THE POWER OF MACH

2024 BUSINESS VALUE OF MACH TECHNOLOGIES GLOBAL REPORT

The world's foremost report quantifying and benchmarking the strategic business value of MACH technologies.

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Foreword

This is the second year we have run the Business Value of MACH Global Survey, and our 2024 results reveal an important shift: MACH technology has quickly evolved beyond an IT solution, and its value is recognised business-wide.

MACH has become a driver of business performance and transformation, as evidenced by increased investment in MACH projects. Last year, 52% of organisations planned to invest £1-3 million in MACH technologies; in our latest survey, that figure has risen to 65%.

Companies adopting MACH principles and solutions from MACH Alliance members are also creating a competitive advantage. The ability to bring new business capabilities to market faster is the #1 benefit for current MACH users, followed closely by quicker responses to market changes.

65% **of companies plan to invest £1-3 million in MACH technologies over the next 18 months**
A 13% increase on last year.

The purpose of this ground-breaking survey is to provide a comprehensive benchmark into the value of composability, and this year's results show that MACH is no longer optional for organisations. Gartner estimates that by 2027, at least 60% of new B2C and B2B digital commerce solutions developed for the cloud will be aligned with MACH architecture principles.

The question has shifted from "if" we should adopt MACH technologies to "how" we can create maximum value from our investments in MACH. How can we implement MACH effectively, measure its impact and ensure it drives tangible results?

Our unique insights will give companies from across industries the ability to assess and benchmark their current use of MACH technologies and to build a business case for future MACH investments.

The future of technology is composable. Organisations that harness MACH capabilities while rigorously measuring outcomes will be best positioned to thrive.

Johan Benoualid
Chief Sales and Alliances Officer
OneStock

Jonathan Summerfield
CEO & Founder
Xiatech

Key Findings

By running the Business Value of MACH Technologies initiative annually, Xiatech, OneStock and supporters are tracking the growing adoption of MACH technologies and the value organisations are creating year on year.

> **Xiatech is proud to have partnered again with OneStock to run this year's Business Value of MACH Technologies Survey. This has become, in a short period of time, the go-to benchmark for organisations seeking to confidently determine what business results they should expect from their MACH technology investments.**

Jonathan Summerfield
CEO & Founder
Xiatech

This year's survey revealed higher investment levels and broader adoption across retail organisations compared to 12 months ago. Organisations using MACH have also experienced exceptional returns, as they benefit from improved efficiency, faster innovation and an agile response to market changes.

Here are the key findings from the 2024 survey, which ran from April to October 2024:

Companies recognise the importance and value of MACH technologies

79% of retail organisations have leveraged MACH technology in their projects, with **88% planning to use MACH in the next 18 months**.

MACH ownership is spreading beyond IT

IT leaders still own the MACH agenda, with **53% of all initiatives sponsored by CTOs and CIOs.** However, there has been a **7% increase in MACH sponsorship by digital decision-makers** since last year, showing the growing recognition of MACH's value across functions or teams.

More companies are setting measurable MACH goals

47% of organisations now set specific business targets when implementing MACH initiatives – a 16% increase from last year.

Strategic objectives have shifted from time to efficiency

When we launched the survey in 2023, time-to-market was the top KPI for measuring the value of MACH technologies. In 2024, operational efficiency has become the primary metric, with **30% of companies prioritising this key performance indicator**.

MACH is creating a platform for innovation

33% of MACH users say it has enabled them to bring new business capabilities to market faster, and **28% say it helps them respond quicker to market changes**.

Returns from MACH projects are increasing - reaching 100% ROI

The number of companies seeing high returns from MACH investments has grown substantially since last year. In 2024, **19% of MACH users achieved 60-79% ROI** (up from 13% in 2023), and **a quarter of users are now seeing returns of 100% or more** - a milestone never reached before.

MACH users are making more significant savings

78% of companies generated savings of up to £1m per year using MACH technologies – up from 65% in 2023.

MACH projects are generating higher returns

The revenue impact of MACH has strengthened in 2024, with a notable shift towards higher-value returns. **48% of organisations generated between £500k - £3m from their MACH investments**, compared to 37% in 2023.

