

Hyperscaler Marketplace Insights: Leading Growth In Partner Ecosystems

A practical guide to understanding hyperscalers.
Learn how to drive **partner-led cloud growth** with
guidance and strategies from industry leaders.



Table of Contents

Executive Summary	3		
Section 1: History of Hyperscalers	4	Section 5: HyperscalerGTM	19
Overview	4	Overview	19
Major Milestones from Hyperscaler Growth	6	Core Capabilities	20
Aligning Strategy with Cloud Readiness	7	Channel Differentiators	21
Section 2: Why Hyperscalers Are Important	8	Partner to Marketplace Maturity Model	22
Market Leaders	8	Strategic Impact	23
Emerging Players	9		
Ecosystem Enablers & Partner Impact	10	Section 6: Recommendations & Next Steps	24
Current Market Drivers	11	Immediate Opportunities	24
Section 3: Hyperscaler & Cloud Market Trends	12	Strategic Growth & Future-Proofing Ecosystem	25
AI & Cloud Imperatives	12		
PRM, Edge, Marketplace, Cloud Macro	13	Appendix	26
Section 4: Charting Hyperscaler Opportunities with PRM	14		
Marketplace Incentives Explained	15	Contributor Bios	27
Incentives Strategies	16		
Best Practices for Incentives	18	Closing Page	33

Executive Summary

Hyperscaler marketplaces have become a primary enterprise buying path, consolidating discovery, evaluation, and procurement while raising the bar on governance and data integrity. This guide captures this evolution, examining the key phases of marketplace adoption and the lessons learned as strategy, technology, and partner enablement continue to converge.

As AI, multi-cloud architecture, edge computing, and regulatory pressures accelerate change, partners are rethinking how they create and measure value. This playbook provides a practical framework for navigating that shift, offering guidance on marketplace monetization, co-sell collaboration, partner relationship management (PRM) optimization, and technical enablement. It also highlights the importance of transparency and data trust as the foundation for scalable, data-driven growth.

Hyperscaler marketplaces are no longer just transaction platforms; they are becoming the operating systems of the cloud economy. Partners that succeed are those who adopt real-time collaboration, leverage intelligent automation, and share data with confidence. With insights and contributions from top leaders in the industry, this guide shows how aligning strategy with measurable outcomes can turn complexity into momentum and transform partnerships into networks of adaptive, intelligent growth.

Why Hyperscalers Matter

Hyperscalers power partner ecosystems by providing scalable cloud infrastructure, creating revenue opportunities through services and resell programs, and enabling collaborative co-sell strategies that deliver greater value to shared customers.

Metric	Insight
Market Share	Top hyperscalers represent approx. 65%* of cloud revenue in 2025
Partner Adoption	60% of partners' clients are currently using just one or two hyperscaler vendors on average
Growth Rate	Ecosystem revenue growing at 25% CAGR
Marketplace Listings	Over 30,000* solutions available globally

Impact:

Drives measurable revenue acceleration

Reduces friction in multi-party deals

Enables data-driven collaboration

“Cloud and hyperscalers didn’t just modernize enterprise IT—they rewired its economics, operating model, and routes to market. Infrastructure became software, consumption replaced procurement, and ecosystems—not vendors—became the new unit of scale.”



Jay McBain
Chief Analyst
Omdia



Section 1: History of Hyperscalers

Overview

Cloud computing has evolved from traditional on-premise IT to globally distributed, scalable systems, redefining how enterprises and mid-market organizations deploy and manage technology.

Hyperscalers, which provide massive compute, storage, and networking resources, have been central to this shift.

Early IT relied on vertical scaling, adding processing power, memory, and storage to individual servers, which was costly and inflexible. Hyperscalers introduced horizontal scaling by adding more servers to handle workloads across a network. This approach allowed for:

- Improved performance with lower cost
- Greater operational flexibility
- Rapid scaling to meet spikes in demand

1 From Traditional IT to Cloud & Hyperscaler Dominance

In the late 1990s and early 2000s, hyperscalers were mainly associated with massive data centers and specialized hardware. The Dotcom era highlighted the limits of traditional IT as businesses struggled to handle growing internet traffic. Hyperscale operations showed that true scalability required:

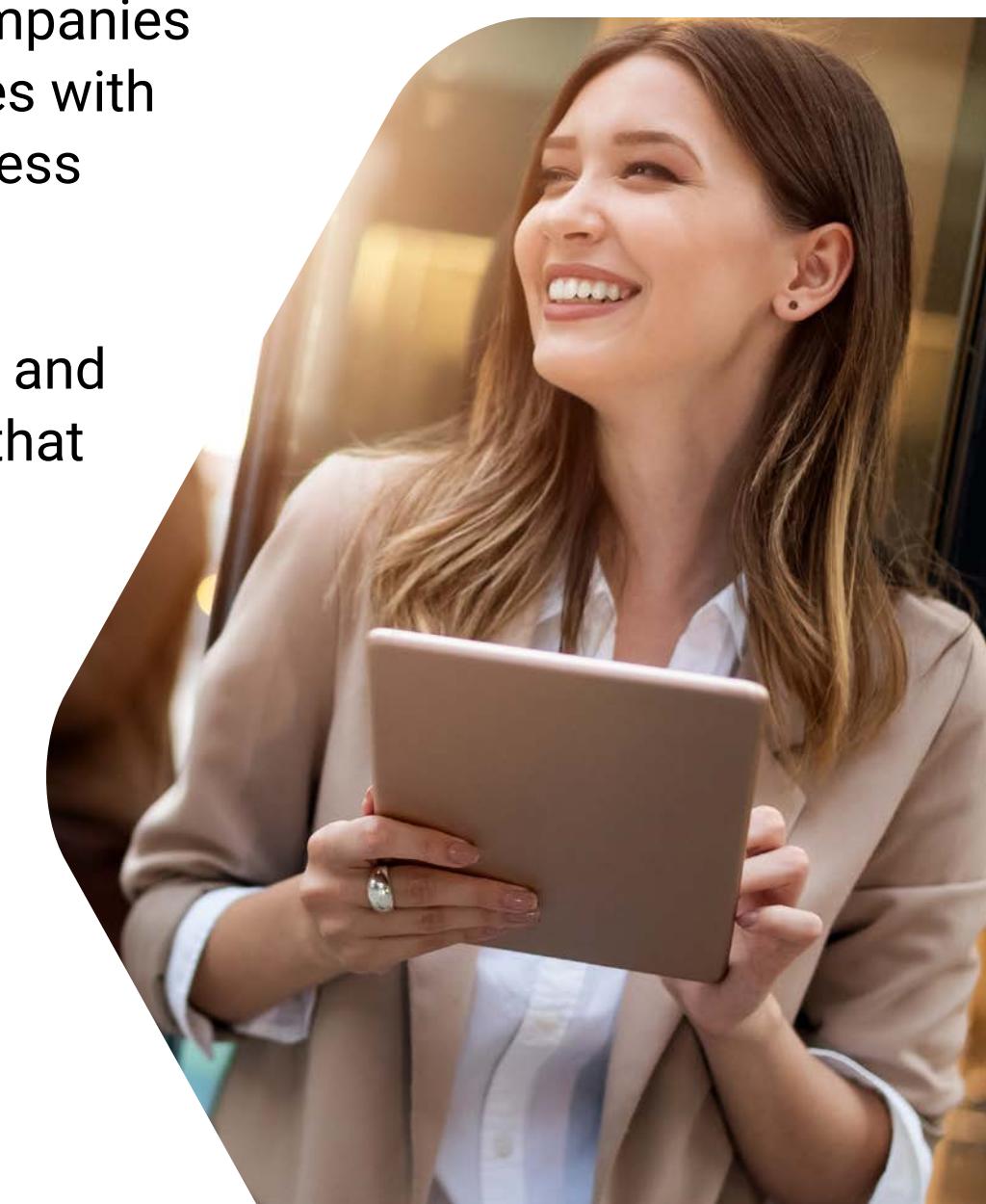
- Distributed computing and storage
- Advanced network architecture
- Efficient data redundancy

