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2025 STATE OF cloud gtm REPORT

Executive Summary

B2B software companies expect that 2026 will see a 60% increase in cloud marketplace revenue over 2025. Clearly, cloud marketplaces are rapidly evolving from supplementary sales channels to primary revenue drivers for B2B software companies.

Our annual survey reveals a dramatic shift in marketplace strategy, with organizations projecting their marketplace revenue share will surge from 20% over the past 12 months to 32% in the coming year. That's a big shift from one in five dollars to nearly one in three dollars. Everything indicates that Cloud GTM is becoming essential to cloud-based B2B software organizations.

This transformation extends beyond revenue. Co-selling partnerships are deepening alongside marketplace adoption, with cloud partner-influenced pipeline jumping from 22% to an expected 30% next year. Companies are backing this strategic pivot with significant resource allocation, planning to expand their cloud go-to-market teams by 37% on average (from 11 to just over 15 full-time employees).

AWS maintains its dominant position with 89% of respondents partnering with them. 58% of respondents leverage Microsoft, and 17% plan to in the next 12 months. Google Cloud shows the strongest growth momentum, with 28% of companies planning new listings in 2026.

The top benefits of marketplace adoption? Access to committed cloud spend. The biggest challenge? Cloud provider engagement. Read on for more insights in this latest installment of The 2025 State of Cloud GTM.

INTRODUCTION

Our sixth annual report remains unique in its focus on Cloud Go-to-Market (Cloud GTM). For those who are new to Cloud GTM, it's a business strategy that enables ISVs to unlock new revenue streams and generate revenue faster by partnering with the clouds.

Tackle coined the term Cloud GTM to describe the emerging go-to-market strategy that leverages cloud provider partnerships and technologies to grow revenue. This data-driven strategy relies on cloud marketplaces as well as co-selling with cloud partners.

However, Cloud GTM is much more than a partnership strategy. It's a new way of doing business and unlocking new revenue opportunities. With a Cloud GTM strategy, your team can:

Access buyers' pre-committed cloud spend.
According to Canalys, cloud commitments are over $460B in 2025. The opportunity for ISVs to tap into this spend on marketplaces is enormous.

Accelerate deal velocity.
When the budget is already allocated and your sellers are aligned with their cloud provider counterparts, deals move 40% faster.

Access to cloud partner incentives.
The public cloud providers have an increased focus on consolidating customer procurement through marketplaces. They are offering valuable incentives to ISVs to encourage them to transact more business through their marketplaces.

For example, AWS' Marketplace List and Sell, Microsoft's Marketplace Rewards Program, and Google Cloud's New Customer Rebates.

THANK YOU!

We deeply appreciate the contributions of our industry experts. Our gratitude goes out to the leaders who shared their insights, the Cloud GTM thought leaders who have helped amplify this report's findings, and our customers who continue to grow and innovate alongside us.

WELCOME TO TACKLE'S 2025 STATE OF CLOUD GO-TO-MARKET REPORT

This report helps you gain a deeper understanding of the people, companies, processes, and technologies shaping Cloud GTM.

More than 10,000 partner and revenue leaders read this report every year, and many have told us they use it to inform their Cloud GTM strategies, leveraging the findings and data as a foundation for their implementation roadmaps. We're grateful for that feedback—and always open to more—and have tailored this year's report with those insights in mind.

In this year's report, we'll present key learnings such as:

1. **Nearly a third of revenue will transact via marketplace next year.**
2. **Co-selling with multiple clouds is the name of the game.**
3. **Market intelligence data helps Cloud GTM scale.**
4. **Multi-cloud companies see 10x more revenue from clouds.**
5. **Committed spend is the most bankable benefit.**
6. **Provider engagement is the choke point.**
7. **Channel partners are becoming increasingly common in marketplace transactions.**

As well as some predictions to keep in mind as we head into 2026:

1. **The next $100B won't come from "just more ISVs."**
2. **Co-sell will only scale with agents.**
3. **Data is the key to unlocking Cloud GTM participation.**
4. **AI is the forcing function that finally makes PLG real.**
5. **Storefronts proliferate and federate into "buy anywhere"**
6. **GTM becomes a primary cloud selection lever.**

Methodology

This is Tackle's sixth annual State of Cloud GTM report. With over five years of data and by processing more than $1B a month in cloud transactions, we can see how strategies shift—sometimes in big ways from year to year.

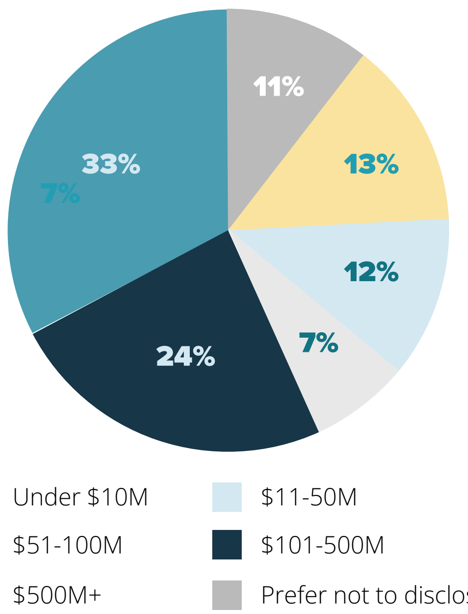
In the summer of 2025, Tackle surveyed many individuals who participated in Cloud GTM in some capacity. We asked these individuals to share their unique perspectives, experiences, successes, and challenges. Respondents are involved in cloud marketplace selling, cloud provider co-selling, or both.

