



In partnership with  bridge partners

2026

ECOSYSTEM COMPASS REPORT

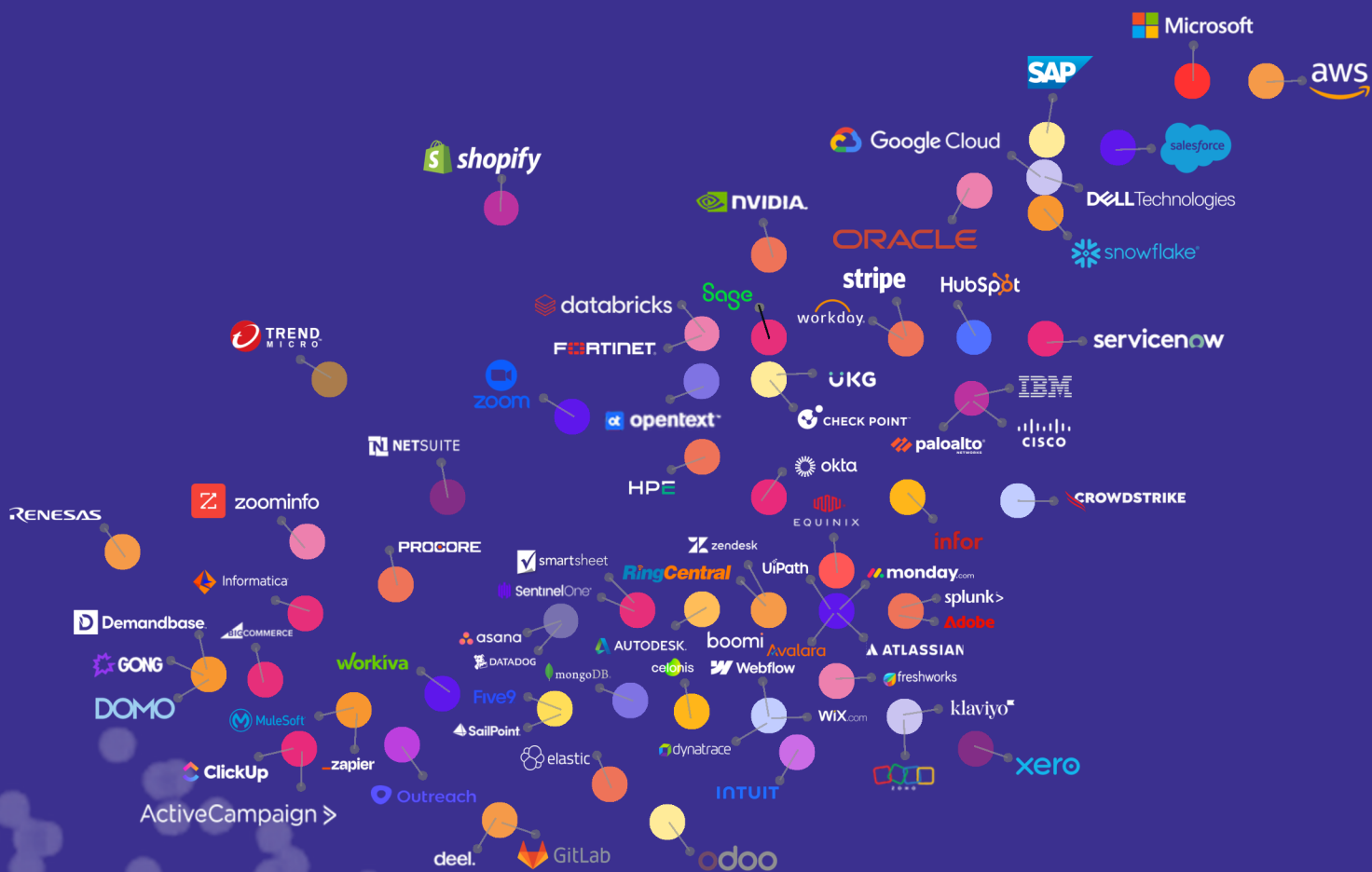


TABLE OF CONTENTS

Introduction	01
Strategic Partnerships Require Executive Buy-In	02
The Ecosystem Compass Quadrant	03
Top Performing Ecosystem Leaders	04
Top 5 Ecosystems Deep Dive	05
Partnership Industry Themes	14
Conclusion and Next Steps	22
Appendix	23





TAI RATTIGAN

Co-Founder & COO



Tai has over 15 years of experience building partnerships & BD teams at:



We take the job of rating the top ecosystems each year very seriously. We know that Partnership Leaders across all company sizes use this report to decide where to commit their precious resources. We also know that the people working tirelessly to build great partner programs will be graded on their ranking on the compass.

For this edition, we spent the last 6 months updating our data models to provide an even more accurate view into where there is an outsized opportunity for partners and where investments are being made to ensure their success. Our analyst team had hundreds of conversations with teams throughout 2025, understanding their priorities, roadmap, where their partners are getting value, and how they are navigating the quickly changing technology environment. We are confident that this effort is singular in its sophistication and reliability.

We also know that this has been a challenging work environment with many people who we could consider top talent in the industry being impacted by layoffs or landing at companies that don't take partnerships seriously - we hope the compass is helpful for you to make decisions on where you want to work for the next leg of your adventure!

The technology industry is evolving faster than at any time in history. It may seem like a trope, but what previously took years is now happening in months, weeks, and even days thanks to advancements in AI. We are very optimistic about all of the progress happening and that Partnership Leaders has become the place people look to learn what is working.

Thank you for supporting our work and helping us build the future of partnerships together!





