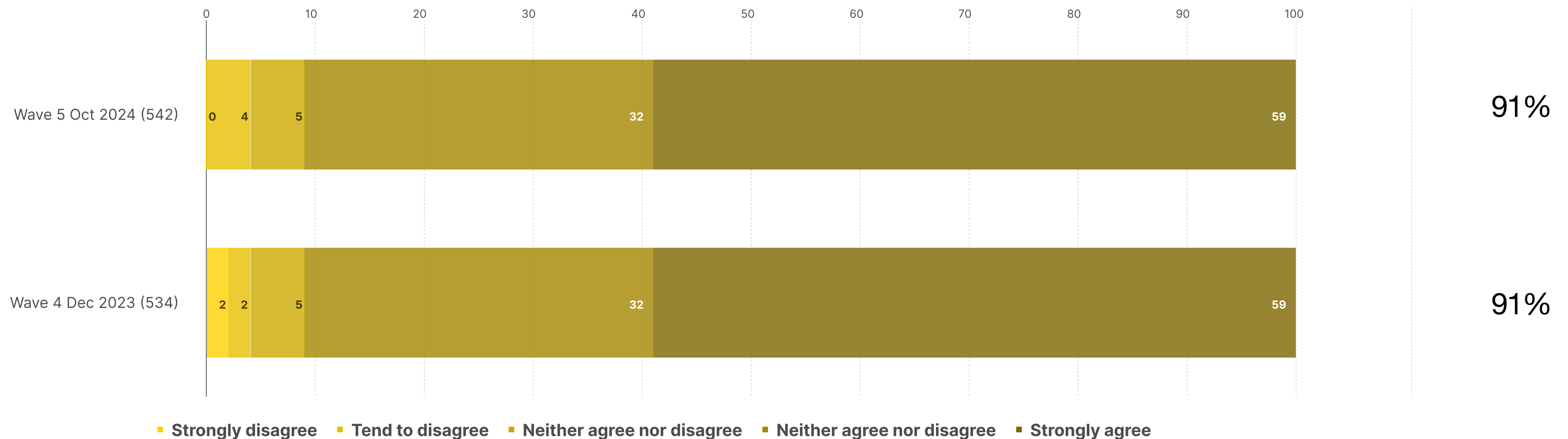
Q24W5. How do you feel about your organization's ROI on MACH compared to expectations?
 Base: 517 for left-hand chart, bases shown in brackets for right-hand chart – all valid responses for all respondents whose organization is measuring ROI on MACH investment

MACH continues to play a key role in the long-term success of organizations.

Opinions remain consistent regarding the important role MACH technologies play in the long-term success of organizations.

Showing % agree/disagree to the statement “MACH technologies will play an important role in ensuring the long-term success of my organization in the next 5 years”.

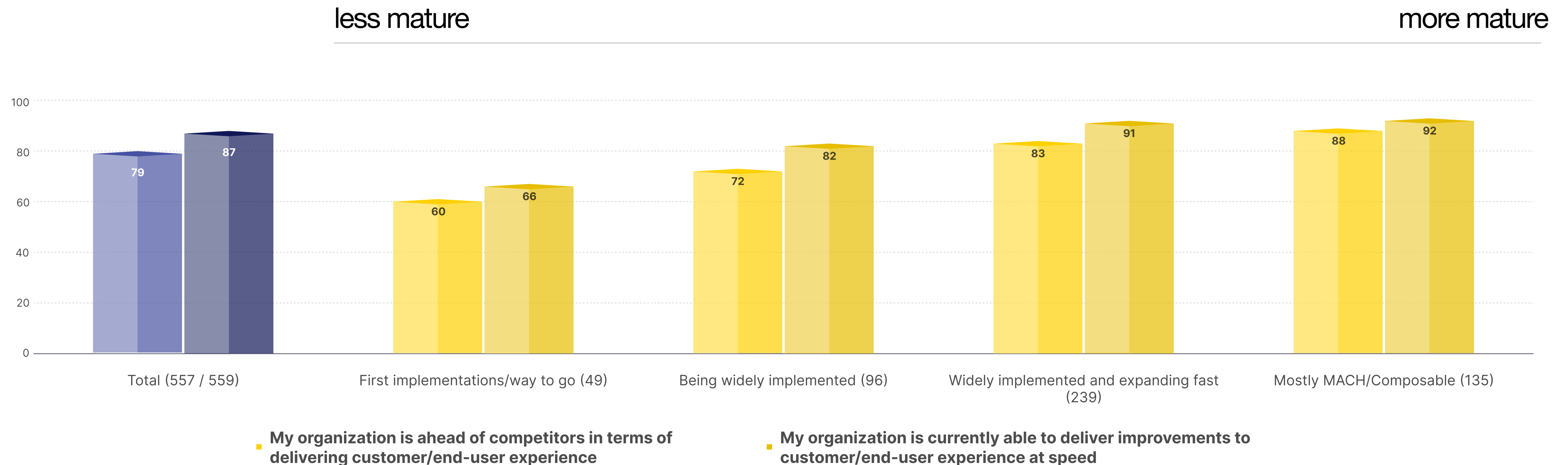
% strongly/
tend to agree



Q04D. How far do you agree or disagree with the following statement?: MACH technologies will play an important role in ensuring the long-term success of my organization in the next 5 years. Base: Shown in brackets – all valid responses

Organizations further along their MACH implementation journey are better able to deliver customer/end-user experience vs competitors.

Composable infrastructure enables organizations to deliver more quickly and accurately for their customers. The greater the extent of MACH technology within an infrastructure, the more an organization can pivot to meet customer demand. MACH and composable infrastructure are therefore key factors for keeping up with and exceeding competitor performance.



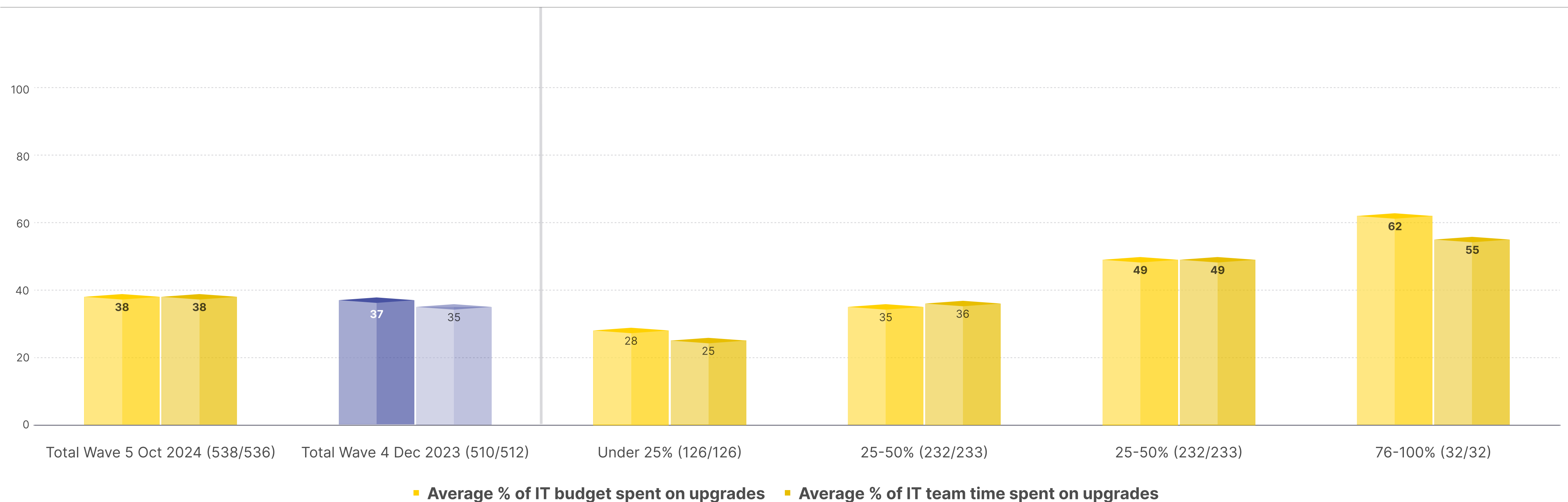
! Showing the % that strongly/tend to agree with these statements

Q08/7&4. To what extent, if at all, do you agree or disagree with the following statements?
Base: shown in brackets – all valid responses

More legacy technology = more time and money spent on upgrades.

The monolithic nature of legacy tech requires larger scale, and therefore, more costly and time consuming fixes.

Organizations' bottom line will benefit from a continued shift towards MACH and composable technology. Those with less legacy tech are likely to be more competitive as they can free up IT budget and time for innovation, and as a result can have greater focus on generating and meeting customer demand.



Q20W5. Which of the following best describes when your organization's journey with MACH and composable architecture began?
 Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure
 “Within the last 6 months” was an answer option but was not selected by anyone and is therefore not shown here

An aerial night view of a city with glowing architectural overlays. The image shows a dense urban landscape with various building shapes and colors. A large, glowing blue triangle is overlaid on a building on the left. A glowing purple hexagon is overlaid on a building in the center. A glowing blue square is overlaid on a building on the right. The city lights are warm and yellow, contrasting with the cool blue and purple of the overlays.

005 /

MACH & MEGA TRENDS

006 /

CONCLUSIONS

Organizations with more composable infrastructure are more likely to be at the forefront of AI technology.

There will be multiple factors contributing to this pattern of data. Companies that are more MACH mature, are likely more advanced in their modernization efforts and have a progressive organizational strategy, hence also making more progress with AI technology.

