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Only One in Six Enterprises Treats Indirect Tax as a Standing Board Item

The 2026 Vertex CompOps™ Index finds that enterprises where indirect tax reaches the board regularly, are four times less likely to say errors are most often identified externally and nearly twice as likely to answer tax-authority notices within five business days.

KING OF PRUSSIA, PA, November 10, 2026 — Vertex, Inc. (NASDAQ:VERX) ("Vertex" or the "Company"), the Decision-to-Defense™ global indirect tax and compliance company, today released the 2026 Vertex CompOps™ Index, a global study of how enterprises govern indirect tax and compliance, and how closely tax, IT, and finance work together to run it.

At most enterprises, indirect tax has no standing place in the room where strategy is set. Only one in six (16%) reports it as a standing item at board or executive-committee level, and at 43%, it surfaces only when a problem arises, if ever. Those that discuss it there at least periodically look markedly different. They are one-quarter as likely to say their errors are usually identified by external parties (4% vs. 16%), nearly twice as likely to answer a tax-authority notice within five business days (48% vs. 26%), and half as likely to make and verify taxability changes entirely by hand (13% vs. 26%).

"Indirect tax is one of the few functions where determinations are made continuously, exposure is lasting, but conversations about risk are episodic and after the fact," said Allison Cerra, Chief Marketing Officer at Vertex. "The enterprises running indirect tax best govern it like any other strategic function, as a recurring part of how the business is run, not only when issues surface. The gap between those two postures is not a matter of scale. It is a matter of attention."

The gaps extend to AI. Among enterprises that discuss indirect tax at least periodically at the board level, 54% say AI now operates largely autonomously or handles routine work in their tax workflows, compared with 21% of those that do not. They are also more likely to have a dedicated budget and a named executive owner for AI in indirect tax.

The Index also sorts enterprises into four tiers of AI capability in indirect tax and compliance, scored on data and system readiness, enablement, governance, and deployment. The most capable tier (13% of enterprises studied) treats indirect tax as an investment priority rather than a maintenance item: 85% of its IT leaders describe it as a funded strategic priority on the technology roadmap, against 5% in the least capable tier. The most capable tier also stays ahead of regulatory change: 55% proactively monitor for changes with automated updates, against 9% of the least capable tier.

Every group shares one problem: proving their tax position. About half of enterprises (52%) take a more conservative approach when they lack sufficient evidence, and among those holding indirect tax reserves, 73% say at least a quarter of the reserve is tied to tax treatments they cannot readily substantiate, not because the law is unclear.

"The findings suggest that operational maturity in indirect tax is less about organization size and more about governance," said Kevin Permenter, Research Director, Enterprise Applications at IDC. "With compliance requirements becoming increasingly continuous, organizations that integrate tax into

broader business and technology decisions appear far better positioned to adapt to change, manage risk proactively, and maintain visibility across the compliance lifecycle."

The 2026 Vertex CompOps Index reveals where indirect tax risk hides and how leading enterprises get ahead of what's next. It is available at https://vertexcompops.kinsta.cloud/.

About Vertex
Vertex is the Decision-to-Defense™ global indirect tax and compliance company. Vertex helps enterprises bring control to indirect tax and compliance across the full transaction lifecycle — from tax determination and e-invoicing through reporting, filing, and audit defense — to make outcomes easier to prove and improve over time. Trusted by more than 60% of the Fortune 500, Vertex combines decades of tax expertise, deep global tax and compliance knowledge, and embedded integrations to help organizations operate globally with confidence. With headquarters in North America and offices in South America and Europe, Vertex's purpose is to ensure businesses and communities thrive through trusted transactions.

For more information, visit www.vertexinc.com or follow us on X and LinkedIn, or subscribe on YouTube.

About the research
The 2026 Vertex CompOps Index is based on a double-blind survey of 750 decision makers at enterprises with at least $250 million in annual revenue and 1,000 or more employees, conducted by Emerald Research Group on behalf of Vertex in August and September 2026. Respondents were drawn from the United States, the United Kingdom, Germany, and France, and spanned information technology, tax, and finance functions, each with authority over or influence on enterprise indirect tax and compliance technology decisions. Respondents were not informed of the study's sponsor. Results are weighted.

The Index sorts enterprises into four tiers of AI capability, scored from 0 to 100. References to the "least capable" and "most capable" tiers refer to the lowest and highest of those four, which represent 20% and 13% of the enterprises studied, respectively. The tiers are not quartiles. Comparisons by board-level cadence are based on finance and tax respondents (n=369) and describe differences between organizations at a single point in time; they do not establish that board-level attention causes any outcome. Certain measures were asked only of specific functions and are reported on that base. The study measured where errors are identified, not how frequently they occur; no comparison of error rates between organizations is implied. Full methodology is available in the report.

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