PENNY BYRON

Director, Partner Ecosystem, Demand Generation and Go-to-Market Strategy



Penny has over 17 years of experience building partnerships at:



Introduction to Bridge Partners

Bridge Partners is a strategic growth consultancy built for the modern technology ecosystem. For nearly 20 years, we've helped platform providers and their partners translate complexity into clarity, orchestrate high-impact go-to-market strategies, and accelerate revenue across the product lifecycle. Our BridgeIQ operating model combines artificial intelligence, human expertise, and partnership orchestration to enable faster, smarter execution across product and partner GTM motions. We deliver growth with precision, purpose, and scale.

This report reflects a shared belief: ecosystem strategy is now a primary growth lever. As platform models mature and AI reshapes execution, leaders must connect vision to orchestration across product, marketing, sales, and partners.

Developed in collaboration with Partnership Leaders, the insights that follow combine real-world perspectives with practical strategies, advancing how Partner GTM drives measurable impact across the ecosystem.



Introduction

Ecosystems are quietly becoming one of the largest revenue channels in the technology industry. Some estimates put the value at \$100 trillion by 2030.

For most teams, the hard part is deciding which ecosystem to bet on strategically. While partner programs have grown more mature over the years, they have also become even more similar. You'll find that each ecosystem offers almost the same partner program structure: tiered benefits, certifications, referral commissions, co-selling, etc. So, how do you decide where to invest?

This is what the Ecosystem Compass is built for.

The report presents a quantitative and qualitative analysis of the world's 75 most influential technology ecosystems, evaluated across two dimensions: Partner Investment and Partner Opportunity. Our research began with 5,000 ecosystems, narrowed to the 75 ecosystems we highlight in 2026.

This report includes:

- The Ecosystem Compass Quadrant, mapping the world's top 75 technology ecosystems
- Key themes across the top ecosystems
- Five ecosystem deep dives into the highest-scoring companies in the quadrant

Use this report as a practical reference to inform strategic partner decisions and identify where your program is most likely to find real revenue opportunities.

What is an Ecosystem?

An ecosystem is the environment around a platform that enables third parties (partners, developers, creators, and adjacent businesses) to build and sell services and where customers discover and use them.

The best ecosystems will have these five building blocks:



Gravity

Customer demand, developer adoption, and usually some combination of capital, M&A, or influencer channels that expand what gets built around the platform.



Distribution Opportunity

A large customer base or audience that partners can access to acquire new customers.





Revenue Opportunity

Valuable problem sets that customers are willing to pay services and technology companies to solve for them.



Partner Catalog

An app marketplace, integration directory, or partner finder that helps customers discover solutions.



Program Structure

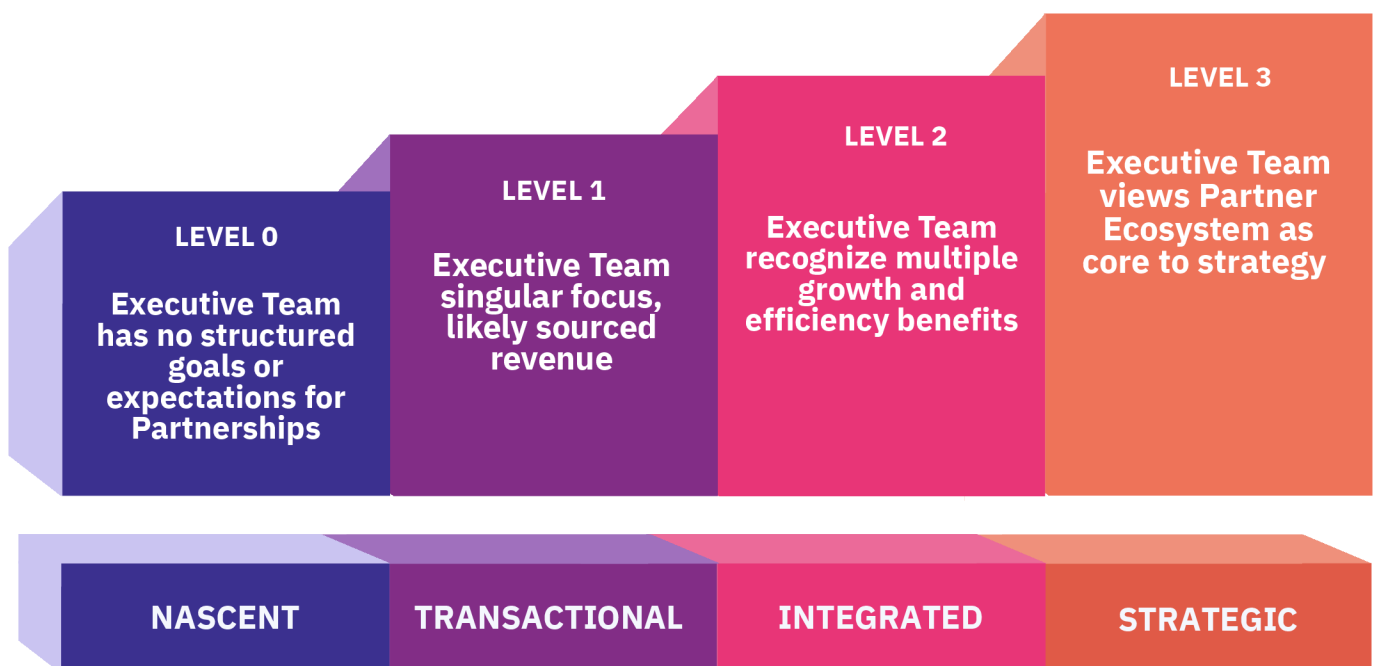
Tiers, competencies, benefits, and a path for partners to progress.