As in previous years, most (75%) of these individuals identify in the Cloud Alliances and Channel/Partner Management functions. 43% of the respondents are decision makers. The survey data was augmented by individuals in Product, Engineering, Sales/Revenue, and Operations.

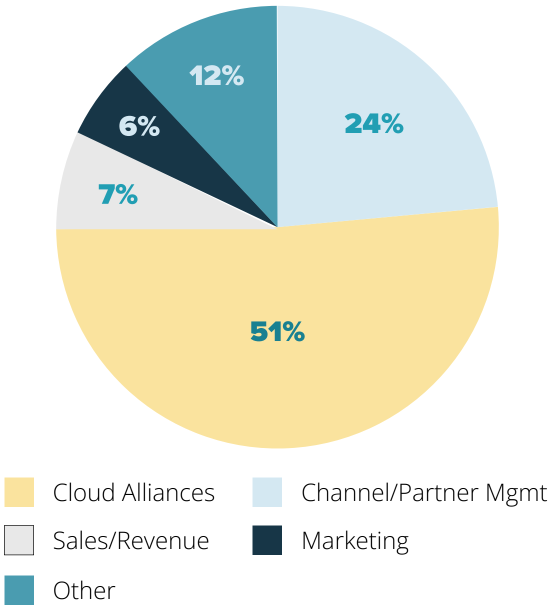
Organizations ranged in size from 5,001 and over (20%), 1,001-5,000 (27%), 201-1,000 (30%), and under 200 (23%). Over half the companies (57%) have revenues over $101M.

We normalized data for accuracy, used consistent 1–5 Likert ratings, and included sample sizes for transparency. Quality checks ensured reliable, data-driven insights.

2025 SURVEY PARTICIPANTS BY COMPANY ARR



2025 SURVEY PARTICIPANTS BY JOB FUNCTION



Survey Results & Takeaways

01 LEARNING 1: NEARLY A THIRD OF REVENUE WILL TRANSACT VIA MARKETPLACE NEXT YEAR.

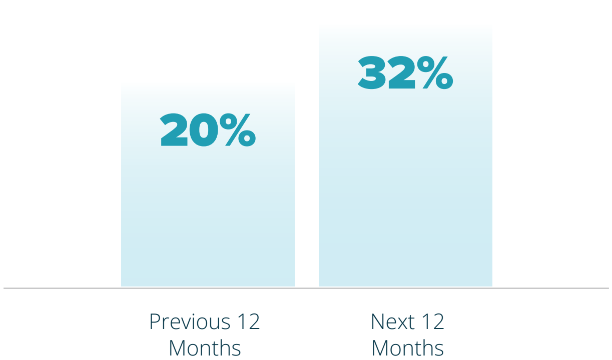
The respondents to our survey do not treat Cloud GTM like a one-off project. 40% of the executive sponsors are CROs (Chief Revenue Officers), followed by members of the Partner or Channel team at 28%. Cloud GTM teams are poised for significant growth next year, with 52% of respondents expecting to hire more FTEs next year. This includes people in alliances, partner sales, co-sellers, and partner marketing. On average, respondents anticipate a 37% increase in full-time employee headcount. Multi-cloud teams are already leading the way in expansion.

Cloud marketplaces are no longer just a niche fulfillment channel; they are becoming a critical component of overall revenue strategies. We asked participants what percentage of their total annual revenue they transacted through cloud marketplaces in the last 12 months, as well as their prediction for the next 12 months. The results were striking: participants expect the average marketplace contribution to increase from 20% to 32%, which is a 60% increase.

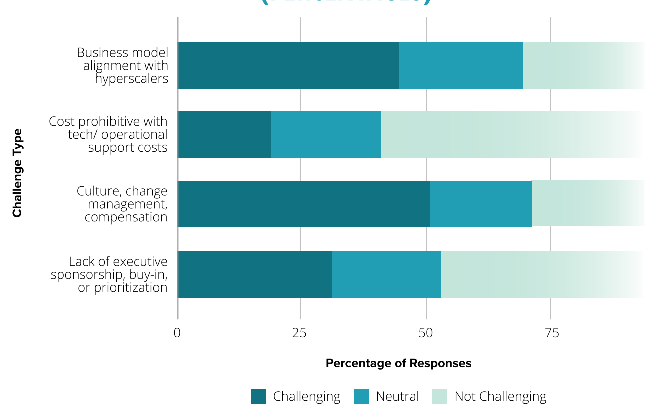
A major reason for this shift is the benefits organizations can leverage from this approach. For instance, 75% of respondents reported access to committed cloud provider spend as a major advantage, followed by improved deal acceleration (47%) and partner incentives (43%).