> **For organisations curious about the MACH journey, as well as for those that have been on this road for a while, last year's report provided ground-breaking insights and cutting-edge information inspiring decision makers to act. Being able to measure business impact and recognise the business value of MACH adoption is proving ground for the future. I'm excited for OneStock and Xiatech's survey again in 2024.**

Gireesh Sahukar
Vice President of Digital
Dawn Foods

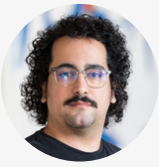
From technology initiative to strategic imperative

As MACH architectures mature and prove their worth, organisations have shifted from experimental adoption to strategic implementation, driven by specific business outcomes.

The 2024 Business Value of MACH Technologies Global Survey demonstrates this evolution. 47% of companies are now setting specific business targets and outcomes when implementing MACH - an increase from 30% in 2023.

This surge in outcome-focused implementation reflects a growing understanding that MACH is not merely a technology solution but a driver of business transformation.

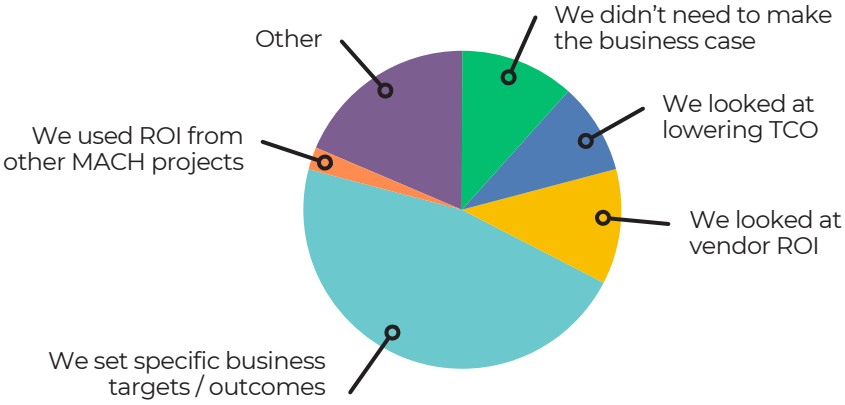
> **This year's Business Value of MACH Technologies Global Survey clearly shows that more organisations are adopting MACH, not only from the technological side but also from the business side. It's evident from the results that MACH is no longer a huge enterprise-level investment of time and resources but is quick to kick off and has measurable results from the early days.**



Gus Fune
CTO
divbrands & MACH Alliance Ambassador

Organisations are also taking a strategic approach to MACH investment decisions. The number of companies without a specific business case has almost halved since last year (22% to 12%), while fewer focus solely on cost factors. Only 9% of survey respondents considered 'lowering the Total Cost of Ownership (TCO)' their key driver when implementing MACH technologies, down from 17% in 2023.

When implementing MACH technologies for the first time, what was your primary business case for investment?



Enterprise-wide adoption accelerates

The strategic importance of MACH is evident in its growing influence across retail organisations. The shift from monolithic legacy systems to more flexible, modular solutions represents an implicit move toward MACH architecture.

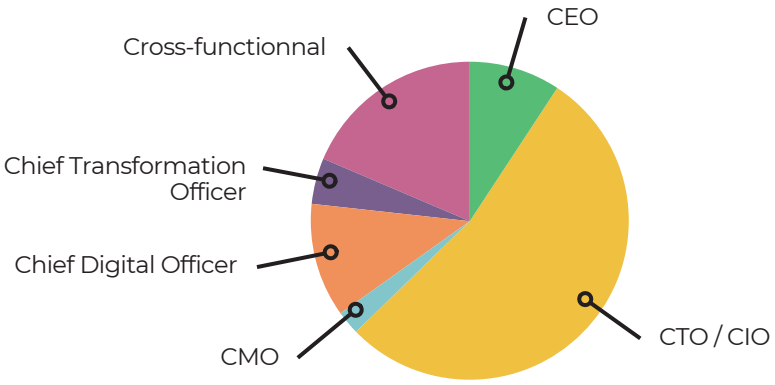
While IT remains the highest investment area for MACH technologies (attracting 37% of investments), use cases are spreading. Marketing now accounts for 19% of investments, Operations for 14%, and Merchandising/Buying for 7%.