Strategic Partnerships Require Executive Buy-In

If you are deciding which ecosystem to invest in strategically, you need to ensure your executive team is ready for the commitment they require. You are unlikely to generate referrals quickly by partnering with a major ecosystem company. For most teams, it is an influenced revenue strategy to help increase the win rate of deals, the contract size of customers, their retention, and adoption, etc.

Our Partnership Maturity Framework lets you assess readiness against ecosystem expectations using the same criteria as the Ecosystem Compass Quadrant, so you can benchmark yourself against what top ecosystems actually require.

Making a strategic bet on a major ecosystem partnership, or developing any strategic partnerships at all, is most relevant for Level 2 and 3 companies.



The Ecosystem Compass Quadrant

We built this year's quadrant by evaluating the top 75 technology ecosystems using a scoring model built around two dimensions:

- **Partner Investment** data we used for assessing partner Program Investment included the ratio of partnership (and related titles) employees compared to other roles in the business, the program and marketplace maturity of companies, and the resources they invested in highlighting the partners participating in their programs.
- **Partner Opportunity** data includes the volume of customer interest and searches in the partner ecosystem, amount of customers, product ratings, and the average value of a customer.

Each ecosystem is plotted on a quadrant with Partner Investment on the x-axis and Partner Opportunity on the y-axis. This creates four distinct categories:

- **Ecosystem Leaders** (high investment and high opportunity)
- **Emerging Opportunities** (lower investment but high opportunity)
- **Specialized Programs** (high investment but lower opportunity)
- **Foundational Builders** (lower investment and lower opportunity)



Top Performing Ecosystem Leaders

We're proud to recognize the 10 leading ecosystems this year. These ecosystems scored highly on both Partner Investment and Partner Opportunity, enabling partners to generate meaningful revenue while receiving strong support to succeed within each ecosystem.

- | | | | |
|---|---|----|--|
| 1 |  | 6 |  |
| 2 |  | 7 |  |
| 3 |  | 8 |  |
| 4 |  | 9 |  |
| 5 |  | 10 |  |

Top 5 Ecosystems Deep Dive

Beyond the quadrant insights, we went deeper into the top five ecosystems in the Compass to identify standout initiatives these companies are implementing to support their partners.

1 AWS

For the first time in this report, AWS tops our Ecosystem Leaders. Its partner program is exceptionally generous, with deep financial incentives and a marketplace that has become one of the most influential procurement channels, enabling more than 3 million subscriptions. AWS also has an impressive customer adoption rate, with 99% of its top 1,000 customers having at least one marketplace subscription.

alteryx



PRASHANT CHAMARTY
Strategic Alliance Manager UK&I

The partners winning in AWS are those embedded in EDP burn-down conversations.

Combined with a sophisticated co-marketing and partner management layer, AWS is a true growth platform for partners.



Co-marketing Support, Marketing Development Funds, and Promotional Credits

Partners inside the AWS ecosystem find it easy to activate co-marketing with them. They can access MDF through clear, repeatable funding paths, get hands-on guidance with a human partner marketing concierge, and marketplace incentives to customers who purchase from participating partners.

- AWS MDF provides partners with financial support to drive brand awareness and generate new sales leads. Partners can receive either cash reimbursements for up to 50% of eligible campaign costs or AWS Promotional Credits to offset technical usage expenses.
- They also have a dedicated support layer through the Virtual Partner Marketing Manager (vPMM), which is an actual human who works with the partner on a joint plan and guides them on how best to use a partner's MDF.
- AWS recently launched the Marketplace Private Offer Promotion Program (MPOPP) to drive new customer acquisition by using AWS Promotional Credits to buy from participating ISVs via the Marketplace.

wipro



JULIEN BRAIN

Global Director, AWS Strategic
Partner Programs

AWS Marketplace introduced the MPOPP program (AWS Marketplace Private Offer Promotion Program), to help ISVs with customer acquisition by offering promotional credits to customers purchasing through AWSMP.

Partner Innovation Funding and Incentives

AWS goes well beyond the usual MDF and promotional credits. It has a deep bench of partner funding programs for team enablement, product development, and market expansion.

These initiatives inject more funding into partners so they can move faster with less risk and more confidence that AWS will co-invest in their success.

- **Partner Greenfield Program:** funds partners supporting a new AWS practice. As of writing, this includes migration and modernization, generative AI, and security.
- **Partner Transformation Program:** enables partners to align their business with AWS, including shifting offers toward AWS priorities and retraining teams to support repeatable co-sell and migrations.
- **Global Startup Program:** an invite-only, GTM initiative designed specifically for early- to mid-stage software startups. AWS assigns Partner Development Managers and Partner Solution Architects to partners to support product development, GTM, and co-sell.

- **Business Outcomes Xcelerator:** supports partners in developing solutions tied to business outcomes, such as reducing costs and improving cloud security, rather than general cloud services.
- **Innovation Sandbox:** offsets usage costs during development, allowing partners to prototype, integrate, and launch on the marketplace. Simply put, this program lowers the cost of building new products on AWS.

Automating Partner Workflows in AWS Partner Central

Historically, managing opportunities and funding has been manual and portal-based. With AWS's recent APIs, partners can automate specific partner activities and reduce admin load.

- **Selling API:** integrate a partner's CRM with Partner Central, allowing partners to automate the creation and management of co-sell opportunities within their own systems.
- **Benefits API:** is meant to centralize benefit discovery and management so partners can programmatically discover, apply for, and manage benefits across AWS Partner Programs.
- **Channel API:** lets solution providers/distributors programmatically manage resale operations (onboarding, relationship management, discount qualification, etc.)
- **Account API:** supports account/profile management, partner connections, workflows, notifications, and sandbox testing.

This is huge for partners running large, multi-region AWS practices. By eliminating manual updates, partners can sell faster and enhance the sharing of results from the AWS marketplace into their CRM.