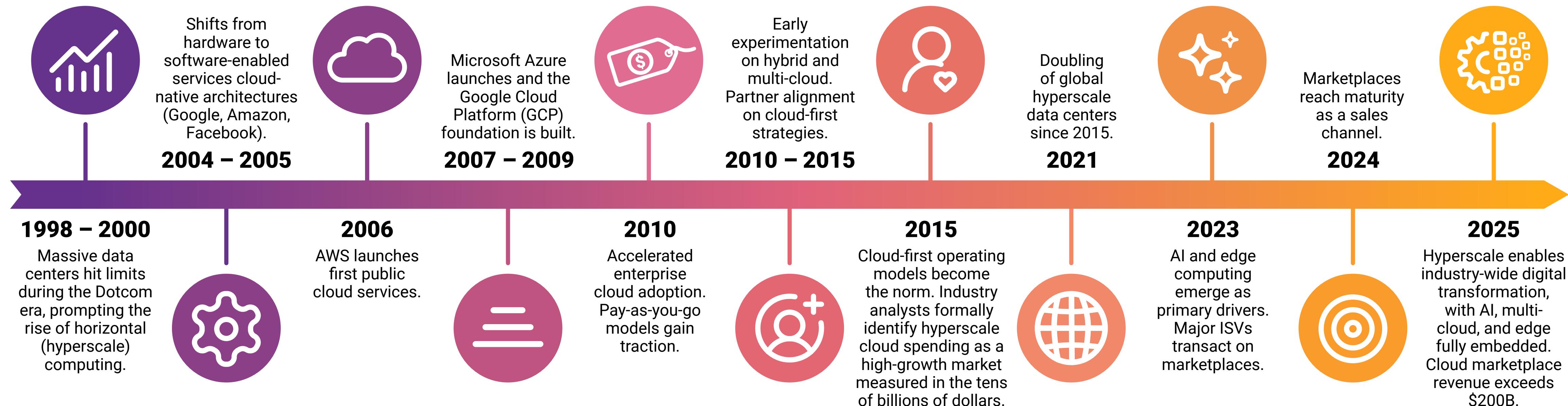
The term *hyperscale* emerged to describe data centers that could scale horizontally by adding servers instead of upgrading individual machines, shifting from vertical scaling to setting the stage for a new computing model.

By the mid-2000s, focus shifted from hardware to software-enabled services. Companies such as Google, Amazon, and Facebook, now Meta, built cloud-native architectures with automation, distributed computing, and resource elasticity. Businesses could access hyperscale capabilities without owning large data centers.

Initially, enterprises were cautious about cloud adoption due to security, reliability, and regulatory concerns. By 2010, adoption accelerated as organizations recognized that hyperscale services offered greater flexibility, pay-as-you-go models, and scalable infrastructure aligned with actual usage rather than projected demand.

Today, the world's largest hyperscale cloud platforms, Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform (GCP), underpin the digital-first economy, enabling scalable, on-demand infrastructure that drives innovation across industries.





"The biggest shift is that hyperscaler marketplaces are moving from being procurement shortcuts to being ecosystem operating systems... The winners will be those who treat hyperscaler programs not as 'channels' but as **data-sharing networks that accelerate every part of the go-to-market motion.**"



Bob Moore
CEO
Crossbeam



"The conversation is shifting from 'Should we be in the marketplace?' to '**How do we build a repeatable, revenue-generating marketplace engine?**' Success comes from being strategic, measurable, and fully integrated into how hyperscalers go to market. Partners who treat the marketplace as a true sales channel rather than a listing exercise will lead the field."



Juhi Saha
CEO
Partner1



2 Emergence of Hyperscaler Leaders

Three companies dominate the hyperscaler market: Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform (GCP). AWS pioneered public cloud services in 2006 and gained early momentum through developer-friendly APIs and a strong partner ecosystem. Microsoft Azure built on deep enterprise relationships and integration with Windows Server and Office 365. GCP leveraged Google's infrastructure expertise to differentiate through advanced analytics, machine learning, and data-centric workloads.

"The real inflection point came when cloud stopped being a place to migrate workloads and became the platform for building, scaling, and automating the business itself. **The partners who grew fastest were the ones who treated cloud as a new operating system rather than a new hosting model."**



Kristine Stewart
Senior Partner
Evangelist
Spur Reply



3 Major Milestones from Hyperscaler Growth

The growth of hyperscalers reflects how enterprises and mid-market organizations adopted cloud computing in stages and learned important lessons about strategy, readiness, and alignment.

Key Milestones in Adoption

- Early experimentation:** Running non-critical workloads such as testing and development environments.
- Hybrid expansion:** Combining cloud and on-premise systems to balance flexibility and control.
- Multi-cloud adoption:** Leveraging multiple hyperscalers for resilience, performance, and regulatory compliance.
- Cloud-first strategies:** Positioning cloud computing at the center of digital transformation initiatives.
- Partner program alignment:** Integrators, ISVs, and distributors evolved business models to align with hyperscaler priorities, expanding services and co-sell capabilities.

These milestones present a shift from cautious exploration to strategic integration, illustrating how organizations matured their cloud adoption while adapting their partner ecosystems.

Core Lessons: Aligning Strategy with Cloud Readiness

Aligning Strategy with Cloud Readiness



Digital transformation now requires full alignment across strategy, infrastructure, data architecture, and workforce readiness. Ambitious cloud strategies fail without the operational and human capabilities to support them.



Successful cloud adoption depends on coordinated planning, continuous enablement, and disciplined change management. Migration alone does not deliver value.



The shift to hyperscale environments represents a fundamental operating model transformation, reshaping business models, processes, and enterprise skill sets.

“Partners must fundamentally shift from transactional product sales to specialized, consumption-based services focused on AI integration, edge infrastructure, and multi-cloud data management... Success requires partners to transform from infrastructure migration specialists into high-value solution providers who can navigate the technical, regulatory, and ethical complexities of emerging technologies.

In hyperscale ecosystems, partners are evolving from traditional cloud resellers into specialized AI/ML solution providers. Mastery of advanced platforms, integration of AI agents, and operational excellence—including security and regulatory compliance—are key to standing out. Successful partners offer full-service portfolios, from customized deployments to hybrid and platform-agnostic solutions, creating high-value outcomes across competing ecosystems.”



Neeti Gupta
PhD candidate
Founder & CEO
AI Partnerships



Section 2: Why Hyperscalers Are Important

Hyperscalers are driving the digital economy, fueling AI innovation, multi-cloud adoption, and enterprise transformation. While the clear market leaders, Amazon Web Services (AWS), Microsoft Azure (Azure), and Google Cloud Platform (GCP), continue to dominate, other players are rapidly redefining what it means to be a hyperscaler.

1

Market Leaders



Amazon Web Services (AWS)

AWS is the market leader in global cloud infrastructure, holding roughly 30% market share and generating over \$100 billion in annual revenue. Its ongoing investments in AI infrastructure and generative AI services have strengthened its role as a primary platform for data-intensive and AI-driven workloads.



Google Cloud Platform (GCP)

Google Cloud captures roughly 13% of the market and remains the fastest-growing major hyperscaler. With around \$12 billion in Q4 2024 revenue, GCP's growth is fueled by AI, analytics, and expanding enterprise adoption.



Microsoft Azure

Microsoft Azure holds about 20% of the global market, powered by deep enterprise integration and continued double-digit growth. Its cloud business exceeds \$135 billion in annual revenue, driven by demand for AI and hybrid cloud solutions.



2 Emerging Players

ORACLE

Cloud Infrastructure

Oracle Cloud Infrastructure (OCI) is expanding its enterprise presence with strong adoption in AI, database, and high-performance workloads. OCI is growing quickly through new region and sovereign cloud offerings, with cloud revenue up 10% to \$33.2 billion in 2024 and market share rising to 5.1%.

snowflake

Snowflake is a cloud native data and analytics platform with \$2.8 billion revenue in FY2024 and 36% growth. Its multi-cloud data architecture and ecosystem model make it a key growth driver in the hyperscaler ecosystem, especially for SaaS and analytics workloads.

SAP

SAP Cloud (Europe) is a major software vendor shifting fully into cloud delivery, with 26% year-over-year cloud revenue growth in 2024. Its SaaS and PaaS offerings such as S/4HANA Cloud and SuccessFactors reflect the enterprise shift toward hyperscale modernization.

servicenow

ServiceNow is a leading SaaS platform for enterprise workflows including IT service management, HR, and operations with 21% year-over-year growth and 2024 subscription revenue of \$2.866 billion. It is embedding AI into its Now Platform® and broadening its scope beyond IT ticketing into full enterprise digital workflow.

Red Hat

Red Hat (IBM) plays a central role in strengthening IBM's hybrid cloud and AI strategy, driving enterprise cloud transformation through open-source innovation. Red Hat's revenue grew 17% year-over-year, contributing to IBM Cloud's 2% market share and approximately \$2 billion in quarterly revenue.