Considering that the top operational priority for these organizations is achieving revenue growth, it becomes clear that they are increasingly relying on marketplace transactions to help them succeed.

PERCENTAGES OF TOTAL ANNUAL REVENUE TRANSACTED THROUGH CLOUD MARKETPLACES



CHALLENGES IN ADOPTING CLOUD MARKETPLACE (PERCENTAGES)



02 LEARNING 2: CO-SELLING WITH MULTIPLE CLOUDS IS THE NAME OF THE GAME.

Co-sell adoption is steadily improving, shifting from generating referrals to actively collaborating with partners to close deals. Last year, co-sell efforts with cloud partners influenced almost 22% of the net-new deals. Next year, respondents expect 30% of deals to involve co-sell assistance from cloud providers, up about one-third from the previous year. Overall, companies are bullish on co-selling, with 96% responding they expected to see at least 10% more deals to be assisted by co-sell in the next year.

The most popular cloud partner for co-sell is Amazon, with 83% of respondents working with them. Microsoft follows at 51% and Google Cloud at 35%. But very few organizations are partnering with just one cloud provider and have no plans to expand into other cloud provider relationships. 80% of organizations are already co-selling with multiple clouds or plan to in the near future. 28% of organizations surveyed already co-sell with all three major public cloud platforms.

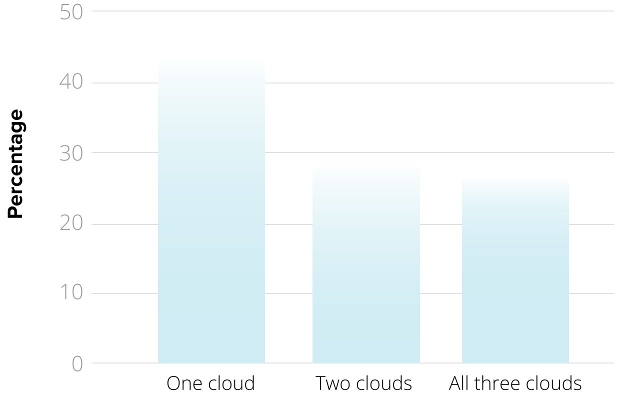
Organizations have taken steps to ensure success, including consistent education for their sellers about the process (30%), assigning a dedicated resource to drive the process (25%), and training the cloud field sellers about their products (17%).

However, adopting this new route-to-market is not without friction. The biggest hurdle (mentioned by 55% of respondents) is getting the attention of the hyperscalers' sellers and managers.

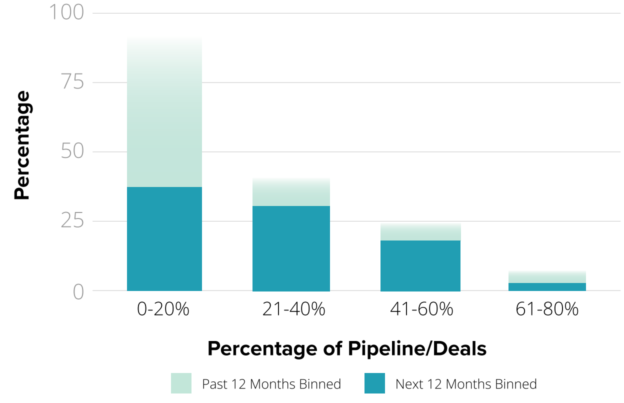
We see this feedback as a foreshadowing of challenges with co-sell scaling. As AI swells the product catalog and more ISVs lean into Cloud GTM, only world-class Cloud GTM execution will break through the noise.

Setting up shop and enabling co-selling with a cloud hyperscaler won't be enough to close revenue gaps. Cloud GTM should be managed like any other route-to-market, with a focus on executive sponsorship, focused resources, sales enablement, and nurturing a strong partner relationship.

