



# The Hyperscaler Co-Sell Reset 2026

Badges are out. Pipeline, marketplace revenue, and proven outcomes are in.

A field guide for ISV founders and alliance leaders deciding where to build a partnership motion.

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# The 2026 Shift

"Certification without active execution is no longer sufficient."

Badge-based specialization are over.

All three hyperscalers have fundamentally restructured how co-sell access is granted, and the rules have changed permanently.

Punchline: Reward outcomes rather than program activity.

The question: Will the outcome-based models create better conditions for collaboration between ISV & hyperscalers that customers have been asking for?

## Live Pipeline

Active opportunities in partner portals are now mandatory, not optional proof points.

## Marketplace Transactions

Revenue routed through hyperscaler marketplaces is a hard threshold requirement.

## Proven Outcomes

Validated customer results replace certification scores as the currency of credibility.

# AWS: The Pipeline Toll

ISV ACCELERATE

## The Numbers That Matter

**5**

### Launched Opps

Minimum launched opportunities required in ACE  
(trailing 12 months)

**15**

### Qualified Co-Sell

Qualified co-sell opportunities required in ACE  
(trailing 12 months)

**\$2B+**

### Marketplace Revenue

Partner-transacted revenue milestone on AWS Marketplace

**\$25K**

### MDF Bonus

Available for new Agentic AI specialisation categories

## New in 2026

### Partner Central AI Agents

GA on Bedrock AgentCore, validation agent cuts specialization documentation by up to **70%**.

### Competency Renewal Rule

Competencies now require **launched ACE opportunities** tied directly to them, no pipeline, no renewal.

# Microsoft: The \$100K Door

CERTIFIED SOFTWARE PROGRAM

REPLACES RETIRED TOP TIER — JAN 2026

## Entry Requirements

### → \$100K Revenue Threshold

Azure Consumed Revenue **OR** Marketplace Billed Sales in the trailing 12 months — either qualifies.

### → Azure-Native Architecture

Solution must be Azure-native with full Azure technical validation completed.