2 Microsoft

Microsoft has one of the most extensive enterprise footprints on this list, with 95% of the Fortune 500 using the Microsoft Cloud, and daily reach across Microsoft 365, Windows, and Azure, reaching over 1 billion customers. That reach is exactly what makes this ecosystem so attractive to partners. The Microsoft AI Cloud Partner Program is designed to plug partners into those surfaces through solution areas like Modern Work and multiple Azure tracks.

Its revamped Microsoft Marketplace is its distribution advantage. Selling there helps partners reach customers with billions of dollars in pre-committed cloud spend. Its field sellers are also incentivized to co-sell partner products to millions of customers with a Microsoft contract.

The Unified Microsoft Marketplace

Azure Marketplace and AppSource now roll up into Microsoft Marketplace, so customers can find, purchase, and deploy partner solutions from one place. Microsoft is also pushing Marketplace beyond “apps” into AI apps and agents (with 3,000+ available as of this writing), and making them discoverable within products like the Microsoft 365 Copilot and Azure AI Foundry.





VINCENT POLITO
Founder & Principal Consultant
Strategic Alliances

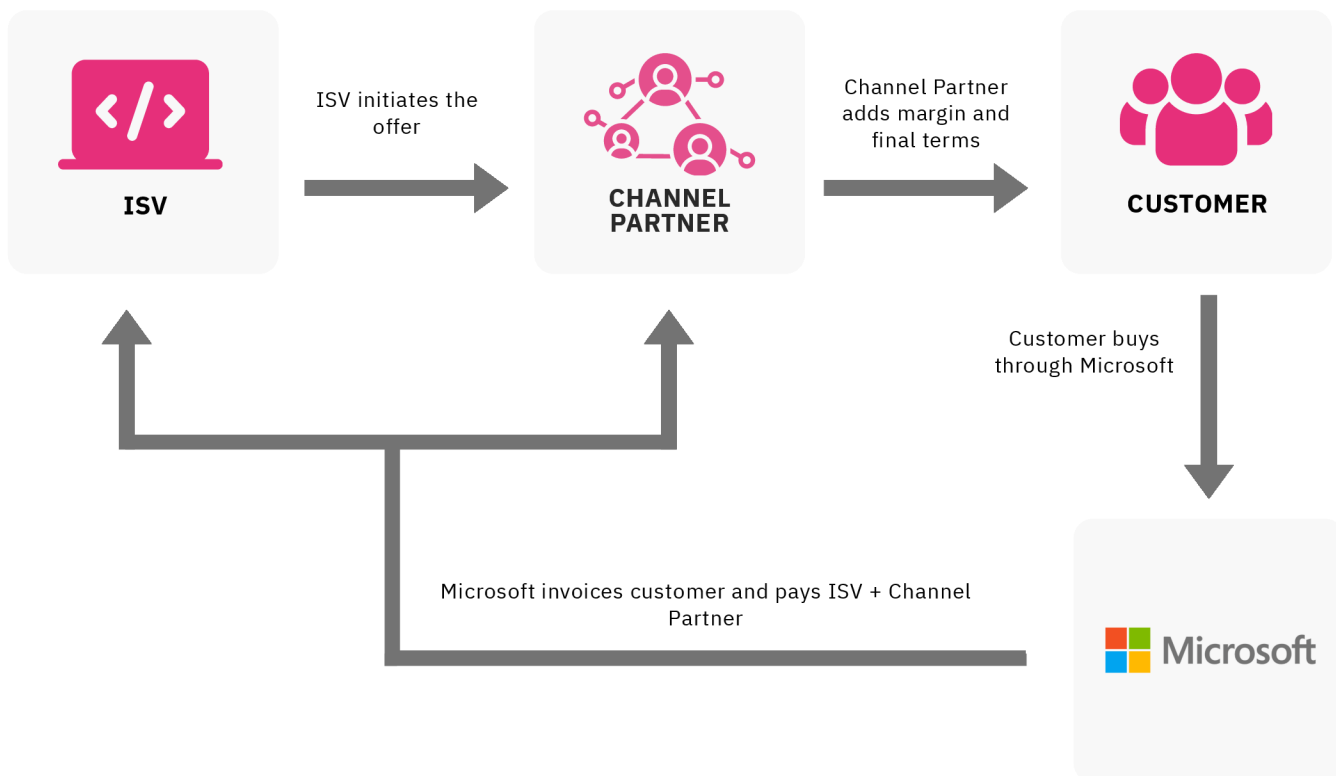
Microsoft is deeply invested in the Azure Marketplace as its procurement portal.

This unified marketplace is a cleaner way to reach internal IT teams and business buyers through its trusted partner network.