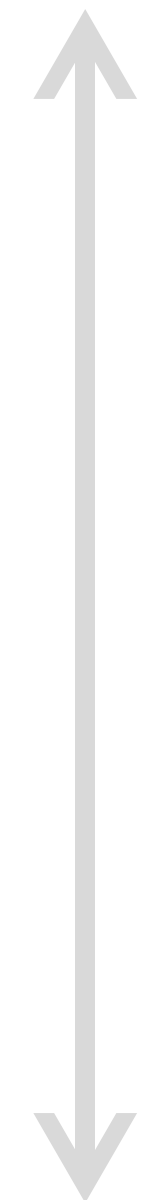
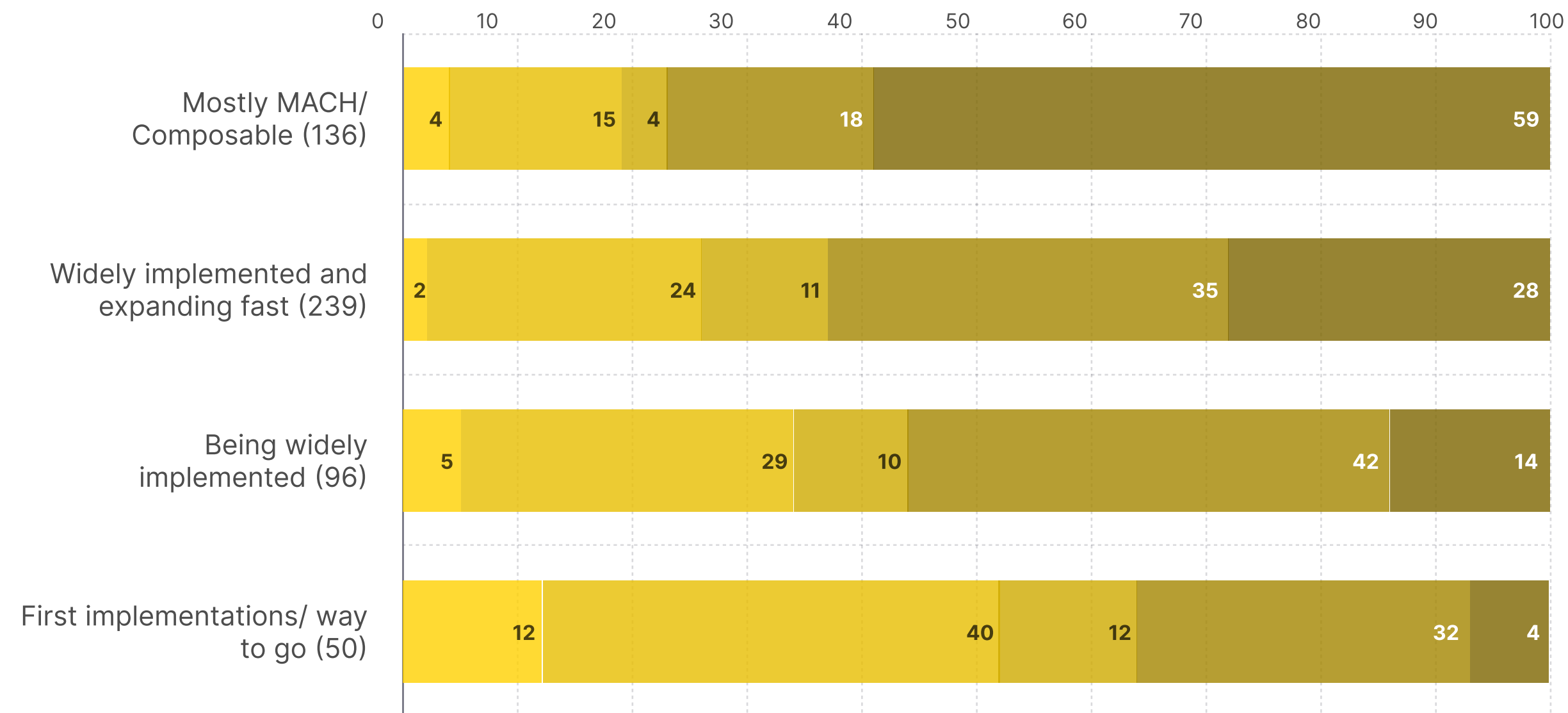
AI Maturity

less mature

more mature

MACH Maturity

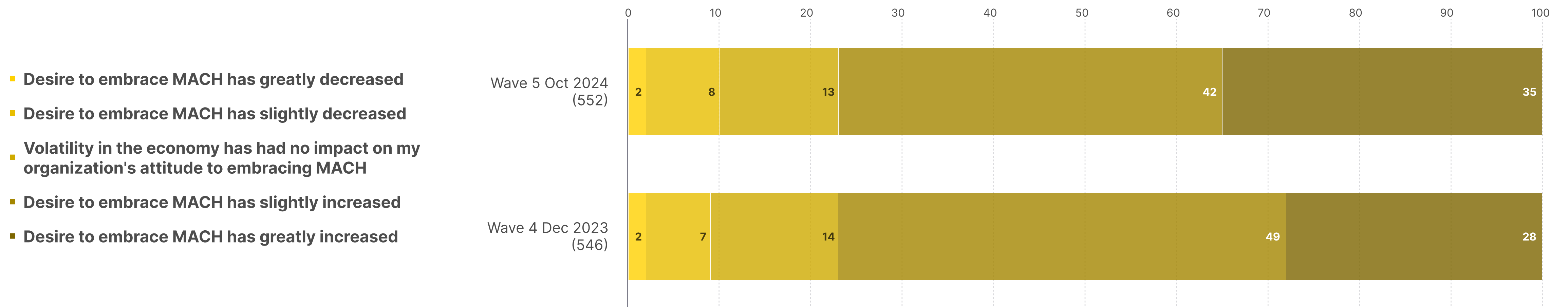
- Our organization does not use AI at all
- We only use AI in basic applications such as Microsoft Copilot and ChatGPT
- AI is used within our technology stack only because our vendor is using it
- We use AI in-house within our technology stack
- Our use of AI in our technology stack is ahead of our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



Q27W5. Which of the following best describes how your organization uses Artificial Intelligence (AI)?
Base: shown in brackets – all valid responses

Economic volatility continues to drive organizations' desire to embrace MACH technologies.

More than a third (35%) of organizations desire to embrace MACH has greatly increased, up 7% from last year.



Q29W5. You said that your organization's desire to embrace MACH has greatly/slightly increased due to economic volatility. Please could you explain your answer in as much detail as possible? Base: 424 – respondents whose organization's desire to embrace MACH has increased due to economic volatility
 Responses given by 5% or more of respondents shown in the table
 Note that comments have been allocated to more than one theme where applicable

The agility and economic resilience enabled by MACH technologies are key reasons cited for organizations' greater desire to embrace MACH in the face of economic volatility.

Theme	Prevalance
Agility / flexibility / adaptability	26%
Cost benefit / reduced costs	23%
Improve competitiveness / keep up with competitors	12%
Greater / faster innovation	9%
Better CX / customer satisfaction / better meet customer needs	9%
Scalability	8%
Faster to respond / quicker to market	6%
Stability / resilience	6%
Benefits of MACH generally	6%

"To enhance flexibility, scalability, and resilience in response to economic uncertainty"

CTO, UK

Our desire for MACH architecture has increased due to its agility, cost efficiency, scalability, improved customer experience, and ability to future-proof our technology"

CEO, USA

"In an ever-changing economy my organisation has embraced MACH in order to stay competitive"

Digital Lead, Australia

"In uncertain economic conditions, the ability to rapidly adapt to market changes is critical. Traditional, monolithic software systems are often slow to evolve and require significant time and resources for updates"

CTO, Australia

"The desire has increased because MACH saves us money on licenses and suppliers. In addition, we are more and more autonomous"

Electrical Maintenance Manager, France

Q29W5. You said that your organization's desire to embrace MACH has greatly/slightly increased due to economic volatility. Please could you explain your answer in as much detail as possible? Base: 424 – respondents whose organization's desire to embrace MACH has increased due to economic volatility

Responses given by 5% or more of respondents shown in the table

Note that comments have been allocated to more than one theme where applicable

For the small proportion of organizations that report a decrease in desire to embrace MACH citing economic volatility, the initial investment is the main reason.

Theme	Prevalance
No budget / too expensive	29%

“Due to budget constraints lots of MACH projects were put on hold”

IT Director, Canada

“We just currently have other priorities centring around staying afloat rather than expanding”

Computer programmer, UK

“We just currently have other priorities centring around staying afloat rather than expanding”

Computer programmer, UK

“The upfront costs and initial investment is hard to justify to leadership when the ROI is difficult to depict accurately”

Department Head of Software, USA

“MACH architecture is a good idea, but for now we need to make sure that our core business is not affected and scale back our investments in this area”

Customer Experience Strategist, Germany

“The uncertainty has led to a strain on budgets and the MACH transition is not the most priority subject”

AI Stream Leader, France

Q29W5. You said that your organization's desire to embrace MACH has greatly/slightly decreased due to economic volatility. Please could you explain your answer in as much detail as possible? Base: 55 – respondents whose organization's desire to embrace MACH has decreased due to economic volatility
Responses given by 5% or more of respondents shown in the table
Note that comments have been allocated to more than one theme where applicable

Conclusions

MACH adoption trends

- Organizations continue to embrace MACH technologies and adoption is on the rise.
- Organizations further behind with MACH adoption are spending a greater proportion of their IT budget on MACH, and MACH implementation in order to catch up.
- There are a multitude of drivers behind MACH adoption: improving customer experience, greater agility, faster innovation, and improved privacy and security are bigger drivers now than they were last year.