Alibaba Cloud

Alibaba Cloud (Asia-Pacific) is the leading Infrastructure as a Service (IaaS) provider in the region, with the largest share in mainland China and a growing global footprint. In fiscal 2025, revenue rose 5.9% to ¥996.35 billion CNY, driven by AI-powered services and continued cloud infrastructure investment.

3 Ecosystem Enablers

TD SYNNEX, HubSpot and Crossbeam are key players in the partner and cloud ecosystem. They enable partner-led growth, SaaS adoption, and marketplace transactions, supporting organizations in extending their cloud reach and building integrated solutions.

TD SYNNEX

TD SYNNEX offers the StreamOne® Cloud Marketplace, allowing MSPs, resellers, and partners to discover, buy, and manage cloud subscriptions and services. The platform supports IaaS, PaaS, and SaaS consumption, billing, and fulfillment across multiple cloud providers. TD SYNNEX is a marketplace and distribution enabler, making it a critical facilitator of cloud commerce without owning hyperscaler infrastructure.

HubSpot

HubSpot provides a large ecosystem through its Marketplace of apps and integrations, focused on CRM, marketing, operations workflows, SaaS, and partner-built applications. While it does not offer global cloud infrastructure, HubSpot is a SaaS platform with a partner marketplace that drives ecosystem growth and supports partner program expansion.

CROSSBEAM

Crossbeam is a secure data collaboration platform that enables partners and hyperscalers to share account and pipeline insights safely. It helps organizations identify co-sell opportunities, align sales teams, and operationalize joint GTM motions by connecting CRM and partner data systems. Crossbeam provides a trusted ecosystem intelligence layer, accelerating partner revenue by making data-sharing transparent, automated, and actionable.

4 Partner Ecosystem Impact

The partner ecosystems surrounding hyperscalers generates significant value across several areas:

 **Revenue growth:** Partner-led services and marketplace transactions contribute billions in annual global revenue.

 **Technical enablement:** Training programs, certification pathways, and solution accelerators help partners deliver advanced cloud solutions more effectively.

 **Marketplace presence:** Cloud marketplaces have become vital sales channels, allowing independent software vendors and system integrators to reach customers with greater speed and scale.

Strong collaboration between hyperscalers and partners ensures that innovation extends beyond core infrastructure, creating a broader environment for shared success.

5 Current Market Drivers

The continued evolution of hyperscalers is shaped by several key market forces:

- **Artificial Intelligence:** Demand for compute-intensive AI workloads drives investment in GPUs, model hosting, and AI-specific cloud services.
- **Multi-cloud strategies:** Organizations seek flexibility and resilience by distributing workloads across multiple providers.
- **Edge computing:** Bringing compute power closer to users supports faster data processing and reduced latency.
- **Regulatory pressures:** Data sovereignty and privacy laws influence where and how organizations deploy workloads globally.

These drivers position hyperscalers at the core of digital transformation strategies across industries.

"The number and ARR of migrations to cloud remain a primary focus area and KPI for partner success. Migration funding and programs can greatly reduce the TCO of cloud migrations and expedite migration engagements. Number of and ARR of AI-focused workloads is also a key KPI – **every hyperscaler is seeking to gain increased traction and dominate the AI market.**"

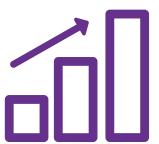


Matt Karst

VP New Vendor Acquisition –
North America
TD SYNNEX

 TD SYNNEX

Partner Impact & Trends



Strong market growth:

Canalys, now part of Omdia, forecasts sales will exceed \$45 billion by 2025 and reach \$85 billion by 2028.



Improved partner ROI:

Consumption-based pricing and recurring service models are helping partners generate higher returns.



Multi-cloud adoption:

Over 70% of enterprises are using multi-cloud or hybrid strategies to enhance resilience and performance.



Partner skills & speed:

Rising certification and specialization rates are enabling faster time-to-market for cloud solutions.



Section 3: Hyperscaler & Cloud Market Trends

The global cloud market continues to expand rapidly as hyperscalers redefine how organizations innovate, scale, and deliver digital services.

Several major trends are shaping the next phase of growth for both providers and their partners.

AI-Driven Partner Acceleration

Artificial intelligence is now a primary growth driver across hyperscaler ecosystems. Partners are using AI to enhance automation, improve customer insights, and accelerate go-to-market strategies. Cloud platforms are embedding AI capabilities directly into infrastructure and developer tools, helping organizations launch intelligent applications faster and more efficiently.

Multi-Cloud and Hybrid Imperatives

Enterprises are increasingly adopting multi-cloud and hybrid strategies to balance flexibility, cost, and compliance. This approach enables organizations to select the best cloud for each workload while maintaining consistent security and management across environments. Hyperscalers are responding by improving interoperability, network connectivity, and unified management frameworks.

"AI is rapidly becoming the accelerant reshaping every partner-led motion. For enterprises and ISVs, the opportunity is not only to streamline operations but also to identify the right partners, accelerate co-sell readiness, and move with greater precision across hyperscaler programs. Success in this next phase will come from intelligence applied at every step of the journey, not from scale alone."



Rebecca Jones
Chief Growth Officer & Partner
Bridge Partners



Nancy Ridge
President & Founder
Ridge Innovative
 RIDGE Innovative

"Through AWS ML services such as Bedrock and SageMaker, AWS is enabling partner AI solutions that can be used, resold, or embedded directly within partner portfolios. **This provides greater visibility and leverage for building GTM partnerships.**"



In the next three years, selling through hyperscalers will become the primary route to market, driven by customer behavior. The partners that fail to make the transition will likely die off. Staying competitive will require investing in data infrastructure and automation, the foundation for AI to power everything from partner private offers to deal attribution. The partners and vendors that succeed will be those who build this operational backbone, letting AI handle the rest.”

**Michelle Morgan**Director of
Partnerships
TiER1 Performance**Gina Bassile**Director, Channel
Strategy and Alliances
Maritz

“As hyperscaler marketplaces grow more vertical and crowded, partners need to stand out. Focus on one or two industries and build deep expertise. Co-sell closely with hyperscalers, productize repeatable services, and create a strong marketplace presence. **Most importantly, make your listing easy and engaging, and always lead with real business results.**”

Dynamic PRM Platforms

Partner Relationship Management (PRM) systems are becoming smarter and more adaptive. Advanced PRMs integrate analytics, automation, and AI to streamline onboarding, track partner performance, and personalize enablement. These platforms are critical for hyperscalers and distributors managing thousands of partners worldwide and for partners seeking faster access to resources and market insights.

Edge Computing and Distributed Cloud

Edge computing continues to move processing power closer to users, devices, and data sources. Hyperscalers are expanding their distributed cloud networks to support applications that require low latency and real-time decision-making. This trend is especially relevant for industries such as manufacturing, logistics, and telecommunications, where local processing improves reliability and performance.

Marketplace Monetization

Cloud marketplaces have evolved into major commercial hubs. Independent software vendors and integrators can now reach enterprise buyers through streamlined purchasing models that align with existing cloud budgets. Consumption-based pricing, simplified billing, and co-selling incentives are driving rapid marketplace growth and partner profitability.

Cloud Macro Trends

Broader market forces continue to influence hyperscaler strategy. Sustainability goals are prompting investments in energy-efficient data centers and carbon tracking. Regulatory frameworks are shaping regional deployment models and data governance. Meanwhile, demand for cloud-native development, cybersecurity, and AI infrastructure reinforces hyperscalers' central role in global digital transformation.

Section 4: Charting Hyperscaler Opportunities with PRM

Partner Relationship Management (PRM) platforms have become the connective tissue of cloud ecosystems. As hyperscaler programs evolve and marketplaces mature, PRM enables partners to scale faster, align co-sell activity, and measure real impact across the ecosystem.

1 Leverage Partner Tech for Growth

Partner management platforms streamline partner onboarding, automate workflows, and provide a single view of performance across multi-cloud programs. By integrating with CRM and hyperscaler marketplaces, companies accelerate time-to-value and improve ecosystem-sourced revenue.

Key Benefits

- Automate onboarding and training to reduce ramp-up time.
- Centralize partner data to connect enablement, deal flow, and performance.
- Use analytics to identify top performers and investment opportunities.

2 Optimize Co-Sell & Marketplace Strategy

PRM helps partners operationalize co-sell engagement by syncing data with hyperscaler systems like AWS ACE, Microsoft Partner Center, and Google Cloud Marketplace. This integration supports seamless lead sharing, incentive tracking, and marketplace visibility.

Best Practices

- Connect PRM with hyperscaler APIs for automated co-sell updates (e.g., MACC for Azure, CCA and EDP for AWS).
- Track incentives, MACC – and CCA & EDP – eligible deals, and marketplace listings in one dashboard.
- Use PRM analytics to prioritize high-value partners and optimize resource allocation.