### → Marketplace Transactable

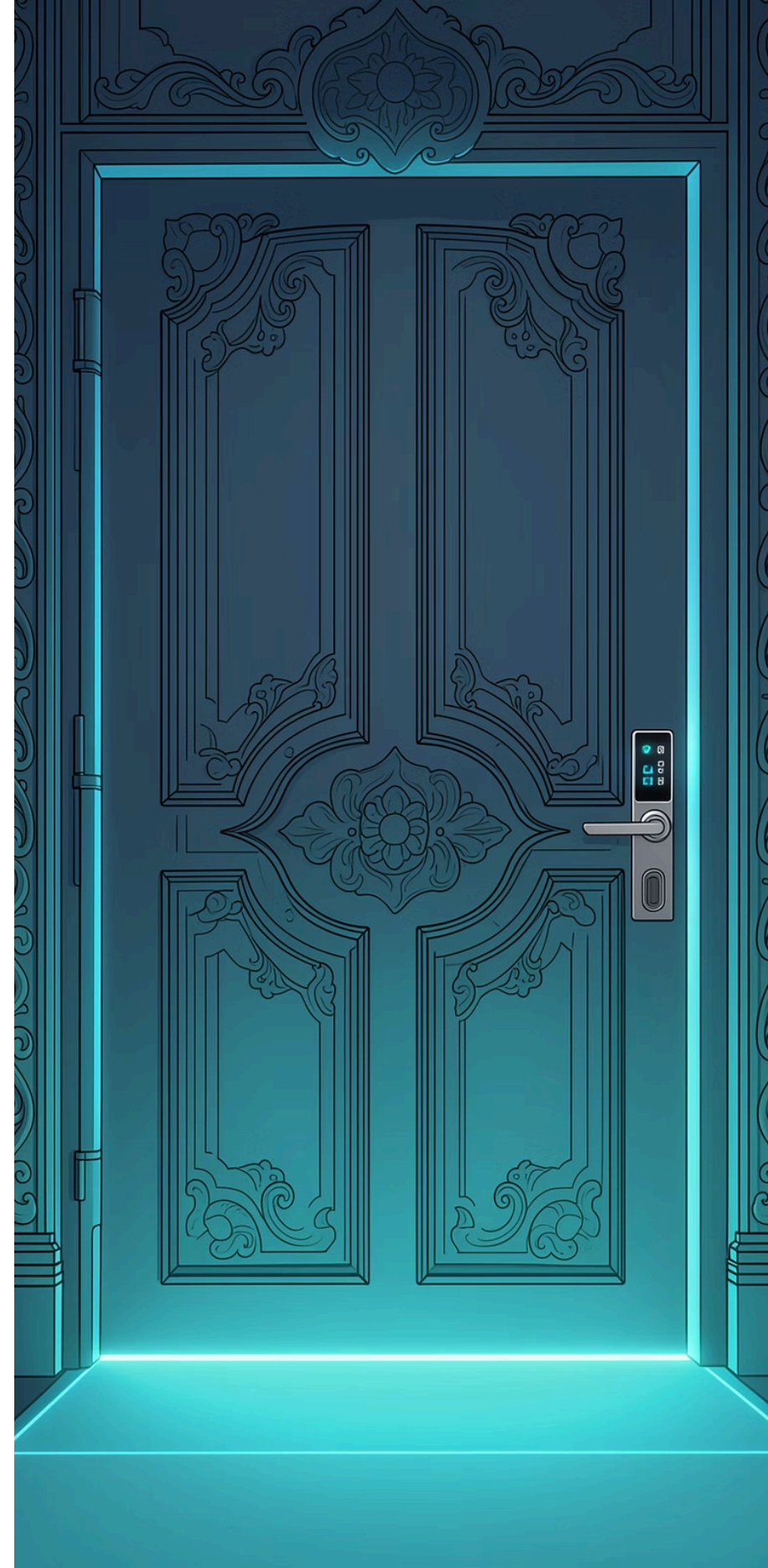
Listing must be transactable on the Microsoft commercial marketplace, Microsoft enters the billing flow.

## Coming in 2026: App Accelerate

A single consolidated program merging ISV Success, Marketplace Rewards, and co-sell resources into one motion.

Nomination-based **early access** available for sub-\$100K ISVs who demonstrate strong trajectory.

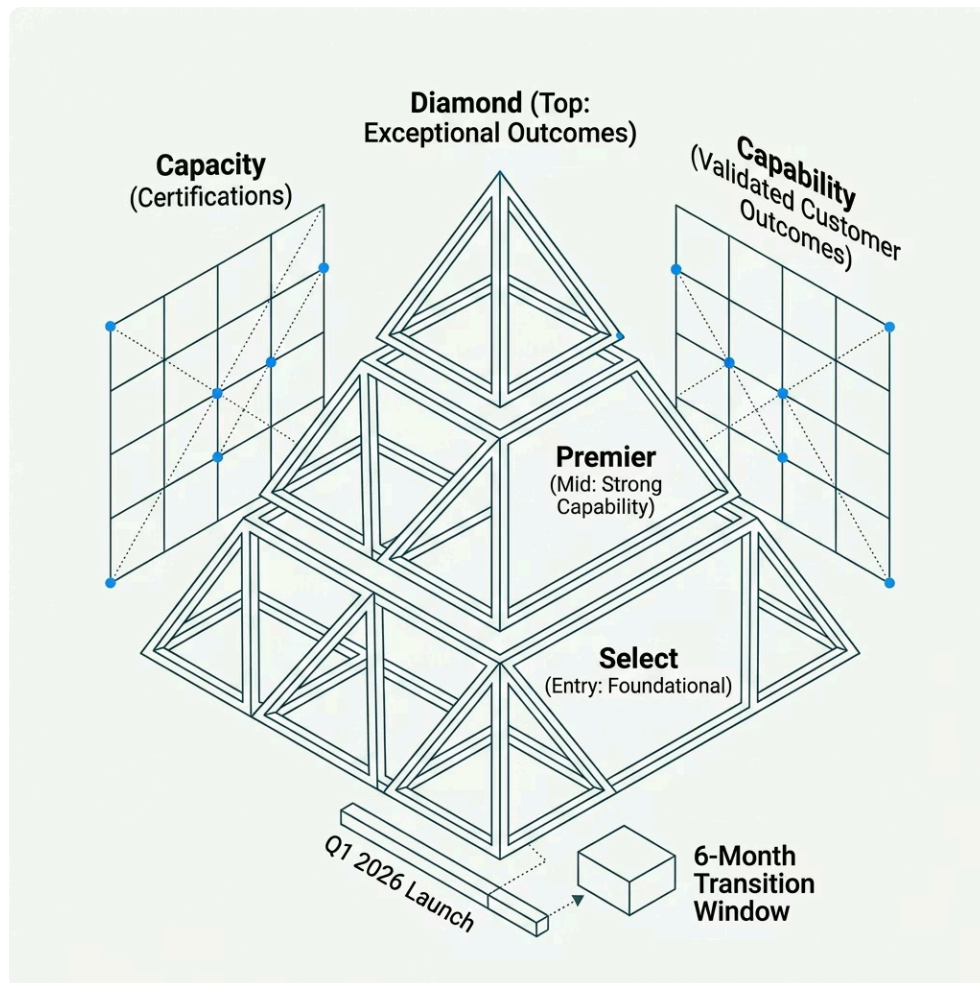
**i** Marketplace routing puts Microsoft directly in the billing relationship, a strategic shift, not just a procurement detail.