MACH readiness and mindset

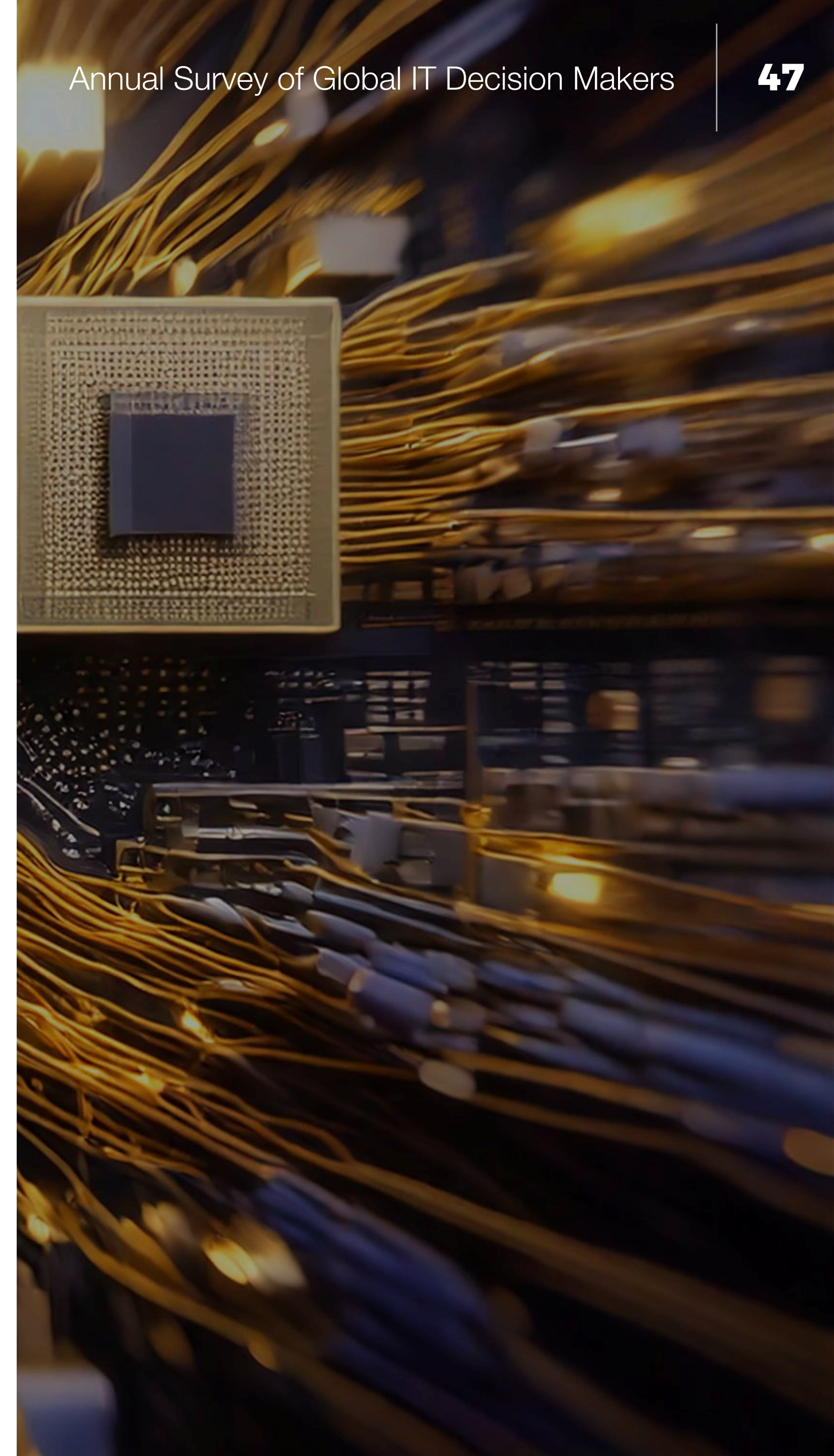
- Organizations generally feel that they have the right mindset, skills, and resources to implement MACH.
- Organizations and leadership mindset is still a potential barrier to MACH implementation in some organizations.
- The right mindset, confidence, and drive for MACH implementation is most lacking in older organizations.
- Perceived challenges demonstrating ROI and resistance to change are key barriers to MACH implementation.



Conclusions

The benefits of MACH

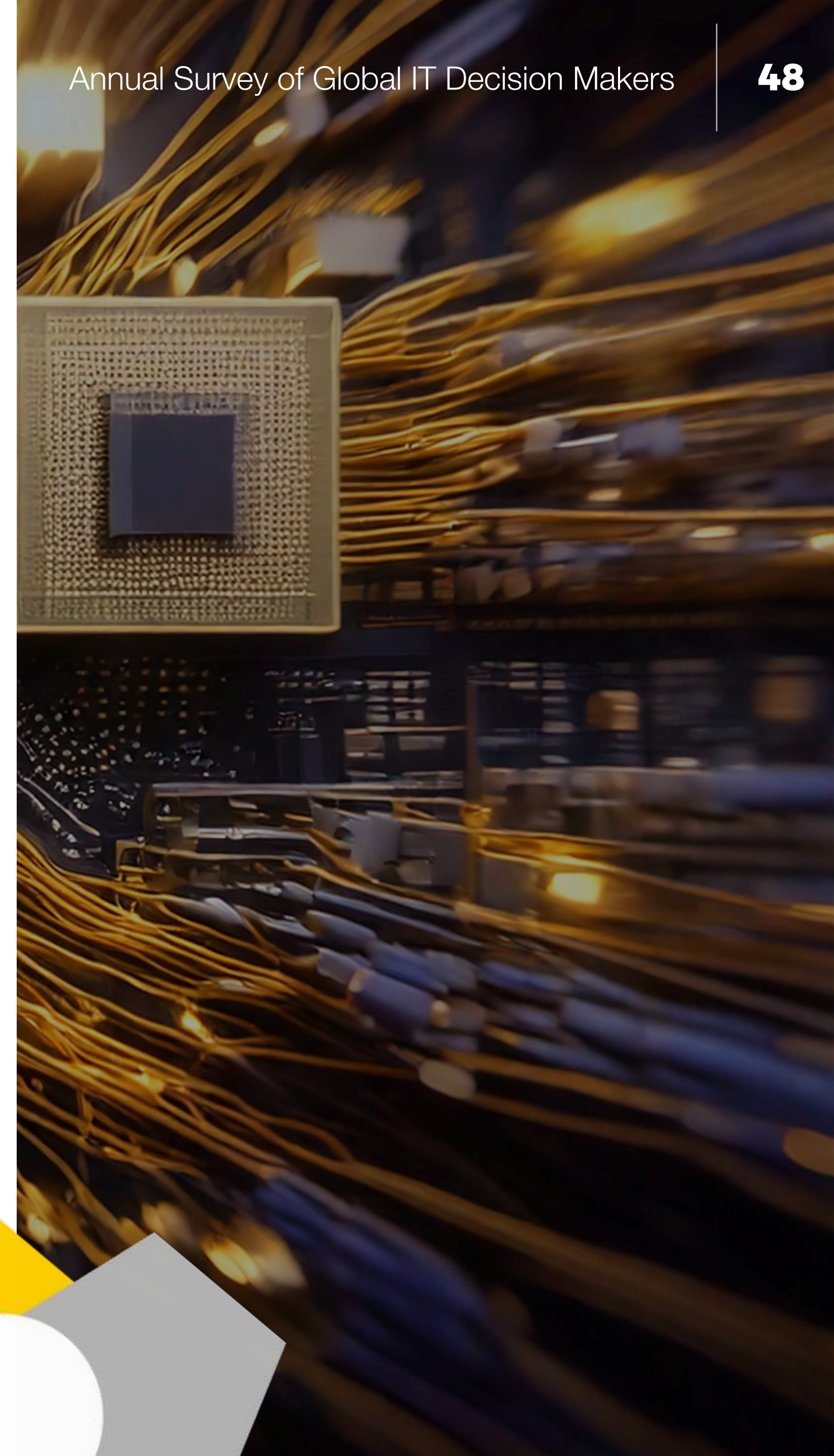
- Improved customer experience, improved systems and processes, and greater agility top the long list of many benefits experienced by organizations as a result of implementing MACH.
- Those further along with their MACH implementation experience greater agility, and are more competitive than organizations newer to MACH adoption.
- Most agree that innovation is essential in order to remain competitive, and MACH plays a key role in an organization's ability to innovate.
- MACH improves organizations' ability to meet customer expectations.
 - Organizations with greater MACH maturity feel they are better able to deliver customer experience vs those that are less MACH-mature.
- The further along an organization is on their MACH journey, the more likely their infrastructure is to be considered competitive.
- More organizations are achieving ROI on their MACH investment.
 - ROI has exceeded the expectations of a third of organizations measuring ROI.
- A greater proportion of legacy technology equates to more time and money spent on upgrades.
 - Organizations intending to move further towards a fully composable infrastructure will ultimately release time and budget for other projects.
- MACH plays a key role in the long-term success of organizations.



Conclusions

MACH and mega trends

- There is a correlation between MACH adoption and AI adoption; organizations more mature in MACH are also more ahead of the AI adoption curve.
- Although multiple factors will contribute, the correlation is likely due to overall more advanced modernization efforts, and a progressive organizational strategy.
- The greater agility and economic resilience enabled by MACH are the key drivers behind the desire to embrace MACH in the face of economic volatility.