This enterprise-wide adoption is reflected in leadership involvement, too. CTOs and CIOs still sponsor over half of MACH initiatives, a similar figure to last year. But Chief Digital Officer sponsorship has tripled from 4% to 12%, and Chief Transformation Officers have emerged as new champions, now accounting for 5% of initiatives.

Organisations are also rapidly expanding their MACH technology footprint across multiple business systems to create interconnected, agile digital ecosystems that span the entire customer journey.

E-commerce platforms are the most popular MACH-certified implementations (40%), followed by product information management systems (30%), content management systems (24%), payment solutions (24%) and integration platforms (24%).

Who in the management team is sponsoring MACH in your business?



> **The true strength of MACH lies in its ability to future-proof consumer experiences. By leveraging MACH principles, engineering teams can dedicate their time and efforts to creating revenue-driven consumer experiences, rather than being burdened by the maintenance of legacy systems that hinder digital growth.**

Sezin Cagil
Principal Delivery Lead - Digital
Selfridges & MACH Alliance Ambassador

MACH delivers exceptional business value

The 2024 Business Value of MACH Technologies Global Survey definitively shows that MACH projects generate remarkable returns, providing strategic value to retail organisations.

MACH adoption is transforming bottom-line performance, with nearly half (47%) of companies achieving a return on their investment. The scale of return has grown year-on-year: 19% of MACH users generated 60-79% ROI in 2024 compared to 13% last year. And in a breakthrough achievement, a quarter of organisations are now generating returns exceeding 100%.

> **The now annual Business Value of MACH Technologies survey has become an invaluable asset for not just those organisations considering MACH technologies, but also for those businesses who are looking to create more value from their MACH investments.**

> **This year's report has revealed that organisations continue to increase the ROI of their MACH stack, demonstrating MACH principles as a clear driver of business performance and value creation.**

Holly Hall
Managing Director
MACH Alliance

These impressive returns are driven by MACH's ability to address critical retail challenges. 33% of companies report faster deployment of new business capabilities, while 28% cite improved market responsiveness. For retailers facing rapid market changes and fluctuating consumer demands, this agility is invaluable.

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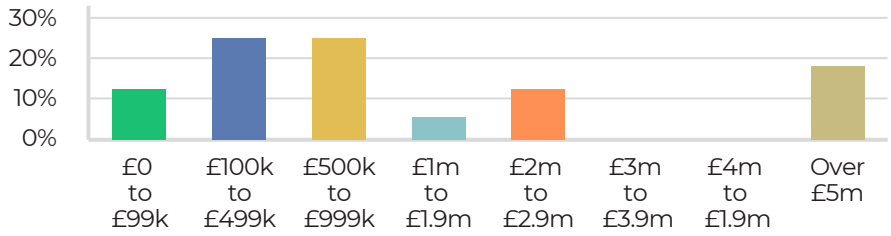
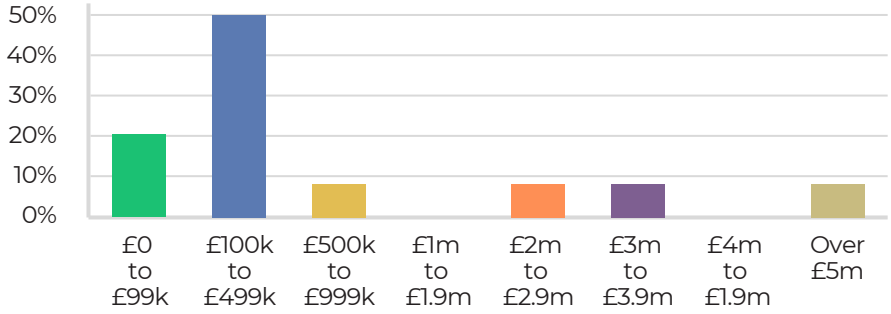
What revenue have you generated from your MACH technology investment?



MACH-driven cost savings have also improved significantly, with 78% of organisations now achieving annual savings of up to £1m; a 13% increase on last year's results.

What savings have you generated from your MACH technology investment?



