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Hyperscaler marketplaces: a fast-growing model for software procurement

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Sales through hyperscaler marketplaces to hit $163 billion by 2030

Commit burndown, financial benefits and improved simplicity are fueling customer adoption of cloud marketplaces as a procurement motion

Enterprise customer spending on global hyperscaler marketplace spend is projected by Omdia to grow from US$45.5 billion in 2025 to US$163.1 billion by 2030, a five year CAGR of 29.1%. Enterprises are increasingly choosing to use AWS Marketplace, Microsoft Marketplace and Google Cloud Marketplace to purchase their preferred software and cybersecurity products, taking advantage of the ability to burn down a portion of their committed cloud spend with the hyperscalers, along with other benefits such as access to additional cloud credits, consolidated billing and financing.

“44% of enterprise customers surveyed by Omdia plan to increase or start using hyperscaler marketplaces in the next 18 months.”

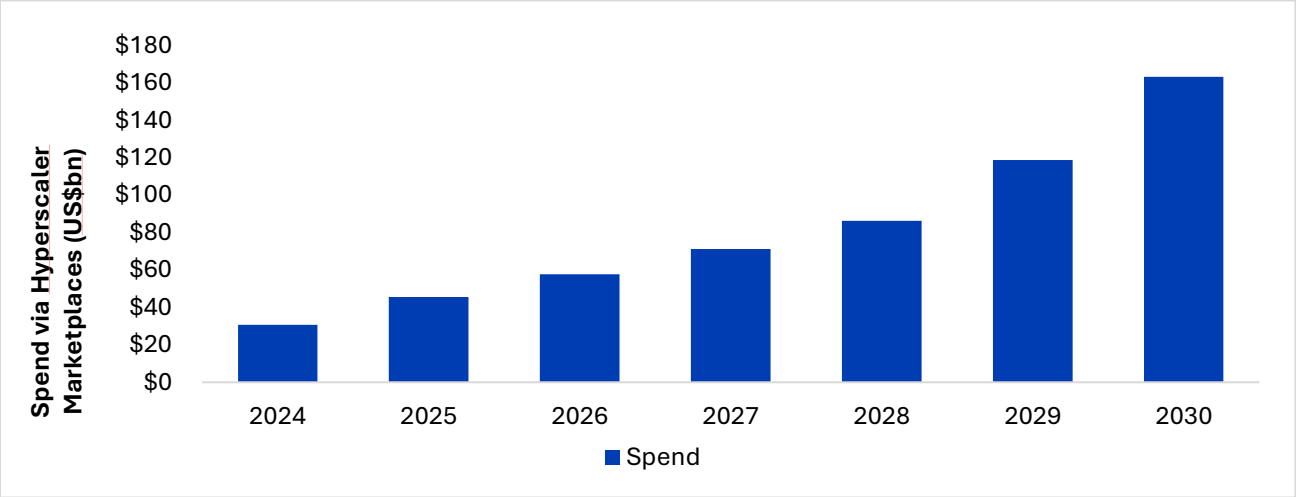
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At the same time, more and more ISVs are making their products available to buy through these marketplaces, recognizing the value to customers and helped by hyperscalers' programs to support customer adoption. Those can include co-sell activities, multiparty solutions and AI tools to improve discovery, try-before-you-buy, accelerated deployment, adoption and analytics. As the hyperscalers battle for marketplace dominance, they are providing lucrative financial benefits, which can add up to significant customer savings, even with the inclusion of marketplace fees. All three hyperscalers are also developing programs to support channel partners and distribution delivering customized private offers for end-customers.

An increasingly broad spectrum of technologies will be transacted through marketplaces. Four categories currently represent 81% of marketplace spend: Infrastructure Software, DevOps, Business Applications and Cybersecurity. With the rise of agentic AI, cloud marketplaces will also become an important route to market as a plethora of new agents are built and sold on the hyperscalers' cloud platforms.

Figure 1: Forecasted customer spend via hyperscaler marketplaces



Source: Omdia

Customer uncertainty and misinformation can lead to resistance

Despite the benefits offered by marketplaces, customer adoption can vary significantly. The prevalence of common myths surrounding hyperscaler marketplaces can fuel resistance. Typical concerns include fears about higher costs of marketplace purchases, perceptions of higher complexity, and worries about an over-dependence on the largest public cloud providers in procurement models.

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Omdia addressed these concerns in a webinar with Red Hat, and sought to debunk some of the most common misconceptions. The webinar focused on:

- How marketplace purchasing can lead to more flexible budget allocation, through the ability to use marketplace purchases as a way to 'burn down' cloud spending commitments with the different hyperscalers.
- The availability of better discounting through private offers, combined with significant potential financial benefits.
- The advantages of consolidated billing and simplified procurement (increasingly supported by new AI tools and multi-product solutions).
- Flexible purchasing and payment models, aligned to the customer's individual needs.
- The ability to leverage multiple marketplaces, and combine with off-line purchasing.
- The increasing role of channel partners and distributors in enabling, simplifying and managing marketplace procurement.