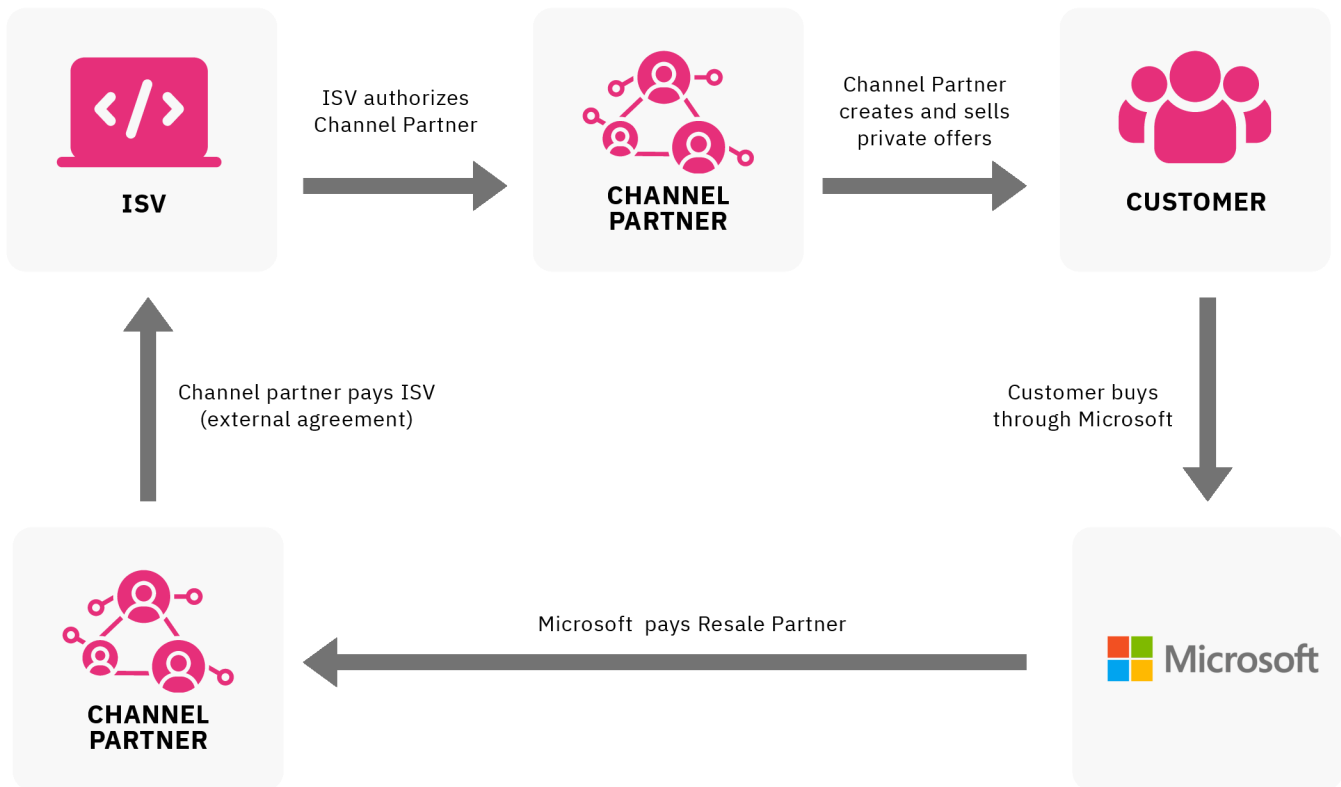
ISV + Channel Partner + Customer = Power of Three

The Power of Three refers to the motion where the ISV, channel partner, and the customer work together on one deal using the Microsoft Marketplace as the transaction layer. There are two motions where the Power of Three can happen:

Multiparty Private Offers



Resale-Enabled Offers



Enabling Partners Through Funding and Support

Microsoft's Marketplace offers partners rewards and incentives to help them land bigger accounts without a large marketing department. Its ecosystem is also inherently structured to incentivize its field sellers to co-sell with partners.



ELEANOR THOMPSON
Director of EMEA Partnerships

As you scale transactions, you unlock a 'reinvestment' phase - getting access to joint marketing funds and customer incentives that help you compete for larger enterprise accounts.

- **End Customer Investment Funds (ECIF):** Microsoft's co-investment fund that partners use to unblock a customer's Azure adoption. Partners use ECIF to deliver 1:1 training that accelerates their customers' skills and adoption. Partners typically apply with a Statement of Work and projected Azure consumed revenue, working with their Partner Development Manager or Microsoft field contact.
- **The Microsoft Partner Concierge:** Microsoft's one-on-one support for partners under the Microsoft AI Cloud Partner Program. Partners get a specialist who helps them activate benefits, tighten their marketplace and referral execution, and move faster on GTM. The concierge offers support for partner marketing, sales, and success.

3 Salesforce

Salesforce is one of the original innovators in tech marketplaces. It launched AppExchange in 2005 as the world's first and largest technology marketplace, and remains a dominant player in the CRM space.

AppExchange: The First Tech Marketplace

AppExchange is Salesforce's strongest ecosystem advantage. It gives partners a massive, warm market of customers already using Salesforce's CRM platform, with an estimated 150,000 customers and 13 million app installs.



TYSON ARNOLD

The key as an ISV is to get embedded with the AE's. Fine-tune your messaging around how your solution fills a current functionality gap with Salesforce's own offerings.



PATRICK HANLEY
Global Technology Ecosystem Lead

To really excel, partner leaders need to determine who inside the Salesforce business benefits from their joint solution and forge their own relationships with those teams. This entails regular meetings with executives, running enablement sessions, and helping Salesforce look good in front of joint customers.

On top of that, Salesforce is pushing its marketplace into agentic AI with AgentExchange, the marketplace for Agentforce that launched in 2024.

Partners can gain insight into listing visits, keyword performance, and customer engagement through the AppExchange Partner Console. The console shows how customers find and interact with a listing, including the top AppExchange search terms driving traffic and the actions they take on the page.

The Gold Standard for Partner Enablement

Salesforce has the best enablement for users and partners across any ecosystem, and it's a big reason AppExchange and the broader Salesforce economy stay so dominant. Salesforce's enablement layer is used to ramp up a company's new hires and reps, and by external partners through the Salesforce Experience Cloud, so they stay trained, current, and aligned like an internal team.





MIKE STOCKER
VP, Partnerships

Enablement efforts are critical. I found that you have to align with Salesforce's own top priorities (AgentForce and Data Cloud are current). If you can identify a few wins (deals won, customer value case studies, salespeople that understand your value prop), those can all dramatically improve results.