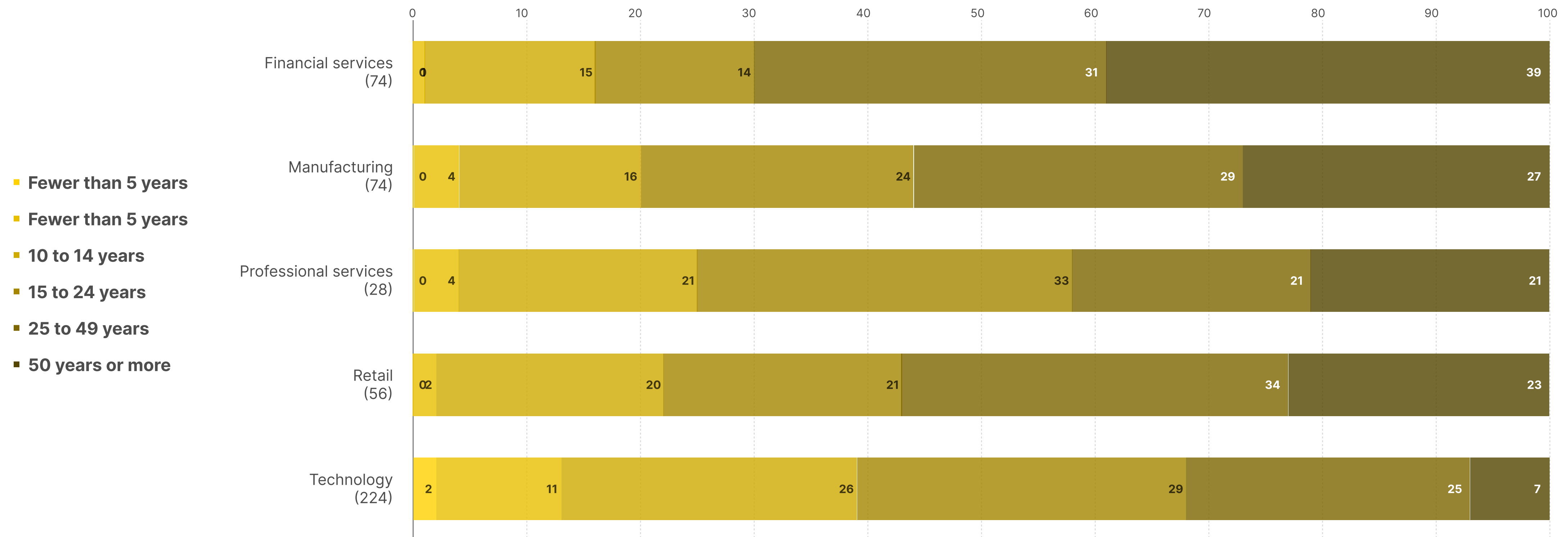


The background is a complex, glowing digital landscape. A central hexagonal shape is filled with a bright, pulsating light, surrounded by concentric rings of light. This central element is connected to a network of glowing lines and various geometric shapes, including triangles, squares, and hexagons, all rendered in shades of blue, purple, and orange. The overall effect is one of high-tech, futuristic energy.

007 /

APPENDIX

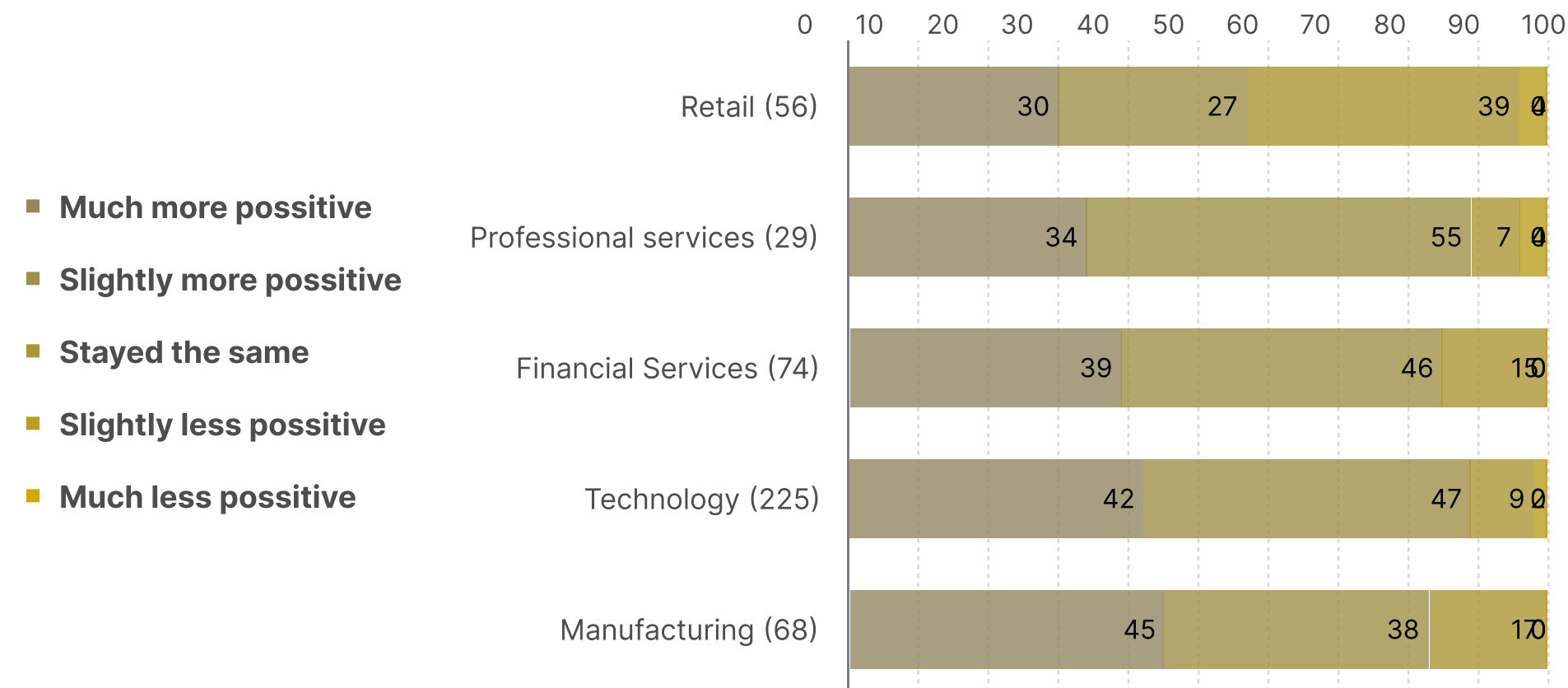
Broadly, organizations in the technology industry are younger than those in other industries.



C02. How long has your organization been operating?

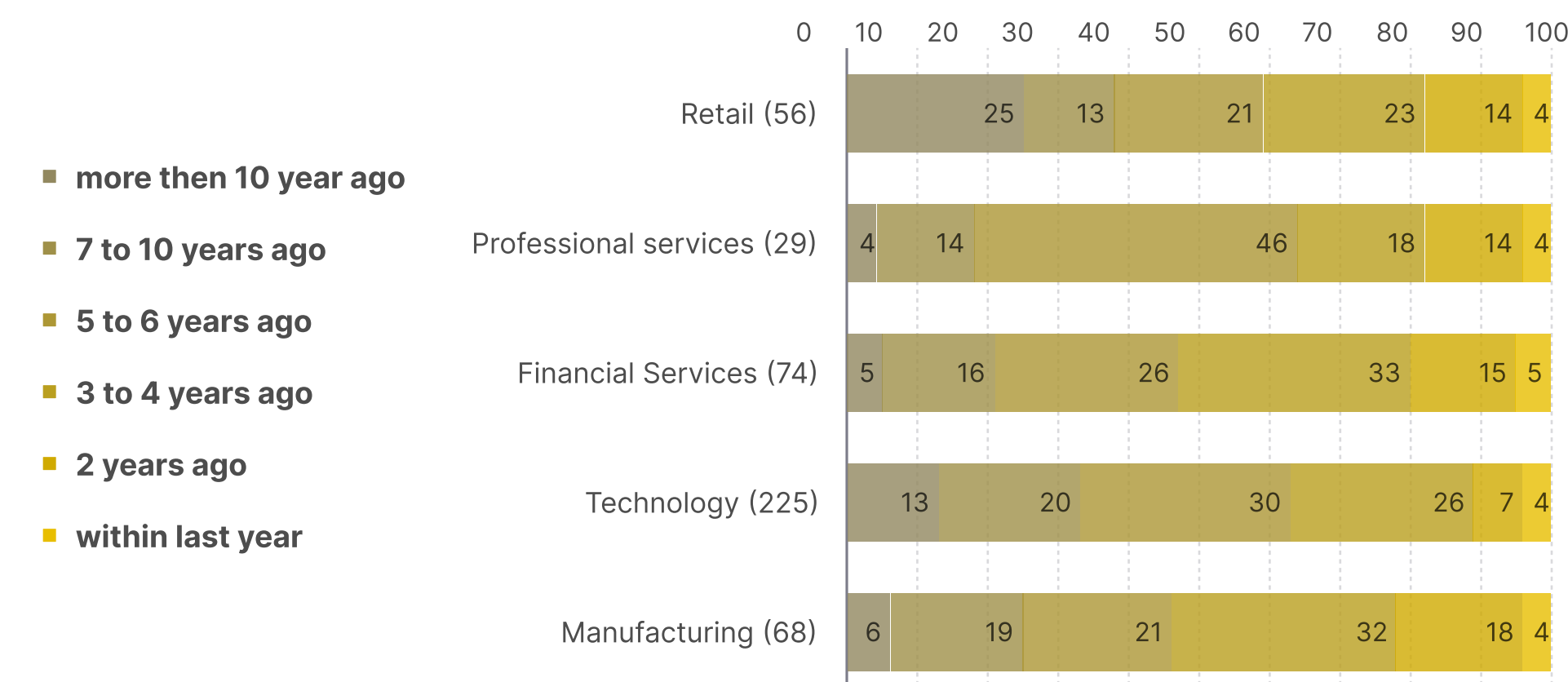
Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure

