



FOR IMMEDIATE RELEASE

New Vertex Research Highlights Rising Revenue Risk from IT, Tax, and Finance Misalignment

Only 12% of organizations globally have fully integrated tax technology, even as real-time compliance becomes business critical

KING OF PRUSSIA, PA – May 19, 2026 – [Vertex Inc.](#) (NASDAQ: VERX) (“Vertex” or the “Company”), a leading provider of enterprise compliance technology for global commerce, today announced the release of new global research revealing that gaps between IT, Tax, and Finance teams are becoming a growing barrier to compliance. These gaps are exposing organizations to disruption and putting revenue at risk as regulatory demands accelerate.

The 2026 study, *[How IT, Tax, and Finance Misalignment Is Putting Revenue at Risk](#)*, is based on a Vertex commissioned survey of 1,050 senior IT, Finance, and Tax leaders across manufacturing, retail, technology, healthcare, financial services, professional services, legal, and others in the U.S., UK, and Europe. The findings show that despite widespread awareness of the benefits of close collaboration, these key teams often fail to work together effectively. As a result, many businesses are facing challenges around governance, data quality, and ownership at a time when compliance increasingly happens in real time. At the same time, businesses are accelerating ERP modernization, automation, and AI initiatives to manage growing scale and complexity. This could amplify fragmentation if underlying issues remain unresolved.

“These findings are consistent with what we are seeing across the market,” said Kevin Permenter, Research Director, Financial Applications and Agents at IDC. “Many organizations recognize the need for closer alignment between IT, Tax and Finance, but are still early in translating that into consistent operating models. As compliance requirements move closer to real time and organizations accelerate investment in automation and AI, gaps in governance, data quality and ownership are becoming more visible and more impactful on business outcomes.”

Sal Visca, Chief Technology Officer at Vertex also shared: “When tax, IT, and finance teams aren’t aligned from the start, businesses can end up with systems that look fine in concept but struggle in practice, leading to blocked transactions, delayed revenue, and higher risk.”

Key findings from the research include:

- **Ambition exceeds execution:** Only 12% of organizations say they have achieved full, end-to-end tax technology integration, even though 94% expect stronger collaboration across IT, Tax, and Finance.
- **AI adoption is outpacing governance:** Meanwhile, 26% of businesses are already using AI-assisted integration monitoring, often before governance models are fully in place.

- **Poor collaboration hurts ROI:** Nearly a third (31%) link poor collaboration to data issues, wasted investment, or weak returns on tax technology initiatives.
- **Tax is underrepresented:** Tax teams are consulted on tax technology decisions just 37% of the time, compared with 52% for IT and 49% for Finance.
- **Data confidence is low:** Confidence in tax-ready data remains fragile, with only 37% reporting high confidence in the quality of their master data.

Regional insights highlight differing levels of exposure:

- **U.S.:** 77% of organizations report high concern, driven by rising transaction volumes (82%), data complexity (80%), and the pace of digital transformation (79%).
- **UK:** 75% of businesses report concern, with misalignment already having an impact as 26% report wasted spend and 29% cite fragmented systems.
- **DACH:** This region has reported the most structural challenge, with a 35-point gap between IT and Tax involvement and clear cost impacts, including 38% citing wasted spend and 38% fragmented systems.

“As governments roll out e-invoicing mandates and real-time reporting rules, compliance is becoming a gatekeeper for transactions, not a box to tick after the fact,” said Visca. “At the same time, organizations are accelerating ERP upgrades, automation, and AI to manage scale and complexity. If IT, Tax and Finance are not aligned on ownership and decision-making, it will lead to magnified risk, allowing errors to move further and faster through the business.”

The report makes clear that technology alone is not the answer. Organizations that manage tax compliance most effectively bring IT, Tax, and Finance together early, set clear roles and decision rights, align on shared measures of success, and keep governance up to date as regulations and systems evolve.

The full report is available to download [here](#).

About the Study

The research was commissioned by Vertex and fielded by Censuswide in January 2026. The survey reached 1,050 senior IT, Tax, and Finance decision-makers at organizations with annual revenues ranging from \$100 million to over \$1 billion across the U.S., U.K., France, DACH (Germany, Austria, and Switzerland), Nordics (Denmark, Norway, Sweden, Finland), and Benelux (Belgium and the Netherlands). The study examined how organizations collaborate on indirect tax compliance, tax technology implementation, and governance in the face of evolving regulatory requirements.

About Vertex

Vertex, Inc. is a leading provider of tax and compliance technology for global commerce, combining deep domain expertise with advanced technologies and responsible AI to help businesses transact, comply, and grow with confidence. Powered by AI-driven tax automation, Vertex enables global enterprises to manage complex tax workflows with greater speed, accuracy, and agility.

Headquartered in North America, and with offices in South America and Europe, Vertex empowers the world's leading brands to simplify the complexity of continuous compliance.

For more information, visit www.vertexinc.com or follow us on [X](#) and [LinkedIn](#); or subscribe on [YouTube](#).

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