The old technologies, complex code bases and high operational costs of the past decade are being replaced by a lean connected web of right-sized headless SaaS solutions that enable businesses to meet needs quickly, evolve faster and with lower costs, and completely own the digital face for their brands. This transformation is only accelerating to deliver value while dramatically lowering operational complexity and costs for more and more businesses.

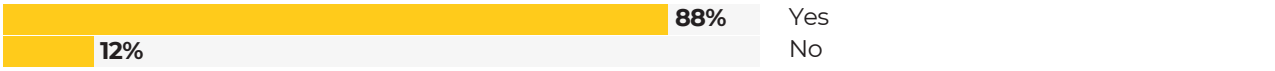
Gordon Lucas
CTO
divbrands & MACH Alliance Ambassador

Survey Questions & Answers

We have provided in this section the questions asked of the survey takers, and their answers.

1. Has your company leveraged a project using MACH technologies?

2. Do you plan to do so in the next 18 months?



3. Have you implemented technology from a MACH Alliance member?

4. Who in the management team is sponsoring MACH in your business?

5. When considering implementing MACH technologies for the first time, what was the primary business case for investment?

A sample of other business cases for investment

- *Agility of delivery*
- *Scalable architecture*
- *Replacing legacy systems*

6. Do you measure the business value/result of MACH?

A sample of the answers to why organisations don't measure the value of MACH

- *We haven't got into a process of measuring the business value of implemented initiatives properly yet*
- *Immaturity of the organisation as whole in not measuring business value and delivery outcomes*
- *Changing goal posts*

7. What Key Performance Indicators do you use to measure the value of MACH technologies?

A sample of other KPIs used to measure the value of MACH

- *Perceived levels of cohesion and coupling in the architecture*
- *Perceived vendor lock-ins*
- *Flexibility*

8. Have you generated a Return on Investment (ROI) from embracing MACH technologies?

9. If you have generated an ROI from leveraging MACH technologies, what has been the net result to date?

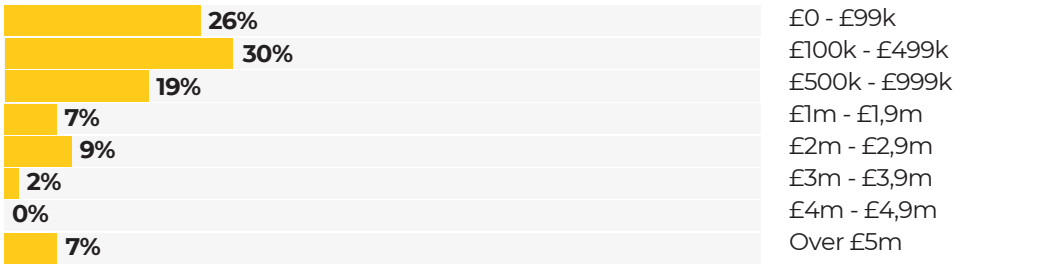
10. Where in your business have you invested the most in MACH technologies?

A sample of the other business areas that have invested in MACH technologies

- *Digital*
- *E-commerce*
- *Customer*

11. What value has your company generated from MACH technologies?

12. How much does your business plan to invest in MACH technologies annually over the next 18 months?



Global supporters

Thank you to the organisations that have supported Xiatech and OneStock in making the 2024 Business Value of MACH Technologies Global Survey possible:

BIGCOMMERCE

BigCommerce (Nasdaq: BIGC) is a leading open SaaS and composable ecommerce platform that empowers brands and retailers of all sizes to build, innovate and grow their businesses online. BigCommerce provides its customers sophisticated enterprise-grade functionality, customization and performance with simplicity and ease-of-use.

mapp

Mercaux's Omnichannel Store Platform empowers retailers to deliver exceptional shopping experiences, both in-store and remotely. A single app for store associates offers assisted selling, clienteling, omni-POS, fulfilment, and remote selling. Self-service customer solutions include progressive web apps, digital fitting rooms and self-checkout.

At Mapp, we understand that the future of technology rests on adaptability and integration. Embracing MACH architecture is not just about staying current; it's about setting a foundation for continuous innovation and growth. The 'Business Value of MACH Technologies Survey' offers vital insights that empower businesses to leverage these modular, agile, and scalable systems, transforming challenges into opportunities. We are proud to support this initiative, recognizing its significance in guiding organisations towards more dynamic and responsive business models.