COMPANIES CO-SELLING WITH HYPERSCALER CLOUD PROVIDERS



PERCENTAGE OF PIPELINE/DEALS INFLUENCED/ ASSISTED BY CO-SELL

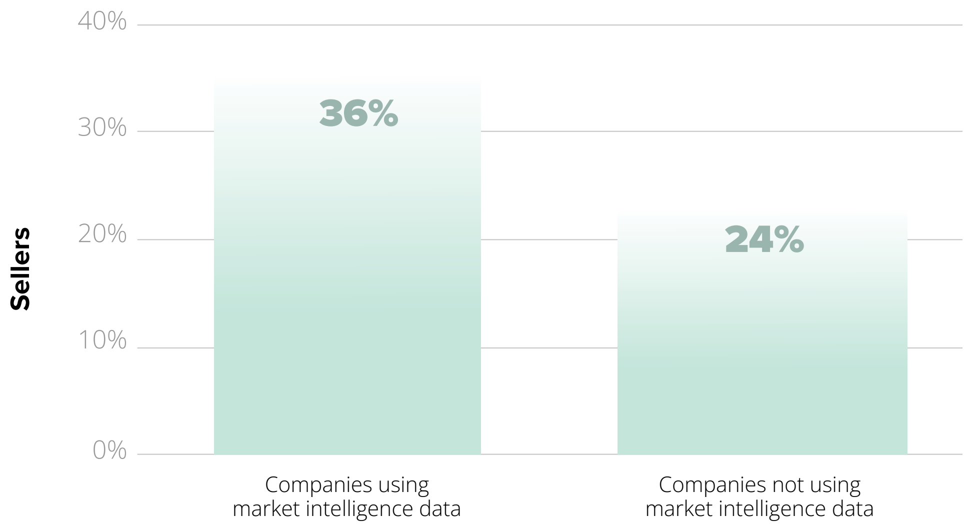


03 LEARNING 3: MARKET INTELLIGENCE DATA HELPS CLOUD GTM SCALE.

A big part of scalable growth comes from market intelligence data like Tackle Prospect—buyer signals that help sellers go faster. 42% of organizations are already using market data in their partner selling motion on a small scale. Another 27% are already using it extensively. The area this has the greatest impact on is how empowered sellers are to close deals via marketplace.

Across all survey respondents, an average of 28% of sellers have closed at least one deal on marketplace in the last 12 months. However, companies that extensively use data in their co-selling motion see an average of 36% of sellers close at least one deal on marketplace, compared to only 24% of sellers from companies that are not yet using market intelligence data.

AVERAGE PROPORTION OF SELLERS WHO HAVE CLOSED AT LEAST ONE DEAL ON MARKETPLACE



04 LEARNING 4: MULTI-CLOUD COMPANIES SEE 10X MORE REVENUE FROM CLOUDS.

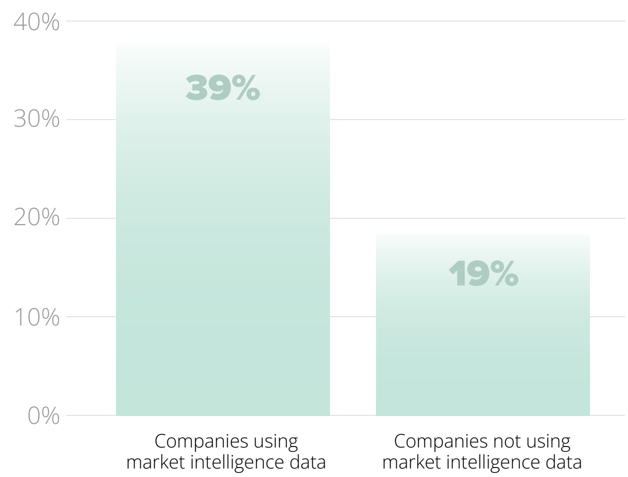
Multi-cloud maturity is emerging as a key driver of co-sell success. Organizations that leverage all three cloud platforms anticipate 39% of their deals next year will be influenced by co-sell efforts—a stark contrast to just 18% for single-cloud users. This disparity underscores the strategic advantage of multi-cloud adoption in fostering stronger partnerships and collaborative selling opportunities.

The benefits of multi-cloud maturity extend beyond co-sell outcomes. These organizations also report nearly 10x higher marketplace contributions to their overall revenue, with an average of 29% compared to a mere 3% for single-cloud users. This data highlights that multi-cloud strategies enhance co-sell effectiveness as well as position organizations to capitalize on the growing importance of cloud marketplaces as a revenue driver.

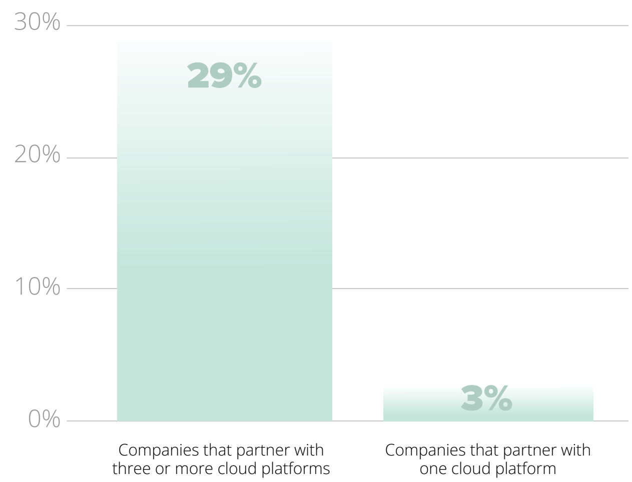
So why is this a 10x increase? Companies that commit to running their products on more than one cloud can meet the requirements of the cloud providers (consumption) and offer buyer choice. This is a material investment from a company strategy, product strategy, and GTM strategy perspective. True multi-cloud is a strategic initiative, not a checkbox. It requires platforming products on multiple clouds so you can meet provider consumption requirements and offer buyers real choice at the point of commit drawdown. In these companies, cloud becomes foundational to how they operate, and it is reflected in how strategic Cloud GTM is to their success.