# Google Cloud: The Outcome Model

GOOGLE CLOUD PARTNER NETWORK

LAUNCHED Q1 2026



## What Makes This Model Different

Google Cloud has decoupled competency attainment from tier placement. Partners earn competencies through two independent dimensions:

- ✔ Tailwind: Snowflake + Gemini 3 integration in Cortex AI. Snowflake is now transact able on Google Cloud Marketplace, opening a significant new co-sell surface.

Partners have a **6-month transition window** from the Q1 2026 launch to align their portfolios to the new structure.

### Capacity

Certifications and technical headcount demonstrating organizational readiness.

### Capability

Validated customer outcomes proving real-world delivery excellence.

# The Marketplace Gravity


## The Structural Shift

All three programs now route revenue through their own marketplaces. That means the hyperscaler owns the billing relationship, not the ISV, not the reseller.

## The Tension

Single-platform co-sell mechanics collide directly with multi-cloud customer realities.

Marketplace strategy is now a board-level question, not a procurement one.

 ISVs who treat marketplace listing as a checkbox, rather than a revenue motion, will find themselves locked out of co-sell eligibility as thresholds rise.

### AWS Marketplace

\$2B+ in partner-transacted revenue. Pipeline tied directly to competency renewal.

### Microsoft Marketplace

Transactable listing is a hard requirement. Microsoft enters the billing flow at the programme level.

### Google Cloud Marketplace

Snowflake now transactable. Marketplace presence tied to capability validation.

# 4 Questions Before You Build

Before committing to a co-sell motion with any hyperscaler, every ISV founder and alliance leader should be able to answer these four questions with specifics, not generalities.

1

## Where is your customer's spend?

Work backwards from their cloud footprint. Co-sell eligibility means nothing if your customers live on a different platform than your program investment.

2

## How ready is your co-sell infrastructure?

Pipeline in the partner portal, marketplace listing live, opportunities linked. All three must be operational before you engage the field.

3

## Who controls your model access layer?

Frontier model relationships. Bedrock, Azure OpenAI, Vertex, are now strategic, not technical. Know who owns this decision inside your organization.

4

## Do you know your hyperscaler counterpart by name?

Eligibility does not equal engagement. A named relationship with a partner development manager is the difference between a listing and a pipeline.

- Your GTM strategy has to align technology, people & process. All three. These are the core tenants to a traditional channel GTM models as well.

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