3 Enablement & Differentiation

Technical enablement defines partner success in hyperscaler ecosystems. PRM allows organizations to map certifications, competencies, and skill gaps across their partner base, ensuring they meet hyperscaler tiering and specialization requirements.

Focus Areas

- Centralized tracking for AI, cloud, and security certifications.
- Identify capability gaps for tier advancement and co-sell eligibility.
- Align enablement investment with measurable pipeline growth.

4 Measure What Matters

PRM platforms deliver visibility across partner performance and hyperscaler alignment. Dashboards and analytics help ecosystem leaders track deal velocity, incentive ROI, and the correlation between enablement and revenue growth.

Key KPIs

- **Pipeline Velocity:** Average time from registration to close.
- **Incentive ROI:** Revenue influenced by co-sell and marketplace funding.
- **Certification Impact:** Win rate improvements from specialized partners.
- **Marketplace Metrics:** Listing engagement, private offer volume, and consumption-based revenue.



Marketplace Incentives Explained

Program

Microsoft Azure Consumption Commitment (MACC)

Amazon Web Services, Customer Agreement & Enterprise Discount Program (AWS, CCA & EDP)

Private Offers

Co-Sell Incentives

Solution Listing Tiers

Purpose

Lets customers use pre-committed cloud spend on marketplace solutions, speeding deal closure and driving cloud consumption.

Leverages AWS customer spend commitments to enhance the strategic value of marketplace transactions and co-sell deals, supporting achievement of committed revenue targets.

Custom pricing and contracts created directly in hyperscaler marketplaces for flexible terms and faster procurement.

Joint sales programs rewarding partners for aligned opportunities and shared pipeline engagement.

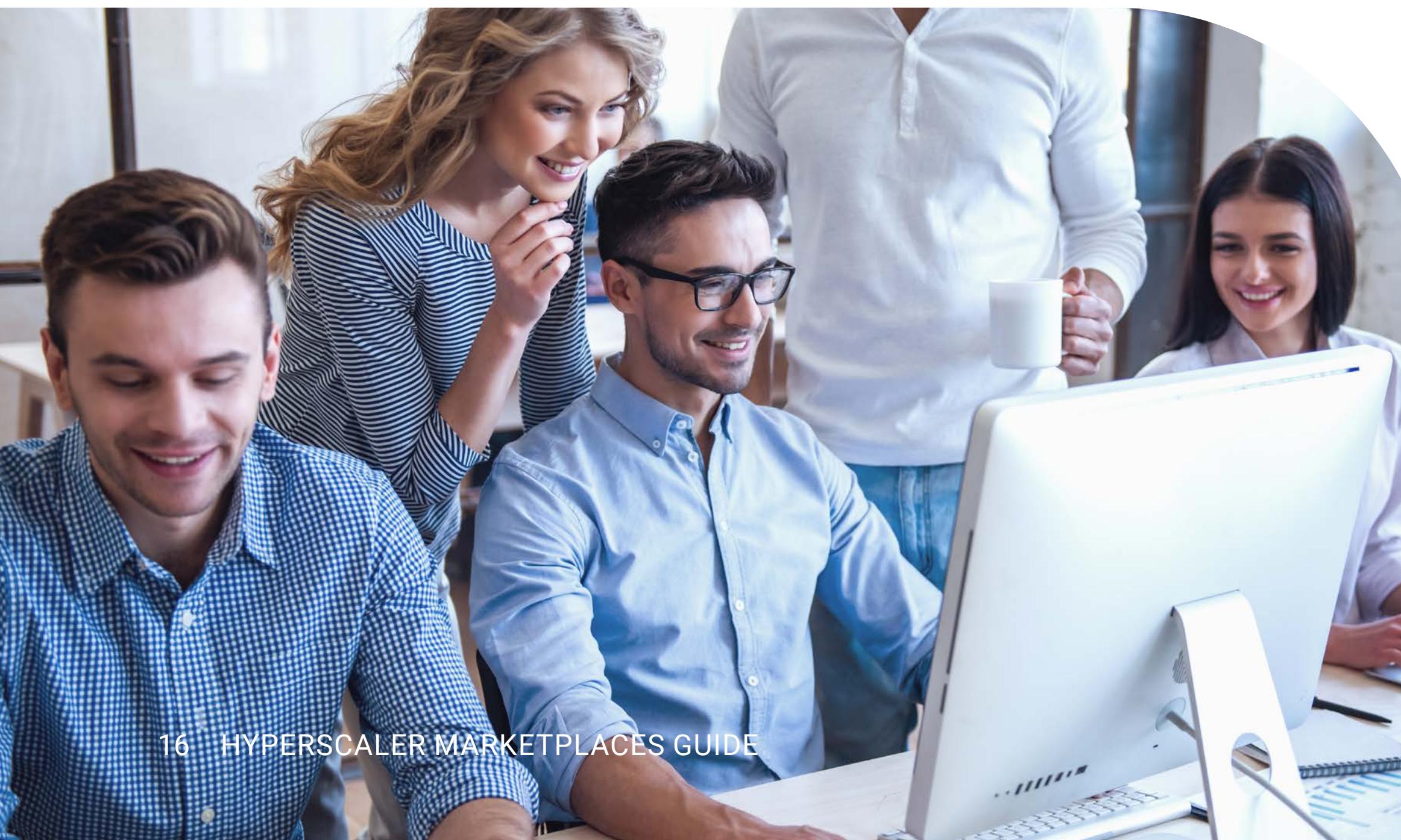
Visibility levels based on partner certification, performance, and engagement maturity.

Marketplace Incentive Strategies

Marketplace incentives are one of the most powerful drivers available to partners and ISVs operating in hyperscaler ecosystems. Incentives guide seller behavior, influence procurement, shape deal structure, and determine how quickly a partner can activate a marketplace revenue at scale.

Understanding how Microsoft Azure, AWS, and Google Cloud structure their incentive programs helps organizations build stronger co-sell alignment, improve deal velocity, and maximize cloud commit capture.

This section outlines customer incentives, partner incentives, and go-to-market incentives across hyperscalers.



A Microsoft Azure

Focuses heavily on increasing cloud consumption and streamlining procurement for enterprise buyers.

Incentive	Benefit	Description
Customer	MACC Alignment	Customers apply pre-committed Azure spend to marketplace purchases, shortening cycles and increasing win rates.
	Private Offer Flexibility	Custom pricing and terms in Azure Marketplace simplify buying and align with customer procurement requirements.
Partner	Co-Sell Incentives	Rewards for partners who influence or drive Azure-aligned pipeline.
	Solution Listing Tiers	Higher visibility, stronger Azure field engagement, eligibility for co-marketing or co-sell programs.
GTM	Co-Sell Ready / Co-Sell Partner Statuses	Allows access to Microsoft sellers compensated when marketplace solutions accelerate cloud consumption.
	Marketplace Rewards Tied To Usage	Incentives increase as customers use purchased solutions, reinforcing long-term adoption.


Amazon Web Services

Emphasizes private offer flexibility, commit drawdown, and partner-led selling models.

Incentive	Benefit	Description
Customer	Marketplace Private Offer Promotions	Eligible customers receive promotional credits when purchasing through private offers.
	CCA & EDP Commit Drawdown	Marketplace deals often count against CCA & EDP commitments, accelerating spend fulfillment and adoption of cloud solutions.
Partner	AWS CPPO	Channel partners resell private offers with enhanced pricing structures.
	Co-Sell Incentives	Rewards for partners who drive AWS-aligned opportunities through ACE, supporting CCA & EDP spend targets.
	Renewal And Multi-Year Incentives	Improved economics for larger or recurring transactions.
GTM	Marketing Concierge And MDF	Joint campaigns and co-funded demand programs drive marketplace adoption.
	Seller Alignment Incentives	AWS field sellers receive credit relief or quota benefit when customers transact via marketplace.


Google Cloud

Prioritizes commit optimization and amplification for partners building data centric and AI aligned solutions.

Incentive	Benefit	Description
Customer	Marketplace Customer Credit Program (MCCP)	Google Cloud credits may be awarded for eligible marketplace transactions.
	Commit Drawdown Optimization	Marketplace purchases can count toward customer commit agreements.
Partner	Private Offer Pricing Structure	Flexible discounts and channel involvement adapted to enterprise needs.
	Variable Revenue Share	Improved economics for large deals, renewals, or priority solution categories.
GTM	Partner Advantage Co-Sell Benefits	Google field sellers support marketplace deals tied to partner solutions.
	Listing Tier Advantages	Higher tiers receive merchandising support and targeted promotional opportunities.