It may seem obvious, but the companies that have put in the work to develop the most mature multi-cloud practices see greater benefits. Companies that leverage two or three different cloud marketplaces reported increases in deal conversion, deal acceleration, and average sale price.

ESTIMATED AVERAGE PROPORTION OF DEALS THAT WILL TRANSACT THROUGH MARKETPLACE NEXT YEAR



ESTIMATED AVERAGE PROPORTION OF DEALS THAT WILL BE INFLUENCES BY CO-SELL EFFORTS NEXT YEAR



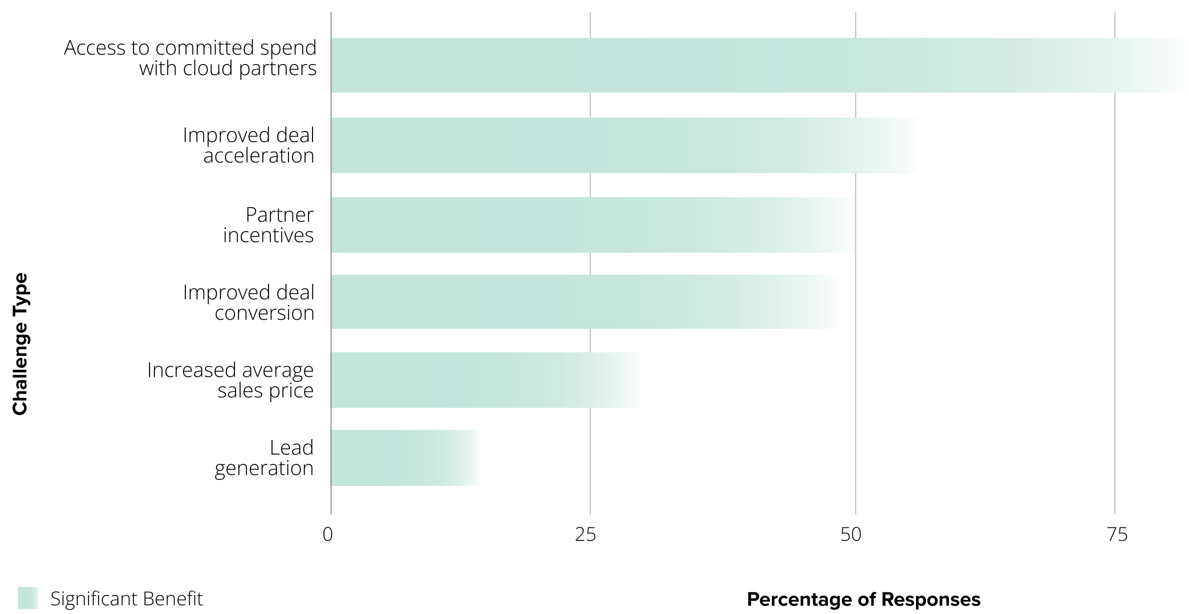
05 LEARNING 5: COMMITTED SPEND IS THE MOST BANKABLE BENEFIT.

Committed spend has emerged as the most bankable benefit of cloud marketplaces, with 74% reporting a ‘Significant Benefit’ from ‘Access to committed spend with cloud providers’. This value stems from the structure of committed spend agreements, where customers are contractually obligated to spend a specific amount with a cloud provider, which they can use for either direct cloud spend or for spend via the marketplace. Cloud providers are pushing more and more customers towards committed spend, with analyst firm Canalys estimating that cloud commitments are over $460B in 2025. The opportunity for partners comes from the fact that customers often overcommit on their cloud spend, resulting in a “use it or lose it” situation at the end of the term, which leads them to evaluate more purchases via the cloud marketplace.

Smaller firms, in particular, are leaning heavily on this advantage. Access to committed spend gives them the confidence to forecast that 75% of their revenue will come from marketplaces next year, leveraging committed spend to move quickly and scale efficiently.

While the benefits of committed spend are clear, many organizations still face challenges with provider engagement, which remains a significant hurdle. Even with these challenges, the ability to leverage committed cloud spend is cementing marketplaces as a vital growth engine, especially for smaller, agile teams aiming to scale efficiently in a competitive landscape.

BENEFIT FROM LEVERAGING CLOUD MARKETPLACE (PERCENTAGES)