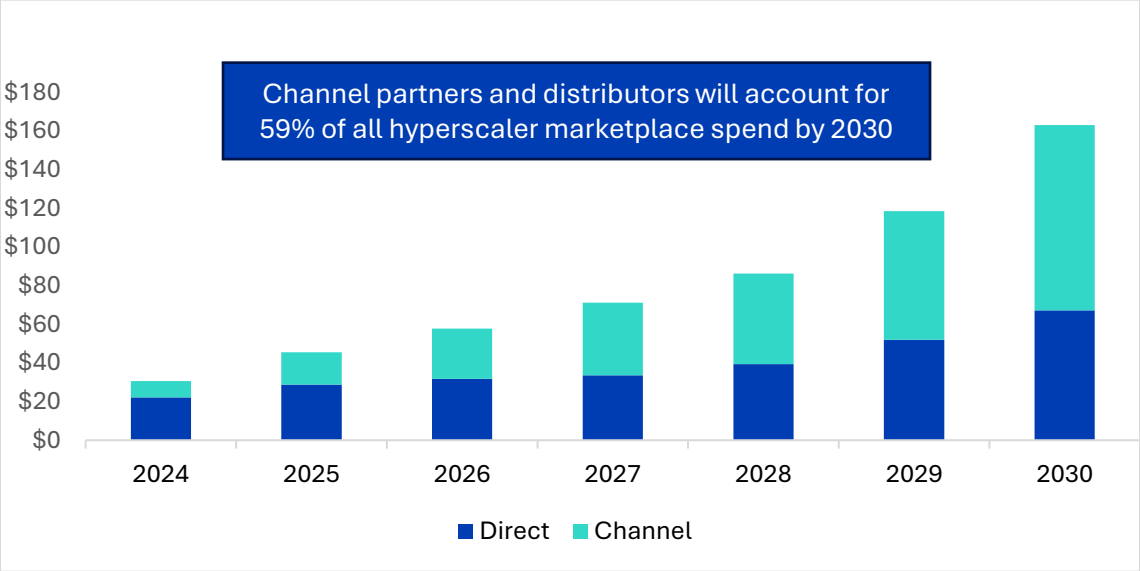
Channel partners and distributors will play a more critical role

Channel partners are already playing a greater role in helping enterprise customers purchase third party products and services through the hyperscalers' marketplaces. Many customers prefer to buy through a trusted channel partner or systems integrator. They help with product discovery, technical expertise, and price negotiation with the vendor, as well as providing valuable services such as managed and professional services.

Through programs like Channel Partner Private Offers and Designated Seller of Record (DSOR) from AWS, Microsoft's Multiparty Private Offers (MPO) and newly launched Resell Enabled Offers (REO) and Google Cloud Marketplace Channel Private Offers (MCPO), all three hyperscalers allow end-customers to purchase through their preferred partners. Via these programs, partners can create customized and localized marketplace offers for their customers.

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Figure 2: Share of channel spend via hyperscaler cloud marketplaces



Source: Omdia

“Omdia expects this partner-driven model to become the dominant motion in future, with 60% of all marketplace purchases delivered through channel partners by 2030.”

As multi-cloud adoption grows, partners also help customers to manage the complexity of using different hyperscaler marketplaces for access to different technology products, as well as managing multiple spending commitments, which can have different rules about how and where those commitments can be applied to marketplaces. The future will see much greater integration between hyperscalers’ marketplaces and those of distributors and channel partners, creating a more seamless digital experience for the customer.

Understanding marketplace benefits will be key to successful future procurement strategies

The rise of hyperscaler marketplaces highlights the critical role of customer procurement teams to ensure marketplaces are a core tenet of modern, agile and cost-effective IT

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sourcing strategies. Many customers continue to approach hyperscaler marketplaces tactically and opportunistically, but they can play a more strategic role as organizations become more digital, cloud and AI-led. Procurement teams must ensure they are educating themselves on the benefits that this model brings, but also informing the wider business, including lines of business, about how hyperscaler marketplaces can be leveraged. It's also critical to understand the potential pitfalls and challenges, which can include tax and pricing implications, the risk of changes to hyperscaler terms, and significant geographic variations in terms of how marketplaces can be used for sourcing.

Procurement leaders should focus on three key priorities when it comes to marketplaces:

1. Ensure hyperscaler marketplaces purchasing is a central strategy in procurement, not an afterthought.
2. Educate the wider business on the implications of using hyperscaler marketplaces, including cloud commit burn down as a way to help the business meet its cloud spending commitments.
3. Understand the different hyperscaler marketplace strategies of your preferred vendors; this can vary significantly according to the vendor's own cloud strategy and go-to-market models.

> **"More and more ISVs are making their products available to buy through these marketplaces, recognizing the value to customers and helped by hyperscalers' programs to support customer adoption."**
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> Alastair Edwards, Chief Analyst, Omdia

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Appendix

Methodology

Omdia research includes data from a range of workplace transformation studies, decision-maker surveys, plus extensive expertise in workplace transformation.

Omdia consulting

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We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help your company identify future trends and opportunities.

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