Cross-Cloud Incentives and Accelerators

Certain incentives apply across AWS, Microsoft Azure, and Google Cloud in different forms. These shared opportunity areas continue to shape partner and ISV strategies.

	Accelerator Type	Benefit
Professional Services Listing	Listing Incentives	Partners can list services or implementation packages, increasing average deal size and accelerating customer adoption.
Internal Seller Compensation	Commission / Accelerator	ISVs may pay higher commission on marketplace deals that shorten procurement cycles and reduce internal overhead.
Joint Demand Generation	Co-funded Campaigns / Events	Hyperscalers often co-fund campaigns, workshops, or field events for transactable ISV solutions.
Limited Time Accelerator Programs	Incentive Sprints	Temporary programs with reduced revenue share, bonus credits, or enhanced MDF tied to marketplace growth.

5

Best Practices for Incentive Strategy

- Align to cloud commit programs early:** Work with hyperscaler field teams to identify accounts with active or upcoming commitments. Marketplace deals aligned to these programs close significantly faster.
- Structure partner-led marketplace motions:** Encourage channel partners to participate through CPPO, private offers, or services listings. This broadens reach and accelerates adoption.
- Prioritize incentive eligible opportunities:** Use analytics to flag deals that qualify for marketplace incentives. Incentive aligned deals typically have higher attach rates and faster close times.
- Track incentives end-to-end:** Measure incentive impact through partner tech dashboards. Tie private offer activity, co-sell engagement, marketplace listings, and consumption revenue into a unified reporting model.



| Section 5:

HyperscalerGTM

Overview

Impartner's HyperscalerGTM redefines how ecosystems grow in the cloud era. It is the first unified partner-to-marketplace automation platform connecting partner management, co-sell collaboration, and hyperscaler marketplace transactions.

Built in collaboration with Labra's advanced marketplace connectivity, HyperscalerGTM extends Impartner's industry-leading partner management foundation into hyperscaler commerce. The result is a single automated motion that removes friction from the most time-intensive phase of the sales cycle and ensures every deal is marketplace-ready when buyers are ready to transact.

By automating the channel-specific operational prerequisites for moving ecosystem-driven business into the cloud, HyperscalerGTM unlocks revenue growth, incentives and reduced operating cost by enabling channel cloud revenue at scale.

"With marketplaces projected to reach \$163B by 2030 and 59% of deals partner-funded through private, multi-partner, or distributor offers, **HyperscalerGTM positions Impartner to play a key role in this transformation.**"



Jay McBain
Chief Analyst
Omdia



[Explore the full HyperscalerGTM solution](#)



1 Core Capabilities

Automated Deal Flow

Syncs partner deal registration directly from Impartner or connected CRM into hyperscaler marketplaces. Automatically validates and enriches opportunities for instant co-sell readiness.

Private Offer Automation

Creates, validates, and submits private offers automatically. Automating and streamlining channel process that previously required manual effort and high cost.

Co-Sell Collaboration

Bi-directional sync with AWS ACE and Microsoft Partner Center. Tracks co-sell status, approvals, and required metadata all in one place.

Marketplace Transaction Enablement

Enables native transactions in AWS, Azure, and GCP and ensures deals qualify for MACC, EDP, and CCA commitments.

Automated Listing Creation and Management

Allows ISVs to maintain listings and authorize partners (CPPO) from within a single platform. Ensures entitlement accuracy across marketplaces.

End-to-End Visibility

Revenue, attribution, incentives, and co-sell metrics all feed into Impartner Analytics for a complete view of marketplace impact.

“Every partner can now create a private offer... all in automated processes. This creates significant time and resource savings, enhances market benefits and incentives, and eliminates huge financial and invoicing burden on the ISV.”