Although it appears that retail organizations have become less positive towards MACH vs other industries, it is likely that retail organizations were just ahead of the curve



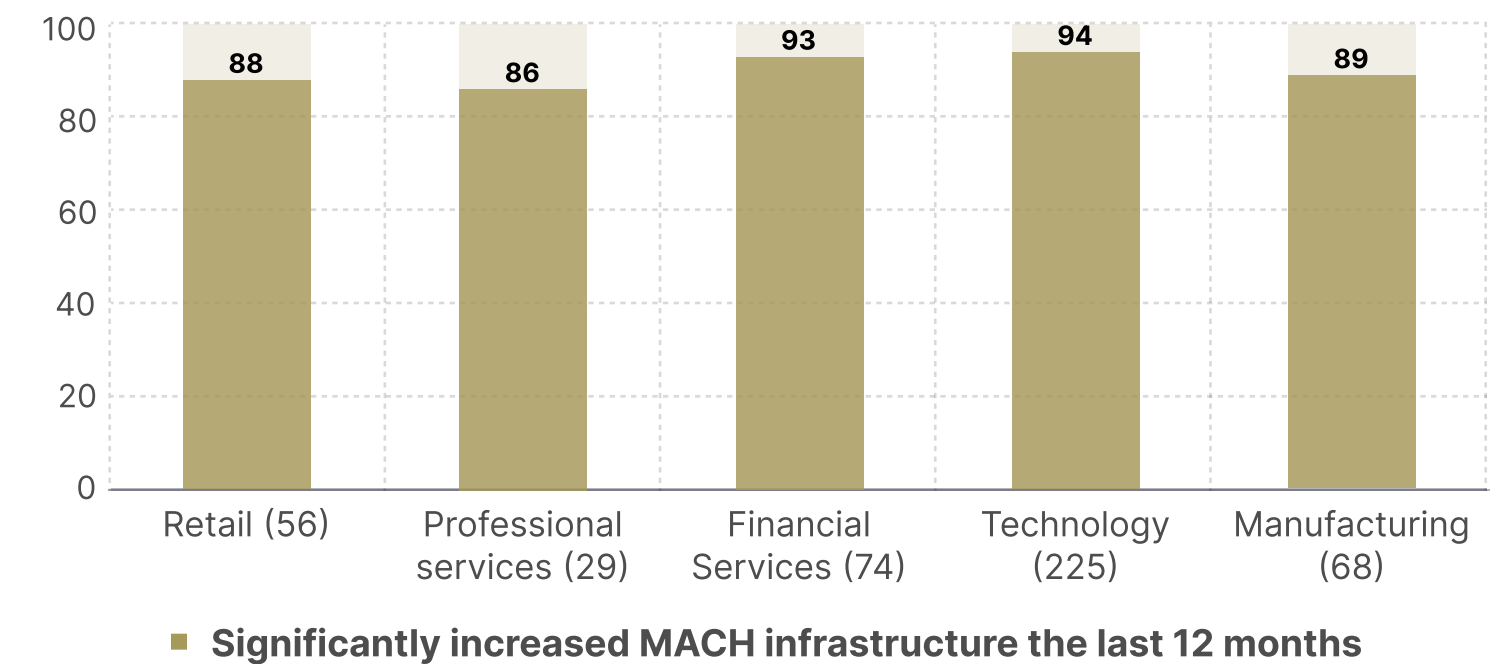
Retail organizations appear less positive towards MACH over the last year... but for 39% their sentiment remained the same

journey started longer ago journey started more recently



Their MACH journey started longer ago – they are twice as likely to have started thinking about composable a decade ago compared to their closest peers

MACH adoption rates for retail are in line with other industries – they're still positive about MACH

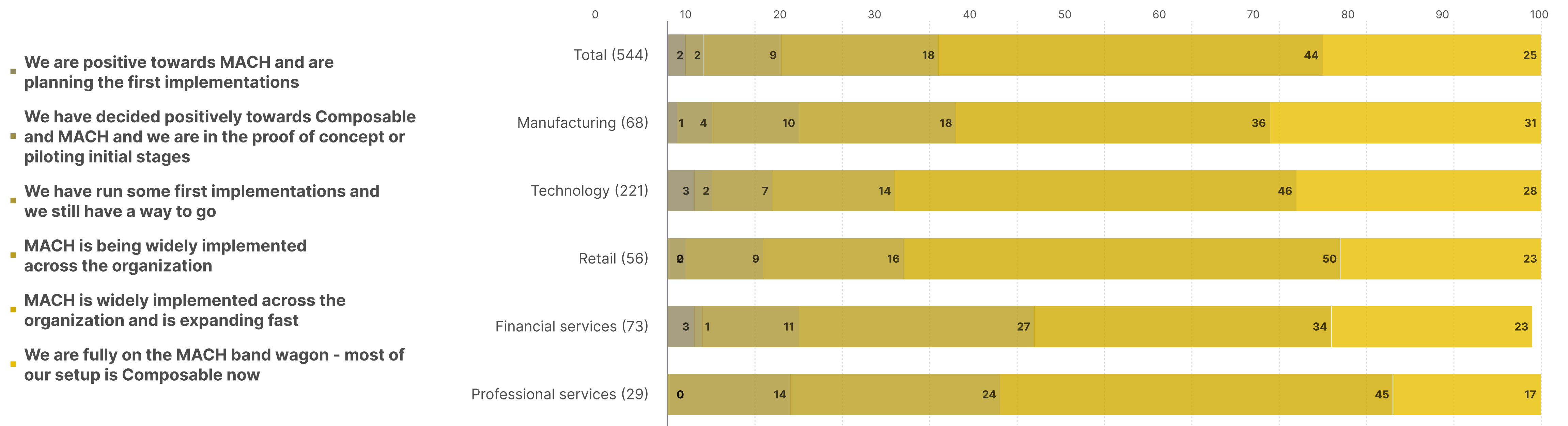


Q25W5. Thinking about the past 12 months, which of the following best describes how, if at all, your organization's attitude towards MACH and Composable has changed?
 Q20W5. Which of the following best describes when your organization's journey with MACH and composable architecture began?
 Q02ANW5. How has the percentage of your organization's infrastructure which is MACH changed in the past 12 months?
 Base: Shown in brackets – Q25W5 and Q02ANW5 all valid responses; Q20W5 all valid responses for all respondents whose organization has some MACH in infrastructure

Despite the earlier start on its MACH journey by the retail industry, both technology and manufacturing industries have overtaken in terms of progress made.

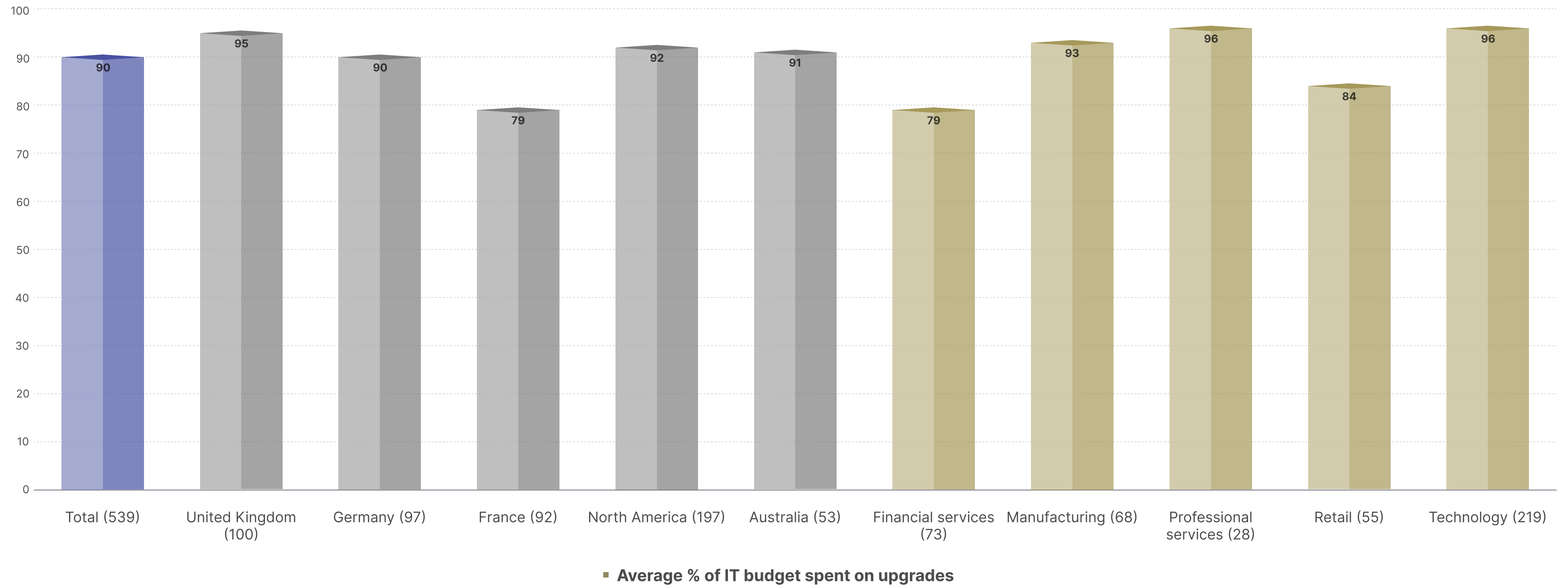
less mature

more mature



Q21W5. Which of the following statements best describes where you feel that your organization is on their MACH journey?
 Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure

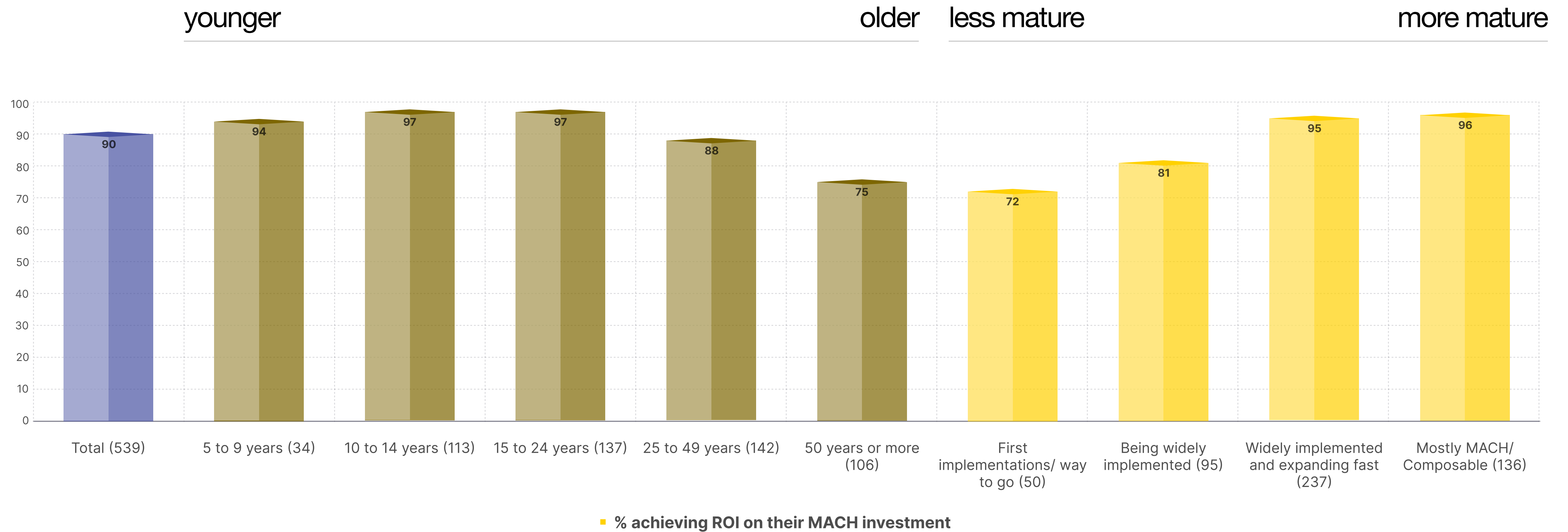
Organizations in the UK, and the professional services, and technology industries, are most likely to be achieving ROI. Those in France, and the financial service industry are least likely to have achieved ROI.



Q017A. Is your organization measuring the Return on Investment (ROI) that it is getting from transitioning to a MACH infrastructure?
Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure

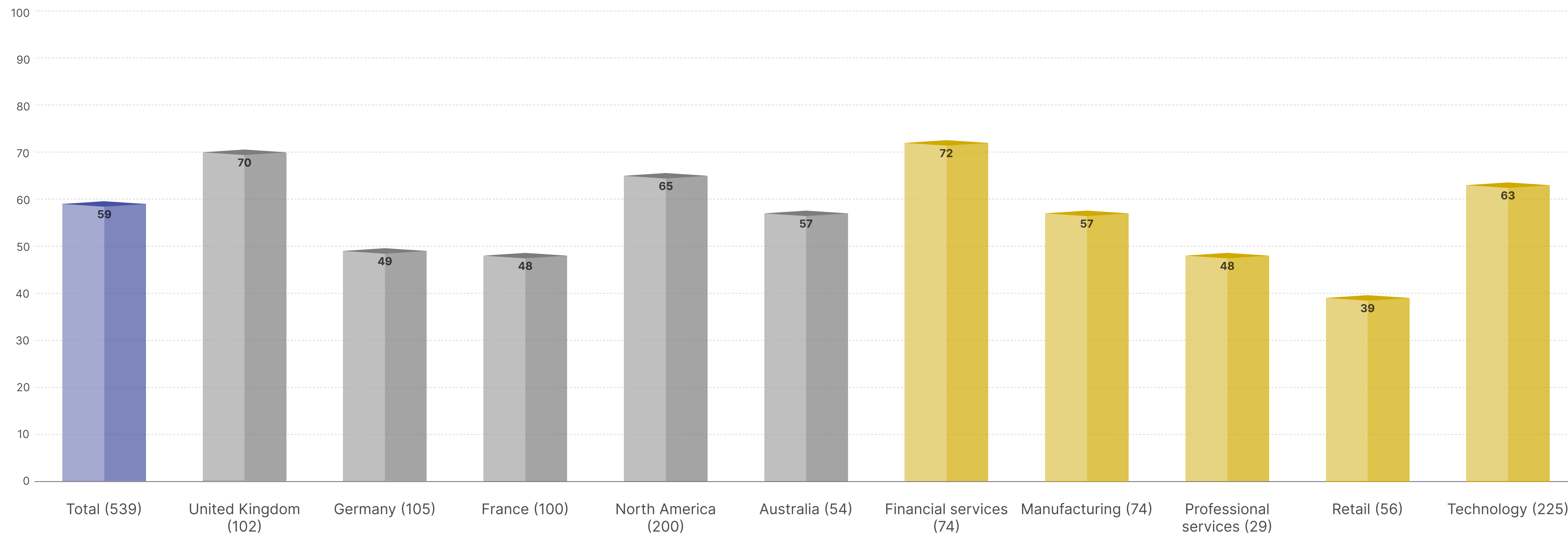
Older organizations and those further behind with MACH implementation are less likely to be achieving ROI on their MACH investment.

These organizations have had less time and opportunity to experience the benefits and ROI on MACH implementation.



Q017A. Is your organization measuring the Return on Investment (ROI) that it is getting from transitioning to a MACH infrastructure?
Base: Shown in brackets – all valid responses for all respondents whose organization has some MACH in infrastructure

MACH technologies are seen as most important to the long-term success of UK and North American organizations, and to organizations in the financial services and technology sectors.

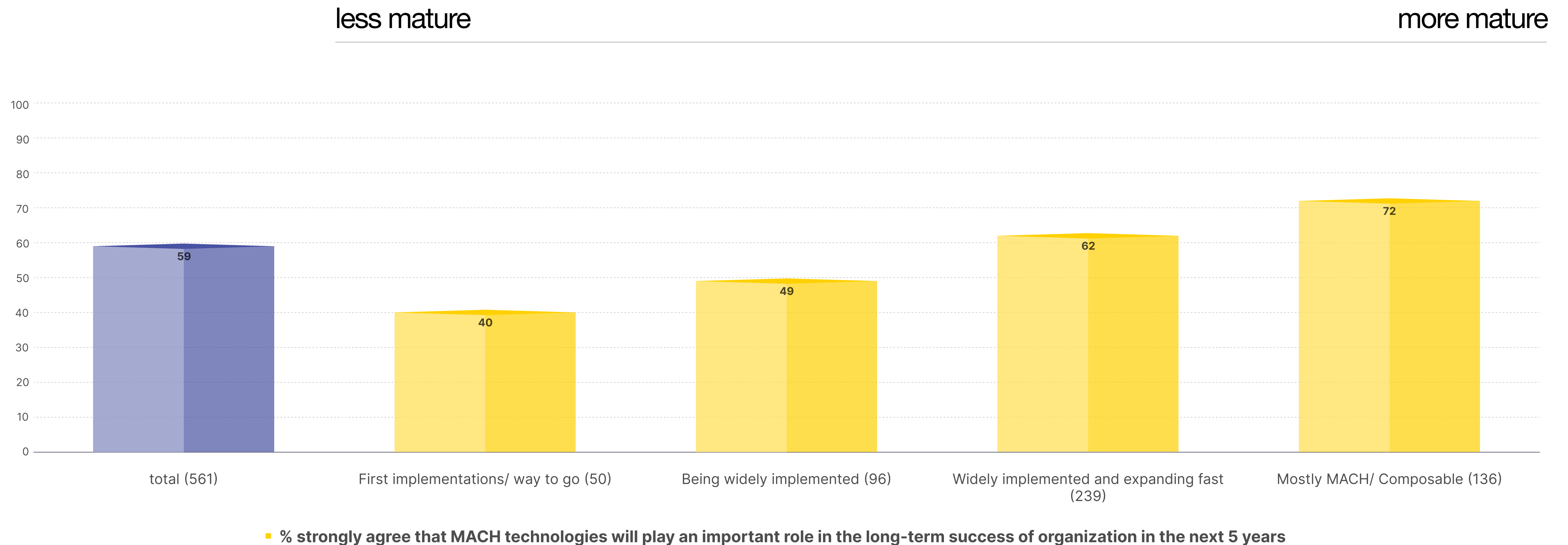


■ % strongly agree that MACH technologies will play an important role in the long-term success of my organization in the next 5 years

Q04D. How far do you agree or disagree with the following statement?: MACH technologies will play an important role in ensuring the long-term success of my organization in the next 5 years. Base: Shown in brackets – all valid responses

Older organizations and those further behind with MACH implementation are less likely to be achieving ROI on their MACH investment.

These organizations have had less time and opportunity to experience the benefits and ROI on MACH implementation.



aQ04D. How far do you agree or disagree with the following statement?: MACH technologies will play an important role in ensuring the long-term success of my organization in the next 5 years. Base: Shown in brackets – all valid responses

Older organizations are less likely to be at the forefront of AI compared to their youngest counterparts.