Maurizio Alberti
VP of Sales & Marketing
Mapp

MERCAUX

Mercaux's Omnichannel Store Platform empowers retailers to deliver exceptional shopping experiences, both in-store and remotely. A single app for store associates offers assisted selling, clienteling, omni-POS, fulfilment, and remote selling. Self-service customer solutions include progressive web apps, digital fitting rooms and self-checkout.

Since our inception, Mercaux has championed MACH principles in every solution we bring to market, providing our retail customers with agility, flexibility, and rapid time to value. We are delighted to support this important research once again, enhancing our community's understanding of perceived value and its evolution over time to ultimately deliver even more exceptional customer experiences.

Olga Kotsur
Co-founder & CEO
Mercaux

optimove

Optimove is the first Customer-Led Marketing Platform. Its solutions ensure that marketing always starts with the customer instead of a campaign or product. Customer-led marketing has been proven to deliver brands an average increase of 33% in customer lifetime value .It is the only customer-led marketing platform powered by the combination of 1) rich historical, real-time, and predictive customer data, 2) AI-led multichannel journey orchestration, and 3) statistically credible multitouch attribution of every marketing action.

Optimove has long recognised that a broader SaaS ecosystem requires interoperability standards. In fact, Optimove has been composable at the core for years. Leading brands use Optimove's platform to ensure personalised, relevant, marketing messages that connect with customers in real-time. Extending our proven marketing ROI benefits via a broader set of commerce processes is a real value add, as we can now extend those benefits with MACH Alliance partners, and benchmark those client benefits via the Business Value of MACH Technologies Survey.

Shai Frank
SVP Product & GM Americas
Optimove

Pimberly is an innovative, cloud-based SaaS PIM (Product Information Management), DAM (Digital Asset Management), and Workflow platform for all your product data and digital assets. It's designed to handle unlimited numbers of SKUs, data feeds, and channels for leading brands and businesses. A centralised hub enables you to create a vital golden record for all product information. Gather, store, enrich, and distribute everything to unlimited sales channels from one place.

As more companies adopt a composable first, MACH strategy and with more great technology solutions becoming MACH compliant it's important that we continue to gather valuable insights and share in what's working and what needs more focus – ensuring we exceed the business objectives for the customer is a fundamental principle for MACH alliance partners and this survey allows you to share your experiences, good and bad.

Martin Balaam
CEO & Founder
Pimberly

Sitoo, the cloud-native Unified Commerce Platform anchored by POS, helps global fashion and lifestyle retailers create positive shopping experiences every time and everywhere. Driven by the belief that shopping should be simple and seamless, Sitoo enables retailers to unify all physical stores and online sales channels in real time.

We know flexibility is the future of retail and MACH architecture is essential for retailers to keep pace with the rapid changes we always see in our industry. To think one vendor can keep pace with all the changes happening in retail is crazy. It's impossible. With the MACH approach that we take and support, retailers can build their own ecosystem with best-of-breed solutions built to adapt to change. Supporting the Business Value of MACH Technologies Survey aligns with our vision of driving retail excellence through cutting-edge MACH solutions.

Jens Levin
CEO & co-founder
Sitoo

OneStock

OneStock is Europe's market-leading distributed order management system provider. We help retailers unlock their full omnichannel potential and power some of the world's most convenient shopping experiences. Our cloud-native SaaS solution improves operational efficiency, increases online revenue and enhances customer experience.

contact@onestock-retail.com

onestock-retail.com

linkedin.com/company/onestock

xiatech

Xiatech is the pioneer of Xfuze, the world's first AI-powered composable Integration, Data Management and Analytics Platform that innovatively connects systems, creates a single view of data and delivers actionable insights in one solution. Business and technology teams that use Xfuze are able to shorten time-to-insights, accelerate digital transformation, and extend the value of their legacy technology investments. To learn more about how organisations are quickly generating results in weeks, visit www.xiatech.io or our Xfuze Showplace.

marketing@xiatech.co.uk

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