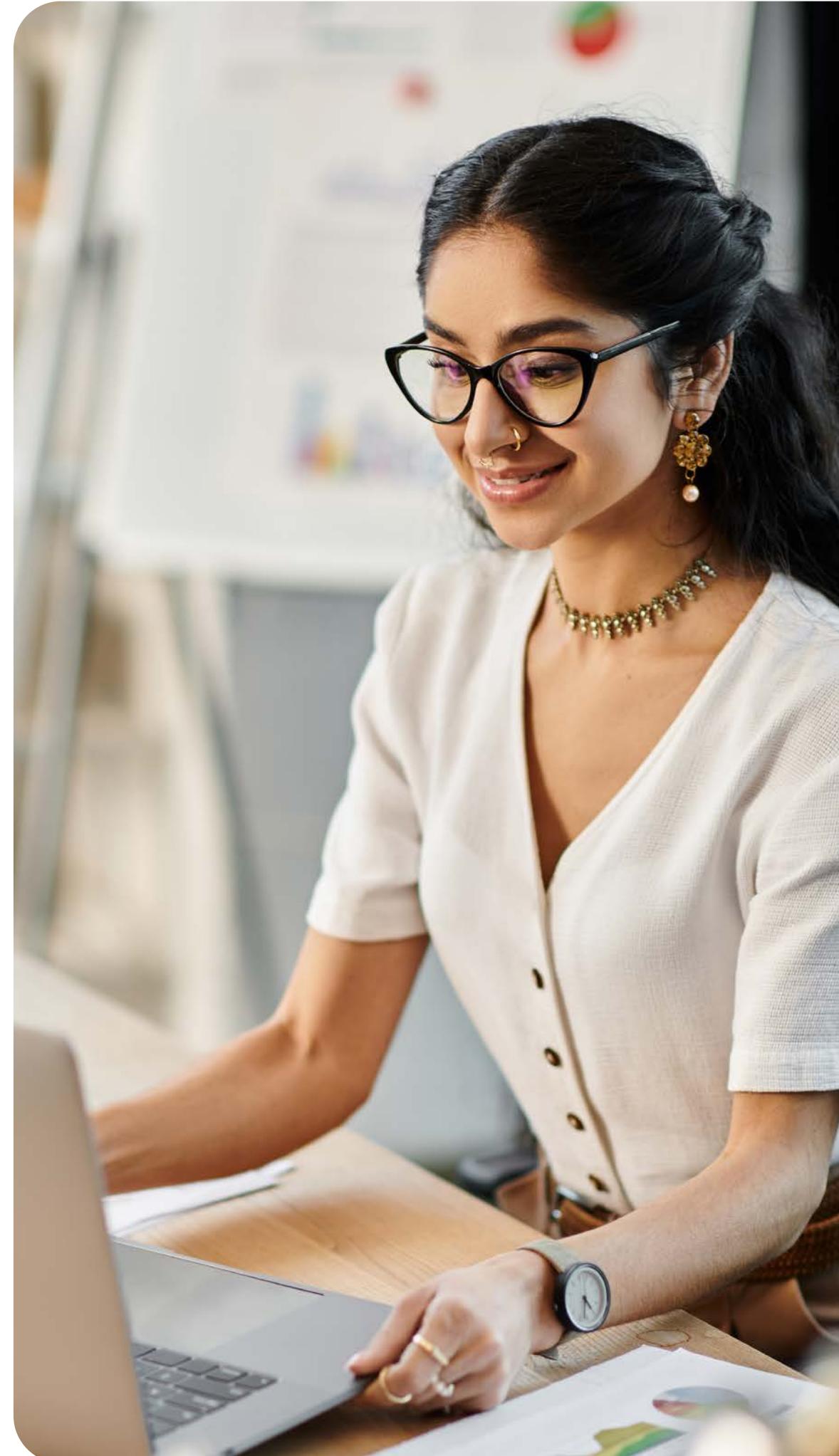
Curtis Brinkerhoff
CRO
Impartner



2 Channel Differentiators

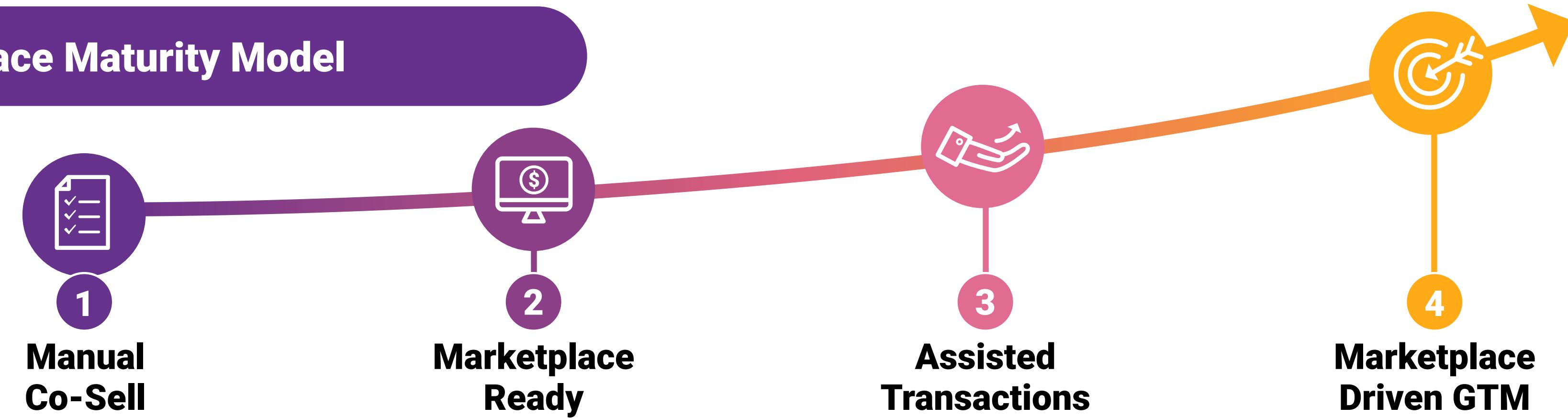
Area	Competitor Limitation	HyperscalerGTM Advantage
Integration	Disconnected partner management, co-sell, and marketplace tools	First-of-its-kind unified connection across PRM, CRM, and all major hyperscalers
Partner-Led Transactions	Direct sales automation breaks in partner-led deal	Purpose-built automation for partner-led marketplace transactions
Transaction Enablement	70%+ of resellers are not credentialled to transact on major marketplaces	Middleware proxy allows partners to transact without credentials
Automation	Manual validation and quoting	Fully automated workflows ensures every deal is marketplace-ready the moment a buyer is ready to purchase
Compliance and Scale	Varies by vendor	Enterprise-grade, SOC 2 Type II, GDPR compliant, used by millions of partners in 80+ countries
Revenue Impact	Slower cycles and missed incentives	10–20% more incentive capture and 28% faster GTM execution

HyperscalerGTM turns every partner into a transacting partner with no setup friction, no deal desk backlog, and no lost opportunity.



3 Partner-to-Marketplace Maturity Model

This model reflects how ISVs evolve their hyperscaler route-to-market from manual, direct-led transactions to scalable, partner-driven marketplace revenue.



Description	1 Manual Co-Sell	2 Marketplace Ready	3 Assisted Transactions	4 Marketplace Driven GTM
Challenge	Partners share spreadsheets and manually sync data with hyperscaler portals.	ISVs have listings, but partner participation is limited.	Partial automation of private offers and deal desk flows.	Marketplaces become primary route to revenue, with partner-led transactions operating at scale.
Automation Level	None	Low	Medium	Full
With Hyperscaler GTM	Automates validation, syncing, and co-sell registration.	Enables partner-led transactions via Impartner middleware.	Removes credential dependency and significantly accelerates transaction completion.	Drives automated, scalable partner-led revenue with built-in channel attribution and cloud revenue intelligence aligned to hyperscaler incentives.

4 Strategic Impact

For Partner Leaders

- Turn the partner programs into revenue engines.
- Remove deal desk bottlenecks and manual validation.
- Expand partner-led marketplace transactions with no added operational overhead.

For ISVs and SaaS Vendors

- Automatically access hyperscaler incentive programs (MACC, EDP, CCA).
- Shorten procurement cycles from months to weeks.
- Increase marketplace revenue and accelerate co-sell velocity.

For Hyperscalers

- Simplifies partner alignment and marketplace enablement.
- Expands eligible listings under enterprise commitment spend.
- Strengthens ecosystem collaboration and accelerates consumption growth.

For Businesses

- Achieves over 28% faster time to market.
- Captures 10 – 20% more hyperscaler incentives.
- Reduces cycle time from registration to transaction by up to 50%.
- Gain unified visibility across clouds, partners, and deals.

Marketplace channel transactions represent the fastest-growing segment of hyperscaler revenue. With channel participation expected to more than triple, automation becomes a strategic imperative for ISVs, vendors, and distributors.

“By bringing the entire process into one fluid motion across the ISV, partner, and hyperscaler, it becomes far more than automation; it becomes intelligence powered by data with integrity across the full acquisition and fulfillment lifecycle. That level of visibility unlocks a tsunami of potential, from M365 integrations to AWS AI agents to private data models and agentic solutions.”



Curtis Brinkerhoff
CRO
Impartner



Section 6: Recommendations & Next Steps

Hyperscaler marketplaces are entering a new stage where they influence budget allocation, cloud consumption, and partner visibility.

Enterprise buyers are shifting more spend into marketplaces to accelerate AI adoption and streamline procurement, while hyperscalers raise the bar on co sell readiness and reward partners that drive measurable consumption. Success now depends on operationalizing the marketplace as a primary catalyst for growth and building capabilities aligned to AI-driven demand, consumption-based economics, and multi cloud buying patterns.

- 1 Immediate opportunities:** driving partner impact now
- 2 Strategic growth moves:** aligning for market evolution
- 3 Future-proofing the ecosystem:** leading the next wave

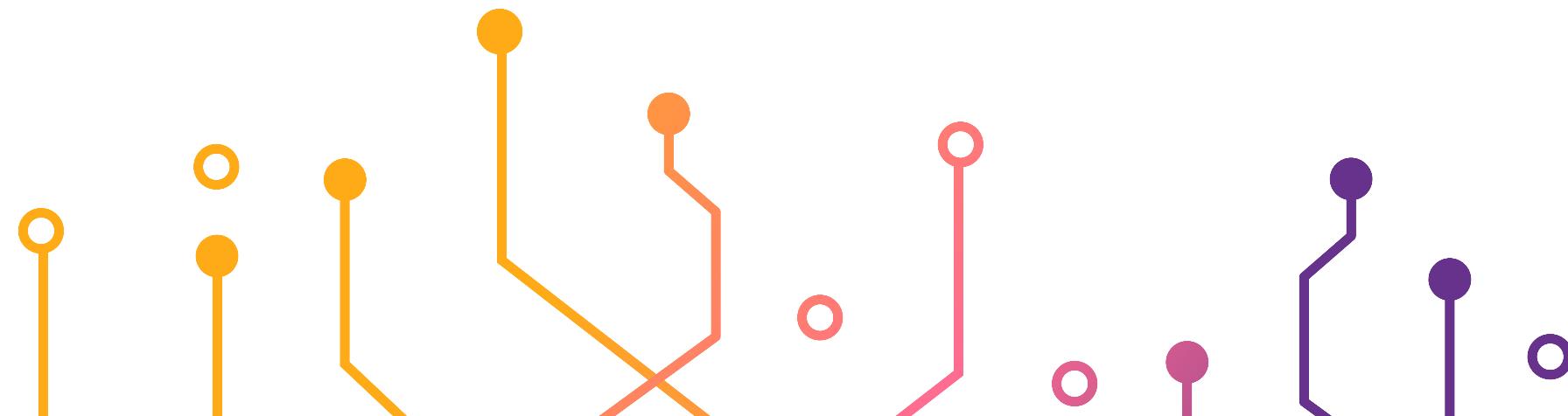
1

Immediate Opportunities

Driving Partner Impact Now

Partners can create meaningful impact today by acting on the near-term trends reshaping hyperscaler ecosystems. Marketplaces are progressing rapidly into intelligence-led platforms where co-sell activity, usage insights, and data signals influence visibility and performance.

- Focus on AI-enabled offerings.** Prioritize embedding AI capabilities in products and services to increase marketplace visibility and drive co-sell alignment, rather than simply labeling existing solutions as AI.
- Advance hybrid and multi-cloud adoption.** Invest in interoperable systems and edge capabilities early to support diverse workloads and accelerate partner impact.
- Streamline PRM and engagement processes.** Implement secure, transparent data-sharing frameworks and standardized attribution to enable incentives and enhance co-sell effectiveness.
- Enhance technical readiness.** Provide targeted training on hyperscaler platforms, AI solutions, and consumption-based models to ensure partners can respond quickly to emerging opportunities.



2 Strategic Growth Moves

Aligning for Market Evolution

For sustained growth, partners should move from reactive participation to building repeatable, measurable GTM strategies that differentiate them in the hyperscaler ecosystems.