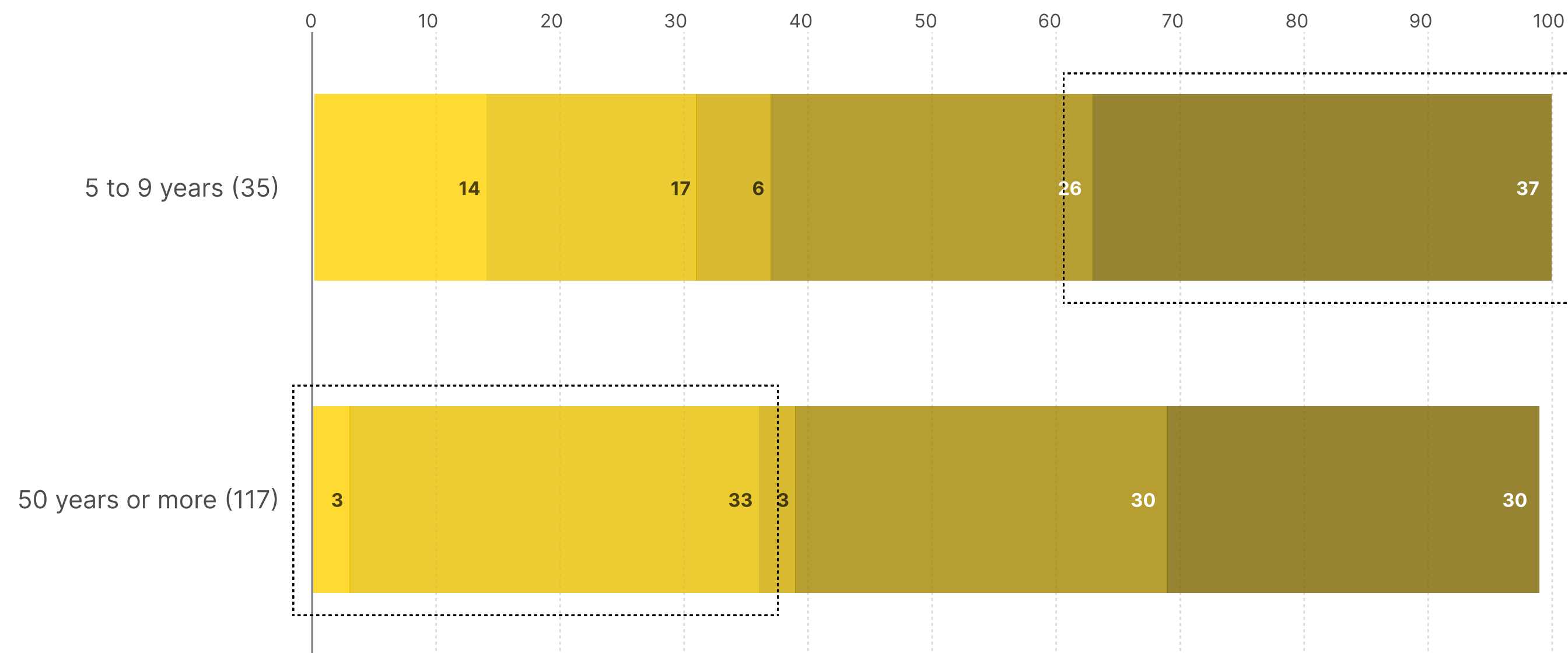
AI Maturity

less mature

more mature

Length of time operating

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



Q27W5. Which of the following best describes how your organization uses Artificial Intelligence (AI)?
 Base: shown in brackets – all valid responses

Organizations with more composable infrastructure are more likely to be more open to AI.

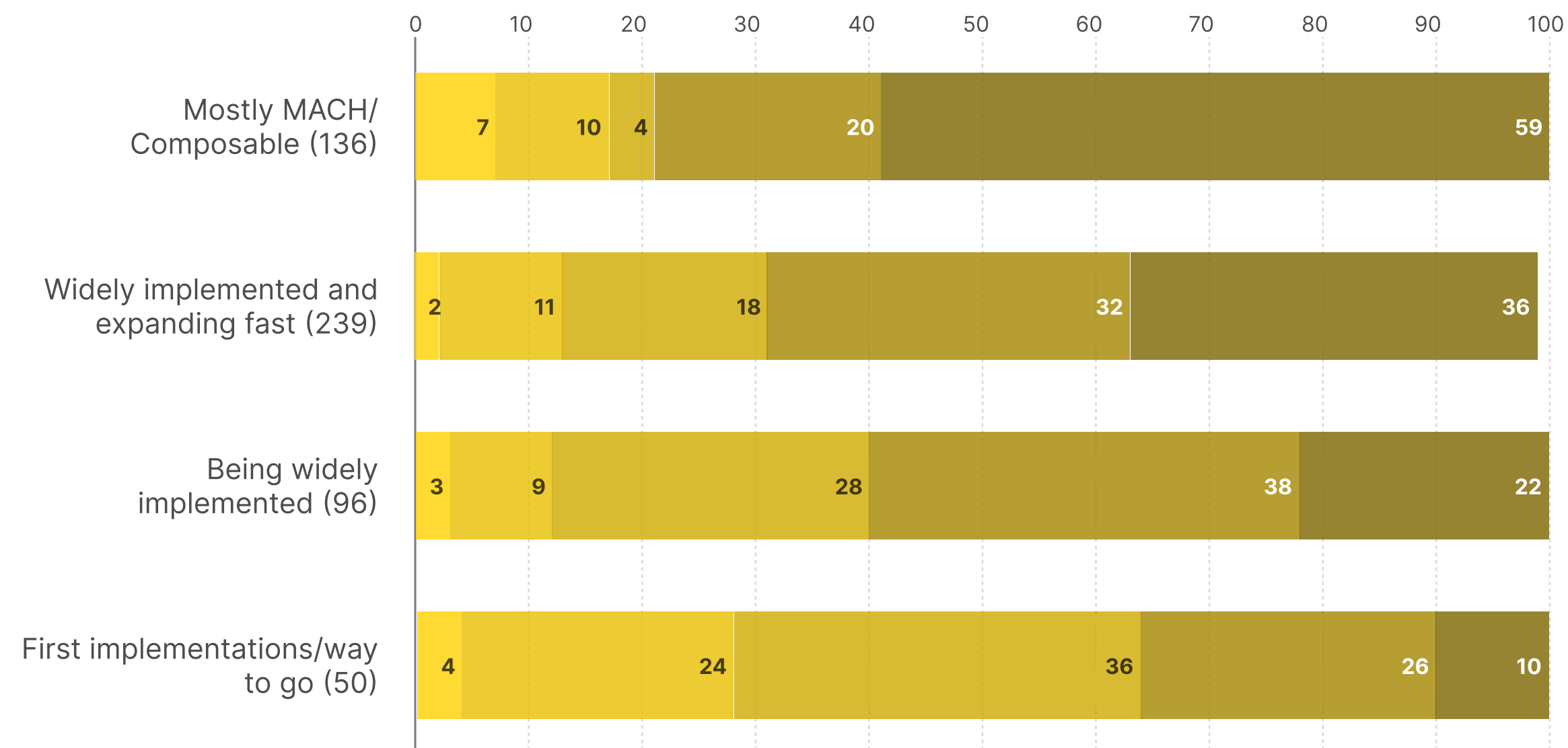
Attitude to ai

less open

more open

MACH Maturity

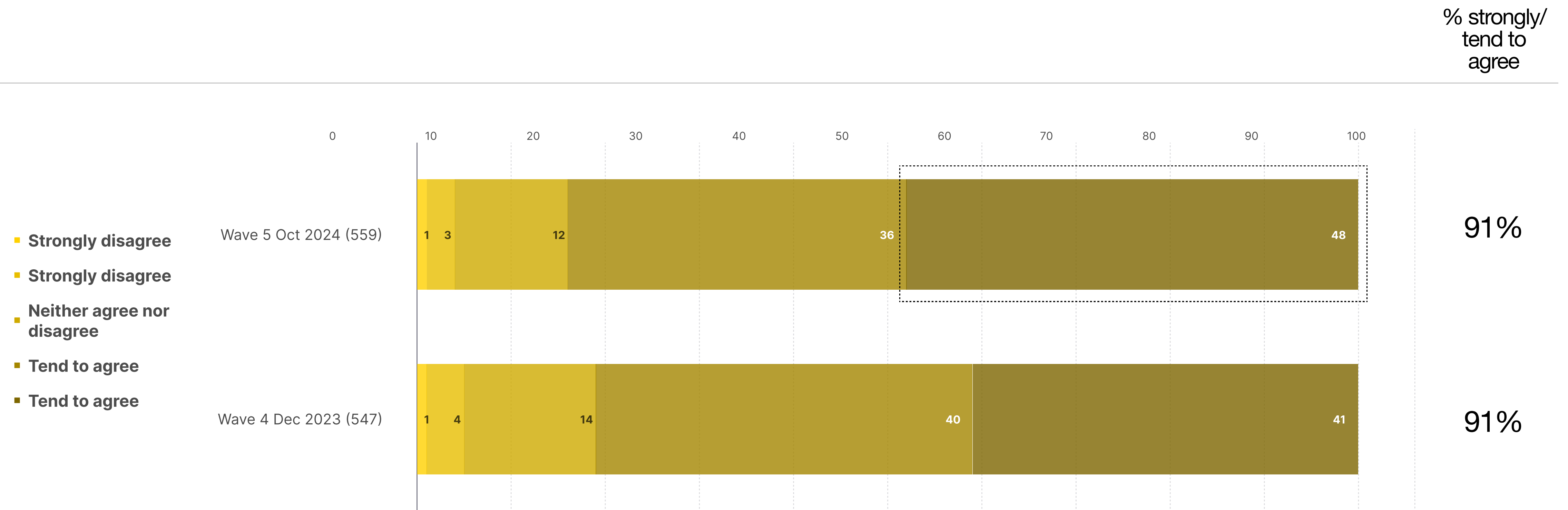
- Our organization actively resists AI
- Our organization is open to AI but has no plans to implement yet
- Our organization has trialed some uses of AI but it is not yet widely used
- Our organization has implemented some AI and has concrete plans to increase its use
- Our organization is embracing AI potential and is very actively implementing it



Q28W5. Which of the following best describes your organization's attitude towards Artificial Intelligence (AI)?
 Base: shown in brackets – all valid responses

Concerns about the economy have increased the need to adapt and modernize IT.