Some of the key components of Salesforce Enablement are the following:

- **Trailblazer:** one account across Trailhead, Partner Community, AppExchange, Help, and the community. Partners stop juggling separate logins and separate profiles just to train teams and access partner resources.
- **Partner Learning Camp:** sits inside Partner Community and serves as the partner training library. It offers 1,500+ on-demand trainings built for partner roles across ISVs, consulting firms, agencies, and resellers, so teams can ramp up and stay current without building their own curriculum from scratch.
- **Trailblazer Score:** gives partners a visible scorecard tied to partner program progress, tracked in Partner Community and updated on a defined cadence.

A Multi-Layer Marketing Engine

Marketing in the Salesforce ecosystem is massive. Salesforce gives its partners packaged assets to launch campaigns, increase visibility, and offers multiple ways to earn exposure through the AppExchange and Salesforce's event machine.

- **AppExchange Marketing Program:** A paid co-marketing program for AppExchange partners, positioned as a way to reach Salesforce customers, employees, and influencers, and drive more leads through AppExchange-centered tactics and promotions.
- **Partner Marketing Center:** library of customizable assets that partners can deploy as integrated campaigns, including sales decks, email campaigns, call scripts, co-branded campaigns, and digital ad and social assets.

Salesforce also supports lighter-weight visibility plays, such as "Free Ways to Market with AppExchange" (guest blogging and submitting news for Salesforce social sharing), AppExchange customer spotlights, and partner presence at major Salesforce events, including Dreamforce.

4 SAP

SAP's ecosystem is shaped by enterprise: large organizations running complex systems and high-stakes operations. SAP says 87% of global commerce touches its systems in some way, which helps explain why it takes partnerships so seriously.

It relies on partners to sell, implement, and support complex enterprise transformations, while sitting on structured, contextual data across finance, supply chain, HR, and commerce. These are all business-ready data that carry even more weight in an AI-driven market.

SAP PartnerEdge

PartnerEdge is one of the most thoughtfully designed partner programs in the market. It's comprehensive and complex, reflecting the level of commitment that SAP expects from its partners.

Rather than relying on a simple tier model, SAP layers company-level partner status, competencies, and product-level specializations to show which partners are actually qualified to deliver.

That structure is valuable in Partner Finder, which is one of the most comprehensive partner directories we've seen. A partner's levels, competencies, and specializations are visible on its public profile, giving customers a much clearer view of who is qualified for what. SAP touches a wide range of enterprise functions and industries, so that visibility matters. The more a partner invests in certifications, specializations, delivery proof, and overall program standing, the easier it becomes for customers to find them.

CAMUNDA



PEDRO GASTAL
Global Partner Marketing Lead

For ISVs entering the SAP ecosystem, awareness follows credibility. Partners typically need proof signals such as customer outcomes, integration validation, and a clear tie to SAP's transformation priorities (particularly the S/4HANA migration wave) before co-marketing with SAP becomes realistic at scale.

Incentives and Development Funds for Public Cloud Migration

Many of SAP's customers are large enterprises running older on-premises systems, and partners play a major role in helping them migrate to newer cloud products. That's why it's offering multiple incentives to partners to push customers to public cloud, including:

- **Development Funds:** SAP's co-investment pool for eligible partners, aimed at building a public cloud pipeline and readiness.
- **Cloud Choice:** SAP's commercial model for public cloud deals that gives partners more autonomy in how they sell and participate in those transactions. It is designed to make the public cloud more attractive for partners.
- **Transformation Incentives:** SAP payments tied to Cloud ERP migrations, meant to offset the added cost of moving customers into public cloud.

CAMUNDA

PEDRO GASTAL
Global Partner Marketing Lead

SAP's Partner Benefits Catalog it functions as an online store for enablement and demand generation services, with most fee-based services payable using Market Development Funds (MDF) via automated Direct Pay, removing reimbursement friction. Combined with discovery surfaces like SAP Store and Partner Finder, this gives newer partners a practical path to test positioning and build pipeline before deeper field co-sell engagement is on the table.

Partner Grouping Agreements (PGA)

Large SAP partners rarely operate as a single entity, especially when serving multinational customers, so SAP allows parent companies and majority-owned affiliates to group together for program participation through the Partner Grouping Agreements. That gives partner groups a way to pool capabilities, earn competencies and specializations jointly, benefit from group-based pricing, and present a unified profile in Partner Finder.

SAP for Me

SAP for Me gives partners one place to manage their relationship with SAP. It brings together program requirements, in-progress competencies, project activities, and customer delivery information in a single portal. This level of visibility is critical if a partner wants to unlock the benefits and recognition tied to their program level, competency, and specialization.

5

Google Cloud

With an annual revenue of more than \$50 billion and a massive enterprise footprint, it's easy to see why Google Cloud Platform is one of the top five ecosystems. It's also becoming a serious platform for enterprise AI builds, with more than 85,000 enterprises now building with Gemini on Google Cloud.

The Pendo logo, featuring a red arrow pointing up and to the right, followed by the word "pendo" in lowercase.



GAUTHAM PANDIYAN
Global Head of Partnerships - Solution
Partners, Affiliates & Cloud Alliances

Focus on give-to-get from the ISV pipeline via GCP-Marketplace, and how to drive native GCP service consumption (especially AI-related) in the customer tenant, to get GCP reps' attention & support.

At the same time, Google has rebranded and reset its partner program as the Google Cloud Partner Network, built around new tiers and a competency model, with AI-driven automated tracking for partner impact.

Google Cloud Partner Network

Google Cloud recently announced the Google Cloud Partner Network, a rebranded partner program that's designed to feel simpler and more outcome-driven.



The Google Cloud Partner Network is shifting from workload-based rewards to outcome-based recognition. For partnership leaders, that's a programme rebuild to get ahead of.