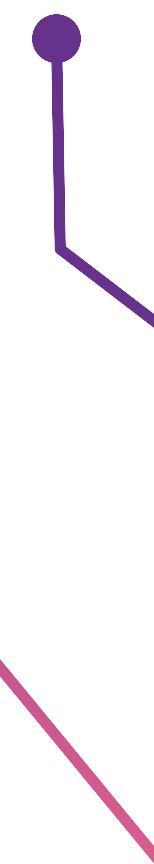
- Refine GTM and co-sell approaches.** Use AI-driven insights for account mapping, opportunity routing, and co-sell orchestration to better align with hyperscaler field teams.
- Develop vertical specialization and domain expertise.** Focus on industry-specific solutions, packaged IP, and compliance capabilities to stand out as trusted advisors rather than commodity vendors.
- Prepare for mid-term technology shifts.** Anticipate changes in multi-cloud adoption, edge computing, and AI-driven partner behaviors; design modular, platform-agnostic solutions to stay relevant.
- Leverage marketplace incentives intelligently.** Connect partner data systems to hyperscaler marketplaces to accelerate deals, surface opportunities automatically, and optimize financial returns.

3 Future-Proofing the Ecosystem

Leading the Next Wave

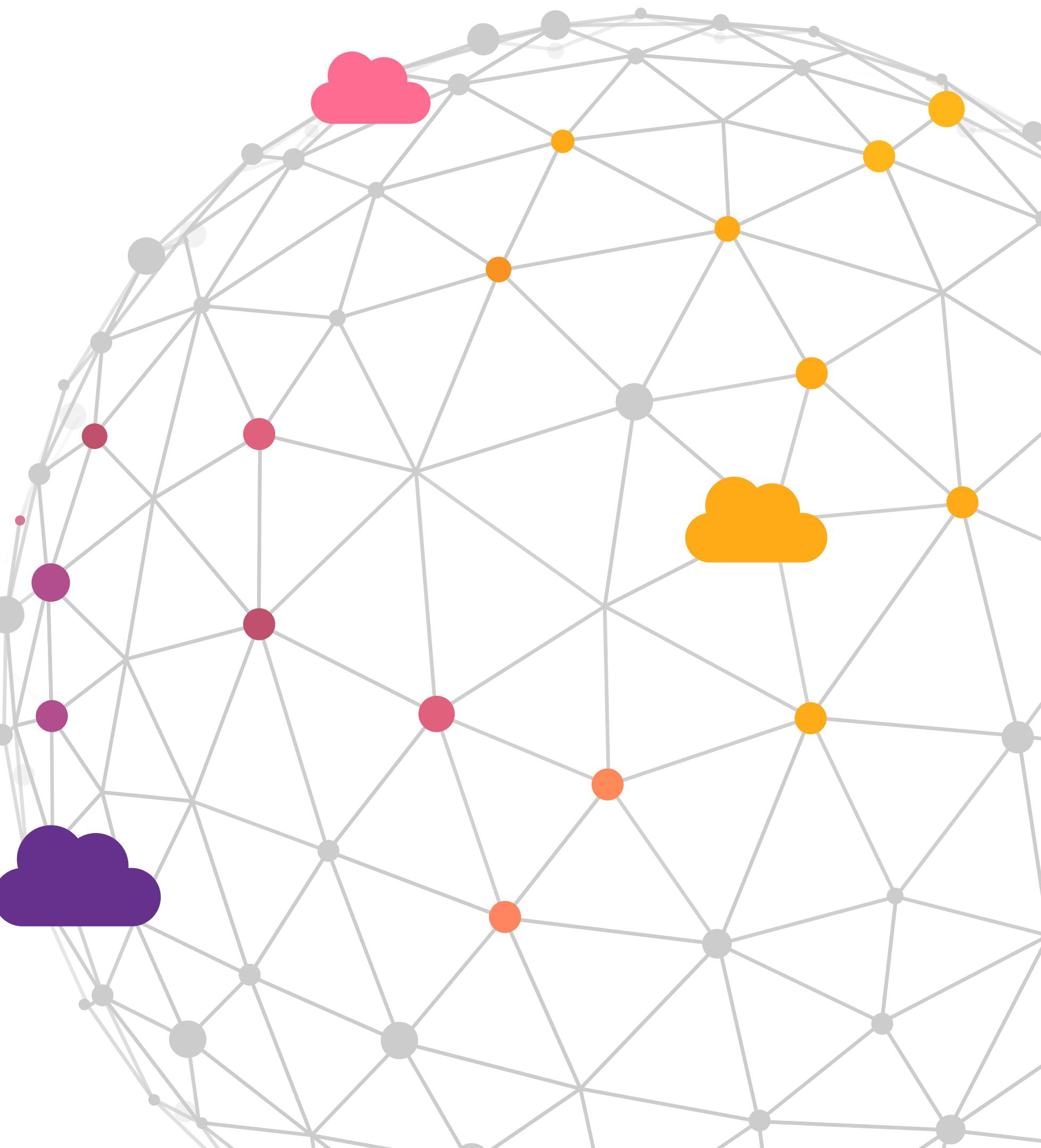
Continuous success depends on building resilient, innovation-aligned strategies that adapt to hyperscaler advances, regulations, and sustainability priorities.

- Plan for hyperscaler and regulatory shifts.** Prepare for changes in AI infrastructure, compliance frameworks, and sustainability requirements while delivering specialized, high-value services.
- Invest in automation and data-driven operations.** Use integrated partner technology systems, automated workflows, clean data, and performance dashboards to scale co-sell efficiency and ecosystem impact.
- Build long-term differentiation.** Strengthen leadership in AI, multi-cloud orchestration, verticalized offerings, and advanced services that materially influence hyperscaler revenue.
- Deepen trust and transparency.** Treat shared data and secure collaboration as foundational elements of ecosystem success, enabling confident, repeatable co-sell motions.



Appendix: Additional Tools and Resources

- The investment opportunity in cloud ecosystems | McKinsey
- Hyperscaler market leaders – statistics & facts | Statista
- Partner Ecosystems Playing a Central Role in Business Growth and Innovation | KPMG
- Hyperscale Cloud Market Size, Forecast Report [2032] | Fortune Business Insights
- Canalys Channels Ecosystem Landscape 2025 | Omdia, formerly Canalys
- Channel partner investment in cloud hyperscalers: a strategic pivot point | Omdia
- Hyperscalers: What Are They, Examples, & Benefits | Britannica Money
- HyperscalerGTM | Impartner
- Hyperscaler cloud marketplace sales to hit \$163 billion by 2030 | Omdia
- Global Cloud Market Share Q3 2025: AWS Lower, Microsoft And Google Stay Same | CRN
- Now and Next for Hyperscaler Marketplaces | Omdia
- Now and Next for Hyperscaler Marketplaces | Canalys
- Hyperscale Data Center Market Size, Share and Global Market Forecast to 2030 | MarketsandMarkets
- Cloud Marketplace Stats You Need to Know for 2025 | Invisory



Contributors



Gina Bassile

Director – Channel Strategy
and Alliances
Maritz

Gina Bassile is the Director, Channel Strategy and Alliances at Maritz, a leading company specializing in loyalty and incentive marketing. Maritz helps brands build lasting loyalty with their channel partners through data-driven program design, communication and engagement strategies, and a wide range of rewards—all powered by a robust incentive management platform. Gina's expertise lies in helping clients design and optimize channel incentive programs. She also leads the development of Maritz's channel partnerships and alliances. With over 20 years of experience in the incentive industry, Gina brings a strong background in marketing strategy, channel technology, and SaaS.



Curtis Brinkerhoff

Chief Revenue Officer
Impartner

Curtis Brinkerhoff boasts a remarkable career spanning over two decades in the technology sector. His journey in the industry has seen him don pivotal roles such as Sales Director, VP, EVP, COO, and CRO, and led companies from \$3M to over \$100M in annual revenue. Throughout his tenure, he has not only spearheaded sales but has also led dynamic support, customer service, and marketing teams, showcasing his diverse business acumen and innovative problem-solving approach.

This experience, combined with his commitment to innovation and excellence, positions Curtis uniquely in serving Impartner's market needs with utmost professionalism. He emphasizes bringing best-in-class solutions to the heart of the partnerships industry.



IMPARTNER



Contributors



Neeti Gupta

PhD candidate
Founder & CEO
AI Partnerships

I'm currently pursuing a PhD at the University of Cambridge, where my research focuses on AI partnerships, ecosystem strategy, and platform dynamics. As the Founder and CEO of AI Partnerships, I bring over two decades of experience in business development, strategic alliances, and go-to-market leadership across top technology companies. My work combines design thinking, data analytics, and user-centered strategy to build scalable, high-impact AI partnership initiatives. I've led critical negotiations including VMware's security co-pilot agreement with Microsoft and their Azure Marketplace rollout across US and global markets. I'm driven by a deep interest in how AI reshapes organizational decision-making, value creation, and industry ecosystems, and I use my academic and industry experience to bridge theory with practice at the frontier of AI transformation.