Almost half (48%) of participants strongly agree that economic concerns drive their organization's need to upgrade IT, up 7% from last year

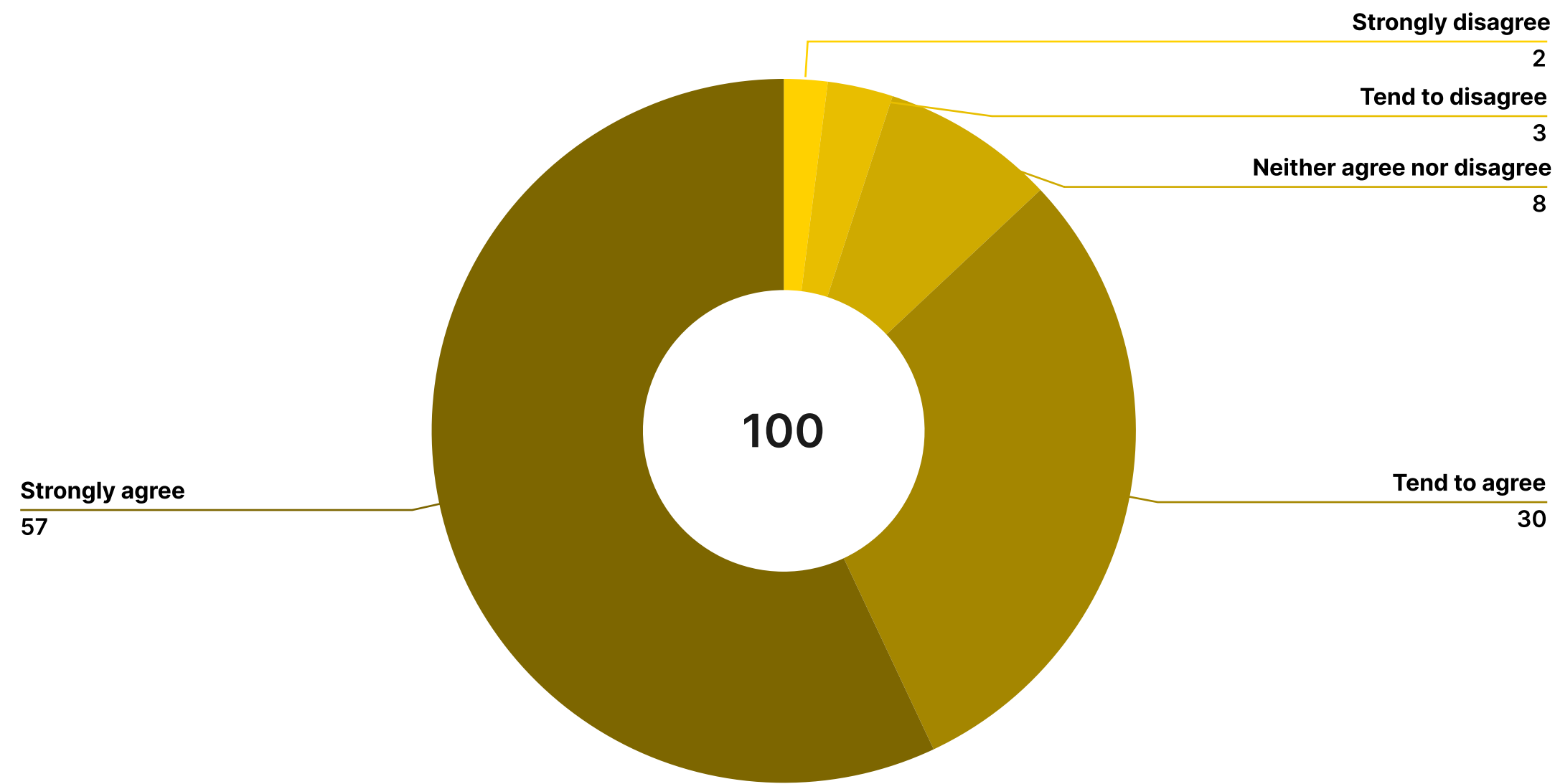


Q08/9. To what extent, if at all, do you agree or disagree with the following statements?: Concerns about the economy have increased the need to adapt and modernize our IT infrastructure. Base: shown in brackets – all valid responses

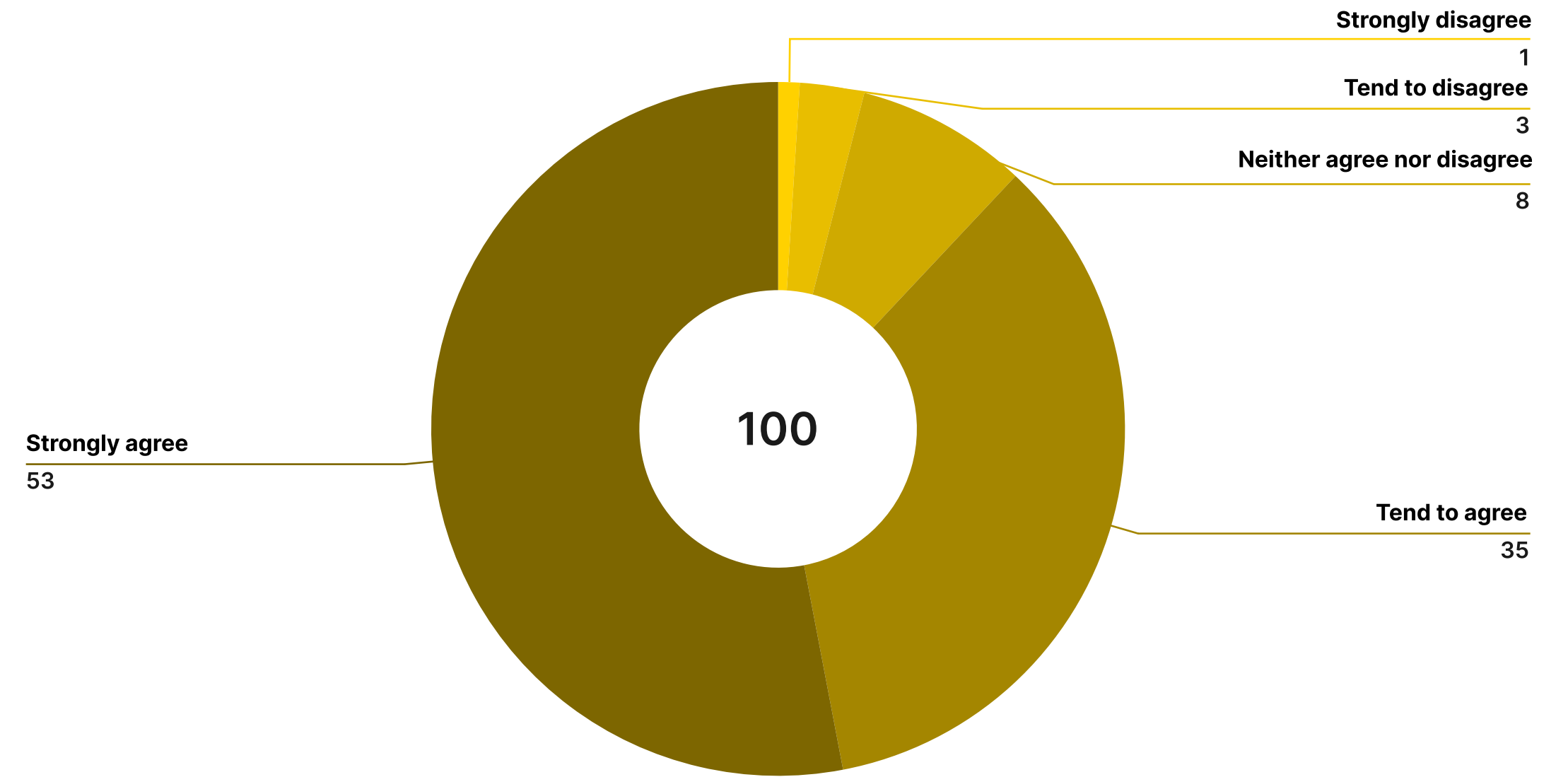
Innovation is critical to keep up with competitors.

Innovation enables organizations to meet customer demand and also plays a key role in demand generation. If an organization cannot do this, someone else will. The majority of respondents recognize this and many feel that their organization has the right mindset for innovation.

Organizations who do not innovate now will be left behind (561)



Our organization is open to experimentation and innovation (560)



● Strongly disagree ● Tend to disagree ● Neither agree nor disagree ● Tend to agree ● Strongly agree

● Strongly disagree ● Tend to disagree ● Neither agree nor disagree ● Tend to agree ● Strongly agree

Q08/6. To what extent, if at all, do you agree or disagree with the following statements?: Organizations who do not innovate now will be left behind
 Q26W5/7. Which of the following best describes how strongly you agree or disagree with the following statements?: Our organization is open to experimentation and innovation
 Base: Shown in brackets – all valid responses