It brings partner activity into one place through the Partner Network Hub and uses AI-driven, automated tracking to apply successful customer engagements to a partner's progress across tiers and competencies, with far less manual reporting.

Google frames the model around two signals:

- **Capacity:** measures knowledge and skills, validated through technical certifications and sales credentials
- **Capability:** measures real-world success through pre-sales and post-sales contributions tied to validated closed/won opportunities

AI Agent Marketplace

Google Cloud also introduced an AI Agent marketplace, a transactable platform inside the Google Cloud marketplace where partners can introduce and sell their agentic offerings. Enterprise buyers can use their Google Cloud commits to procure third-party agents from GCP.

alteryx



PRASHANT CHAMARTY
Strategic Alliance Manager UK&I

The 2026 opportunity is Vertex AI and Gemini listings, where agentic AI partners will find the least crowded co-sell motion of the three hyperscalers.

The AI Agent Marketplace is relatively young but already has participation from some well-known consulting and services companies, including Accenture, Deloitte, and VMware.

Google Workspace's Customer Footprint

Google Workspace gives Google Cloud a customer base that most ecosystems would kill for, with 3 billion users and more than 10 million paying customers.

This enormous customer base also makes it easier to hit Google's Committed Use Discounts. A partner can start with Workspace resale or services, then work on increasing customer adoption to build a steady revenue stream.

While Google Cloud has its own Cloud Marketplace, the scale of Workspace Marketplace makes it an even larger distribution surface for Google's partners.

Partnership Industry Themes

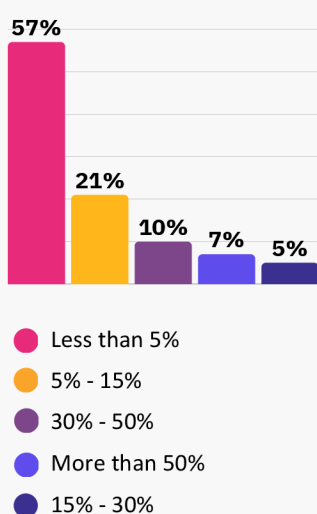
Three themes emerged throughout our research on the top 75 ecosystems. These are the trends we expect to shape how ecosystems are built and how partners grow throughout 2026.

1. Marketplaces Have Untapped Revenue Potential

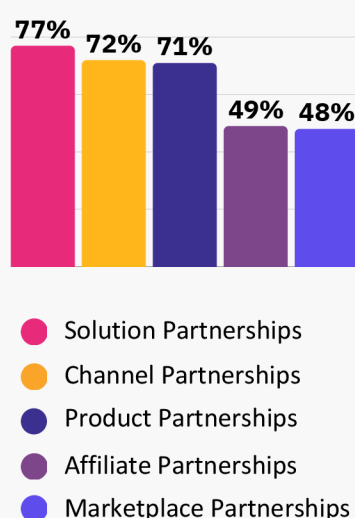
A core pattern we observed in top ecosystems is their use of marketplaces and marketplace discounts to drive partner growth. These marketplaces have evolved from simple partner and product directories, to platforms where transactions occur as customers and partners connect - and where commerce is heavily incentivized.

This evolution points to an untapped opportunity as marketplace adoption becomes more common. 48% of companies already participate in marketplaces, yet only 7% generate more than half of their revenue from marketplace deals. This means that many partners are still early in learning how to turn marketplaces into meaningful commercial results.

TOTAL COMPANY REVENUE FROM MARKETPLACES



TYPES OF PARTNERSHIPS



A mature marketplace can support thousands of listings and millions of customers, and enable repeatable procurement at scale.

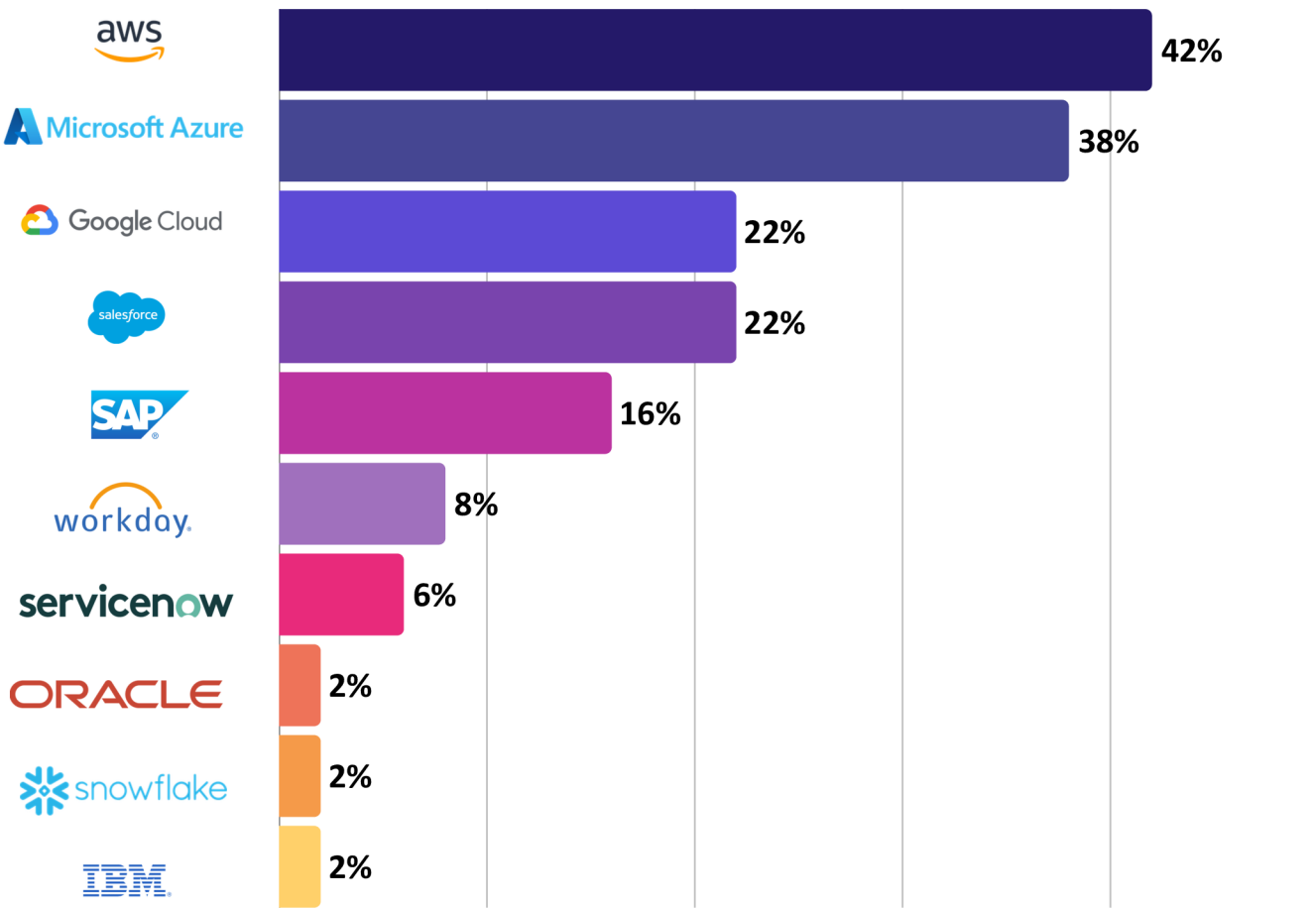
Committed Spend Drives Marketplace Purchases