Rebecca Jones

Chief Growth Officer & Partner
Bridge Partners

Rebecca Jones is a growth executive known for combining strategic vision with disciplined execution to help companies scale with clarity and confidence. She architects growth engines that combine AI innovation, go-to-market strategy, and partner ecosystems to help companies scale smarter. With two decades in technology and professional services, she has driven transformative growth for global tech and telecom leaders across marketing, product, and partner organizations. At Bridge Partners, she leads services and solutions innovation, ecosystem expansion, and full lifecycle engagement. She brings a distinctive perspective grounded in strategic clarity, operational excellence, and ecosystem-driven growth.



Contributors

**Matt Karst**

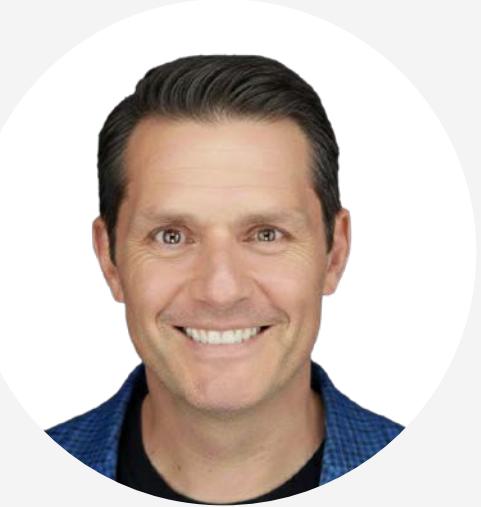
VP New Vendor Acquisition
TD SYNNEX

Matt Karst is a technology industry veteran for over 35+ years whose career includes working in many aspects of the supply chain including vendor, VAR, ISV, wireless carrier, satellite broadcast carrier, emerging tech cloud start up, and distributor. Matt currently serves as TD SYNNEX's Vice President – New Vendor Acquisition in North America. His team is responsible for engaging with new vendors to the TD SYNNEX ecosystem and developing a winning GTM strategy for growth. Prior to the TD SYNNEX acquisition of Westcon in Sept 2017, Matt was the Senior Director – Cloud for Westcon Comstor in North America. Prior to TD SYNNEX, Matt was DISH Network's VP of Alliance Management and National Accounts.

Before joining DISH Network, Matt served as VP of Sales for Centennial Wireless (acquired by AT&T) and has led successful sales organizations in the wireless telecom industry and the hardware/software industry, including a start-up internet company funded by ICG (Internet Capital Group). Matt started his career with numerous sales and management positions with IBM in the Southeast Region. Matt graduated Magna Cum Laude from the University of Miami (FL).



Contributors



Jay McBain
Chief Analyst
Omdia

Jay McBain is one of the most visible and respected thought leaders in the global channel ecosystem. Named Global Channel Influencer of the Year by Channel Futures Magazine, Top 40 Under Forty by the Business Review, as well as numerous channel magazines' top thought leadership lists, he is often sought out for industry guidance and future trends. He is the most popular global speaker at major channel events about big shifts in the partner ecosystem.

He has spent his 31-year career in various executive channel sales, marketing, and strategy roles within IBM, Lenovo, Autotask, ChannelEyes, and Forrester. Jay grew up in Canada and currently lives in Florida. He holds a bachelor's degree in management information systems from the University of Lethbridge and an MBA in entrepreneurship from Louisiana State University.



Bob Moore
Co-Founder and CEO
Crossbeam

Bob Moore is Co-Founder and CEO of Crossbeam, an Ecosystem-Led Growth (ELG) platform that helps companies use their partner ecosystems to generate leads, close deals, and grow faster. Moore previously co-founded Stitch (Acquired by Talend in 2018) and RJMetrics (acquired by Adobe by way of Magento Commerce in 2016). He is the National Bestselling author of Ecosystem-Led Growth.

Bob serves as a Trustee of The Franklin Institute, and has previously served as the Board Chair of Philly Startup Leaders and Board Member of Philadelphia Alliance for Capital and Technologies (PACT).

Outside of work, Bob is an improv comedy performer, where he has performed over 100 shows as a member of the Philadelphia-based improv team Big Baby.

Contributors



Michelle Morgan

Director of Partnerships
TiER1 Performance

Michelle Morgan is the Director of Partnerships at TiER1 Performance. TiER1 Performance focuses on helping companies fuel transformation by supporting strategy definition, organizational alignment, people engagement and plan implementation. When it comes to the tech stack, Michelle and the team at TiER1 support their customers in identifying the most effective and efficient ways to leverage infrastructure – people, processes, technology, and data – to drive strategy, allowing teams to focus on the inherently human aspects of their work. With 15 years of experience in partnerships, including her time at National Instruments as an Impartner customer, Michelle is passionate about fostering relationships built on mutual success.

Beyond her work in partnerships, Michelle is a dedicated health and fitness enthusiast and a Certified Personal Trainer. She embraces Colorado's outdoor lifestyle, enjoying adventures alongside her husband and three young boys.



Nancy Ridge

President & Founder
Ridge Innovative

Nancy Ridge is the President and Founder of Ridge Innovative and a respected thought leader in the technology channel ecosystem. Having led from all sides of the industry, she sets the company's culture, vision, strategy, and business direction. Her leadership is rooted in core values including relationships, creativity, innovation, accountability, gratitude, and love. Guided by her motto, "Be Curious," Nancy is passionate about delivering exceptional business outcomes for clients through technology strategy, project management, and cost optimization.

Previously, Nancy built the partner program for a leading national technology services broker and led sales for a high-touch wholesale carrier, where she created and managed the indirect sales channel. During her tenure, the company earned a #41 ranking on the Inc. 500 list with over 2,000% growth. Nancy is the co-founder and past president of the Alliance of Channel Women, a certified WBENC, serves on the boards of three nonprofits, and is an enthusiastic mentor to women and girls in her workplace and community.

Contributors



Juhi Saha
CEO
Partner1

Juhi is an award-winning business leader with a track record of founding multimillion dollar partner businesses and leading transformative projects. She is CEO of Partner1, the trusted partner ecosystem advisor for B2B SaaS and Services companies, and one of only five partner-led networks globally, recognized by Microsoft for their impact in helping Microsoft partners scale successfully. As Global Director at Microsoft, she launched Pegasus, Microsoft's flagship program for scaling VC-backed startups, and developed key fintech partnerships. As VP of Partnerships at Clearbit, she generated significant revenue and was instrumental in its acquisition by HubSpot. Juhi also brought her expertise to executive roles at Intel and Qualcomm, covering operations and product development. She currently advises and sits on the boards of fast-growing companies. She has an M.B.A. and B.S. in Electrical Engineering and Computer Science from the University of California at Berkeley, and an M.S. in Electrical and Computer Engineering from the University of California at San Diego.



Kristine Stewart
Senior Partner Evangelist
Spur Reply

Kristine is a partner ecosystem evangelist at Spur Reply and a recognized thought leader in partner strategy and success. With deep expertise in the evolving needs of channel-focused companies, she helps clients transform their go-to-market strategies to adapt to modern business environments, including supporting recurring revenue models and optimizing partner roles as brand and sales extensions. An experienced IT industry veteran, Kristine has held executive leadership roles across sales, channels, business development, and marketing at Cisco, Western Digital, Hitachi, and SMC. She holds a bachelor's degree in business administration from Pepperdine University and enjoys travel, golf, photography, and hiking Colorado's mountains.





IMPARTNER

Cloud marketplaces are rapidly redefining how organizations engage with hyperscalers, creating a new environment where digital procurement, shared insights, and automated coordination shape the path to growth. This guide has outlined the shifts taking place across these ecosystems and highlighted the practices that enable partners to thrive as cloud commitments expand and buying patterns change.

Impartner's HyperscalerGTM equips teams with an integrated structure for managing marketplace activity, aligning with co-sell programs, and maintaining accurate operational data from start to finish. By consolidating these motions into a unified framework, partners can gain headway, shorten cycles, and strengthen their position within hyperscaler ecosystems as demand rises.

As cloud platforms evolve and intelligent systems influence how solutions are delivered, the greatest momentum will emerge for organizations who turn strategy into measurable execution.

It's time to turn opportunity into outcomes. The next stage of hyperscaler growth is ready to be built. We're here to help you transform potential into progress and success.

To learn more visit: impartner.com/hyperscalergtm