06 LEARNING 6: PROVIDER ENGAGEMENT IS THE CHOKE POINT.

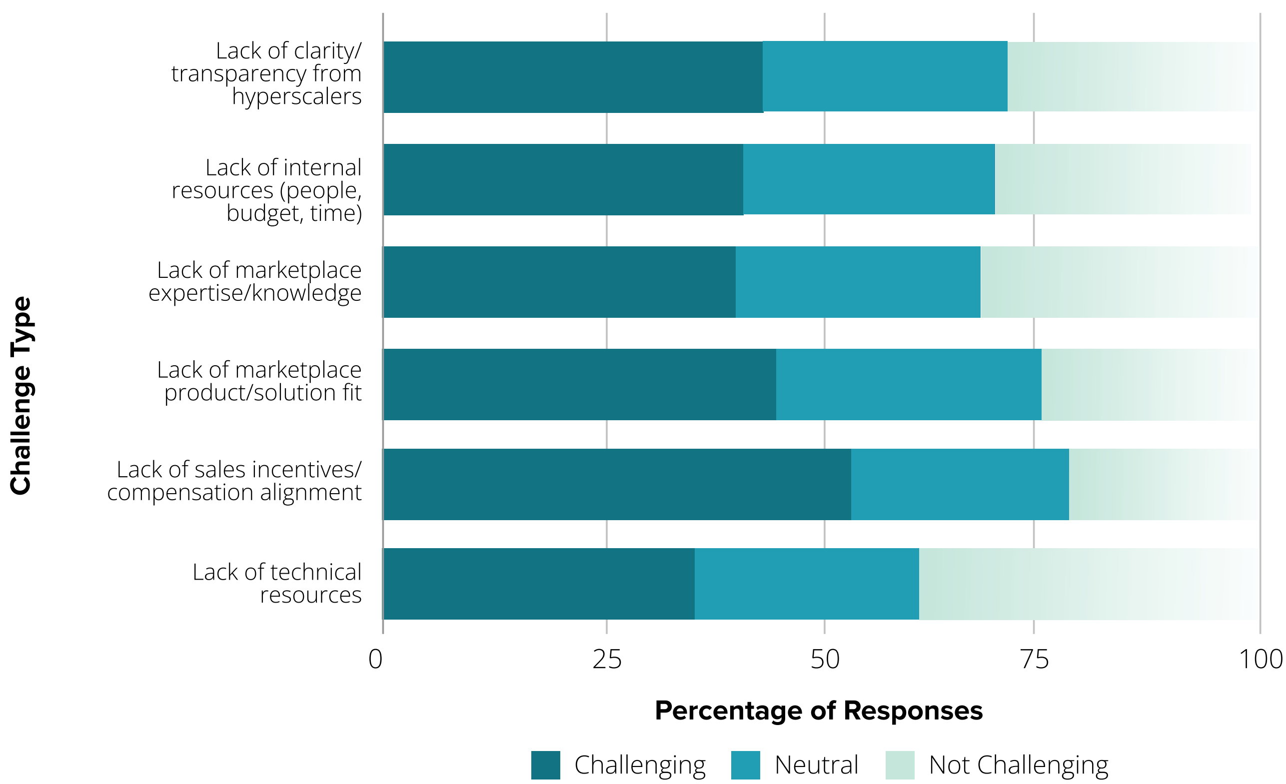
Provider engagement remains the biggest bottleneck for organizations aiming to scale their revenue influenced by cloud providers. Organizations are expecting to increase their revenue generated in cloud marketplaces by 60% in 2026, with committed spend identified as a significant growth driver. However, the survey identifies that provider engagement remains their number one challenge that sellers are facing. This lack of strong engagement from cloud providers is a major roadblock to progress.

The survey asked participants to rank key challenges that sellers face in the adoption of cloud marketplaces and/or co-selling on a scale of 1 to 5, with higher scores indicating greater difficulty.

Organizations identified provider engagement as the top challenge, with 31% rating it "extremely challenging." Day-to-day collaboration with cloud sales is inconsistent, and access to partner development managers is even harder: 46% called it "extremely challenging."

Beyond individual relationships, respondents pointed to a structural dynamic at the hyperscalers: resources are continually reallocated toward the largest partners and strategic deals, creating attention volatility for everyone else. The result is a systemic engagement gap that affects teams and roles across the go-to-market.

DISTRIBUTION OF PERCEIVED CHALLENGES



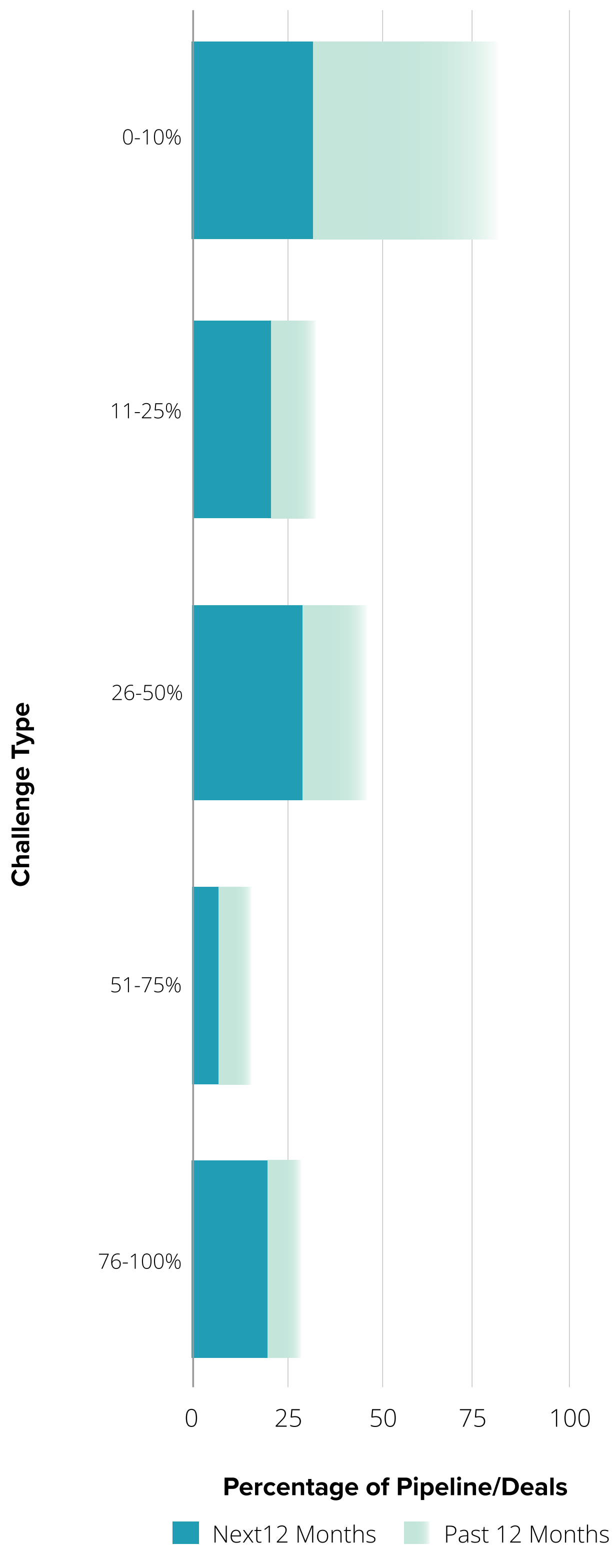
07 LEARNING 7. CHANNEL PARTNERS ARE BECOMING INCREASINGLY COMMON IN MARKETPLACE TRANSACTIONS.

Multi-party marketplace transactions that include channel partners are becoming more and more commonplace. Over the past 12 months, organizations reported that on average 27% of their marketplace transactions involved a channel partner.

However, they expect that in the next 12 months, this will rise a full 10 percentage points to 37% of transactions. 59% of respondents expect channel partner influence to increase next year, with an estimated average of 20% more opportunities to include a channel partner.

This was also reflected in questions regarding the importance of channel partners. When asked how important the partnership with Channel partners/ distributors such as SHI, CDW, or Arrow is to their organization, 33% stated that they are mission-critical to the organization's GTM strategy, with another 27% saying they are critical. The only other partner type that was rated more highly is the cloud providers themselves.

PERCENTAGE OF CLOUD MARKETPLACE TRANSACTIONS INVOLVING A CHANNEL PARTNER



01 PREDICTION 1: THE NEXT $100B WON'T COME FROM "JUST MORE ISVS."

What got us to $100B in marketplace revenue today won't get us to the next $100B in marketplace revenue. What fueled the first $100B—individual listings, brute-force co-sell, and isolated discounting—won't scale. So what will fuel this growth?

We expect that multi-party motions and channel partners will be a major growth driver. Growth will also come from new vectors: AI usage and model APIs, recurring data products, packaged services attached to software outcomes, and selective hardware routed through partner-led offers.

As outcome bundles become the norm, multi-party transactions and commit drawdown on non-license line items start to matter as much as classic license revenue. This broadening introduces real operational work—rev rec, services QA, support, tax, and entitlement reconciliation—but it also unlocks the next tranche of marketplace volume by mapping procurement to how buyers actually achieve results.

02 PREDICTION 2: CO-SELL WILL ONLY SCALE WITH AGENTS.

The only viable way to scale co-sell will be through agentic tools. Headcount alone won't keep up with rising volume and complexity. In the near future, AI agents will sit alongside partner sellers and cloud co-sellers to research accounts, map commits, propose next best actions, draft and route private offers, and keep follow-through on track with auditable workflows.

These agents won't replace teams; they'll make them meaningfully more productive by expanding coverage per rep, compressing cycle times, and standardizing execution quality.

The early signal is already in the data: companies leveraging generative AI expect 33% of their deals to be assisted by co-sell with a cloud provider, higher than the 27% expected by companies not using generative AI—an adoption gap that reflects how agentic workflows unlock co-sell at scale.

03 PREDICTION 3: DATA IS THE KEY TO UNLOCKING CLOUD GTM PARTICIPATION.

Data is the critical missing piece of the GTM motion that unlocks broad, durable seller participation—ultimately the path to getting every seller engaged in Cloud GTM. As market intelligence, commit posture, usage telemetry, and account identity are stitched directly into seller workflows (and into the agents that guide those workflows), co-sell stops being a specialist sport and becomes the default motion for the field.

The early signal is already in the survey: companies that extensively use data in their co-selling see an average of 36% of sellers close at least one marketplace deal, compared to just 24% at companies that haven't yet adopted market intelligence.

That gap will widen as data becomes the operating layer for routing, eligibility, next-best actions, and offer assembly, pushing participation steadily toward ubiquity.

We predict that enterprise ecosystems will quickly follow and adopt hyperscaler-style data practices. The largest platforms (>$10B ecosystems like SAP, Salesforce, Cisco, etc.) and the next tier ($1–10B like Databricks, Snowflake, Workday) will move to provide actionable partner data signals (e.g., propensity, co-sell triggers) similar to AWS/Microsoft/Google.

Partner expectations—set by hyperscalers—are forcing this shift. Delivering data transparency becomes table stakes to activate partners and scale co-sell.

Within the next year, early signs will begin to appear that non-hyperscaler ecosystems (i.e., Databricks, Salesforce, etc) will begin adopting hyperscaler-style data signals to guide when and how to partner.

04 PREDICTION 4: AI IS THE FORCING FUNCTION THAT FINALLY MAKES PLG REAL.

We've had predictions around product-led growth (PLG) for the last four years, and while there's been some progress, this is a bigger evolution for many companies - especially with where the success zone has been for marketplace (Private offers).

AI business models are uniquely suited to PLG motions and usage-based pricing, and that exposes who truly has PLG mechanics. If a product doesn't natively support PayGo—instant provisioning, precise metering, entitlement control, and a clean path from usage to private offer—listing on a marketplace won't manufacture it.

Organizations that can take advantage of using the marketplace for PLG will be the ultimate winners, while traditional seat-based approaches will retrofit slowly or stall. Buyer behavior is shifting with AI; business models and marketplace paths must follow.

05 PREDICTION 5: STOREFRONTS PROLIFERATE AND FEDERATE INTO "BUY ANYWHERE."

We made this prediction last year, but progress has been slow. Yet we still believe that customer pull and partner expectations will push platforms to enable transactable storefront experiences. Many will face a build-vs-partner decision; partnerships (e.g., with marketplace enablers like AppDirect) will accelerate reach. As ecosystems scale, marketplaces become a core GTM surface for discovery, procurement, and co-sell—expanding beyond hyperscalers to the broader $1B+ platform cohort.

These "storefronts" will range in sophistication from simple catalogs that link to other marketplaces, up to fully featured marketplaces that attempt to mimic the hyperscaler transactionality.

Enabling tech such as "Buy now with AWS," evolving marketplace platforms, and catalog syndication will make this practical.

Ten years from now, nearly every serious ISV and channel partner will run a storefront that routes buyers to complementary components and multiple fulfillment channels. The open-standards question remains: do we converge on shared procurement paths or stay proprietary? For now, signals point to proprietary models even as pressure for interoperability builds.

06 PREDICTION 6: GTM BECOMES A PRIMARY CLOUD SELECTION LEVER.

It's already happening today: vendors are selecting which clouds to host their production infrastructure based on go-to-market support as much as pricing (PPA/EDP) and increasingly pairing commits with SCAs to drive distribution. Consumption and GTM collapse into a single operating model where sellers must prove their impact on commit drawdown, and clouds align investment to that verified performance.

What once lived in spreadsheets turns into shared telemetry—tracked usage, explicit financial commitments, and regional scorecards that both sides manage against—and it won't be limited to the biggest alliances; every partner with a commit will be expected to run this way. In parallel, early-stage companies shift their platform choice from "who gives the most build credits?" to "who gets me more deals, pipeline, co-sell access, private offers, and repeatable commit drawdown fastest?"

We've seen the pattern at scale in marquee partnerships; the next phase is making it work for hundreds and then thousands of startups. In the AI era, building is easier than distributing, so founders optimize for GTM leverage first, and product and partner strategy follow.

The winners wire CRM, partner portals, marketplace data, and usage meters into a shared view, compressing time-to-first-PO and raising conversion, while clouds compete by proving tangible GTM lift rather than offering larger credit pools.

CONCLUSION

We're entering an exciting period of Cloud GTM growth and market maturation. Innovation is happening across the clouds, which leads to better ISV and software buyer experiences.

In years past, 20%+ of revenue from marketplace transactions was the gold standard. Now, the top 10% of companies generate 50% of their cloud revenue directly from marketplace transactions, with 58% of that revenue influenced by co-selling efforts. This success suggests that these companies likely have the right strategies, resources, and partnerships in place to maximize these opportunities.

The key takeaway for every organization is clear. The organizations that focus on Cloud GTM see massive advantages. The ones who take it seriously and partner with cloud GTM platforms see the greatest acceleration. The complexity is too great for "build vs buy" to be part of the conversation anymore: standing up Cloud GTM infrastructure in-house (identity mapping, marketplace and CRM synchronization, private-offer operations, and much more) soaks up scarce engineering capacity and ongoing maintenance. So the leading companies choose their cloud GTM platforms wisely.

Are you ready to join the top companies that are seeing a 50% revenue uplift from Cloud GTM? Learn how Tackle can help. Reach out to us at marketing@tackle.io.

“The bar for Cloud GTM excellence is rising. It’s time to go all-in with Cloud GTM.

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Have questions or comments about this report?

Interested in having Tackle debrief you or your team on our findings, or do you want to be emailed when new Tackle research is available? Reach out to us at marketing@tackle.io.

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