Five of the highest-ranking ecosystems run on a consumption-based marketplace, using committed spend to drive purchases. In this model, customers commit a budget up front and receive discounts on their marketplace purchases.

The most dominant marketplaces in this category are AWS (42%), Microsoft (38%), and Google Cloud (22%), all of which offer committed spend discounts to customers. This is one of the clearest commercial advantages in the market today.

Top Marketplaces

The results below represent those that answered "Marketplace Partnership"



For partners, the opportunity is not just about being listed but about qualifying for committed spend eligibility within these ecosystems. This is where the majority of partner revenue comes from. Partners that invest in their relationships with these marketplaces and are eligible for committed spend are in a stronger position to access budgets from that marketplace’s customers. As an example, AWS requires an offer to have a “Deployed on AWS” badge before you can tap into a customer’s EDP/PPA commitment.

eleks®



NATALIYA KHORKAVA
Head of Partnership Programs

AWS introduced the "Deployed on AWS" badge - so AWS Marketplace products eligible for PPA drawdown and Marketplace sales compensation incentives are required to run 100% on AWS.



VINCENT POLITO
Founder & Principal Consultant
Strategic Alliances

Microsoft's ecosystem is built around revenue mechanics. At the center of its partner model are Azure consumption and MACC, with Data and AI playing a central role in driving Azure consumption.

Customer teams (such as procurement, finance, security, and IT) prefer this approach because it makes it easier to align on and approve purchases, vet providers, and comes with baked-in discounts.

The Marketplace Maturity Framework

If you're building your own marketplace, it is essential to ensure the platform you create delivers value to your partners and customers. While this sounds simple, we see companies at different stages of maturity, offering varying features to their partners.



We consolidated these variations using the five-level framework above, which you can use to benchmark your company's marketplace today.

Most companies today will be at Level 3, where the marketplace is really just a partner directory with lead capture. You can drive customers to it, route qualified leads to partners, and measure outcomes.

For many ecosystems, that is a strong endpoint. It gives partners visibility beyond what internal teams can do alone, and it creates a repeatable way to generate partner demand without taking on the operational weight of a transactable marketplace. Going beyond Level 3 is a strategic choice, but that is not the default next step.

How Can You Emulate this Strategy?

For programs that do not have a marketplace or do not yet have customer demand to justify one, the lesson is not to recreate marketplace infrastructure, but to build simple yet effective ways for partners to access pipeline.

You can apply the same “marketplace” principle by creating repeatable ways for partners to show up in deals and customer decisions.

That can include:

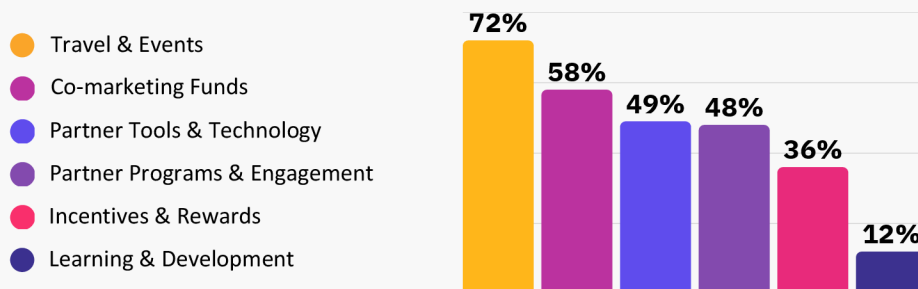
- **Offering discounts on partner services or integration usage.** You can tie a limited-services credit, an onboarding discount, or an integration incentive to a new deal with a partner. This is a simple offer your team can bring to partners without a marketplace transaction.
- **Packaging partner services alongside your core product.** This can be as simple as creating standard bundles for common use cases, such as software plus implementation, software plus migration support, or software plus managed services.
- **Enabling your AEs to sell partner solutions as part of their deals.** Define a few cases where a partner should be introduced, then give them a list of partners, simple positioning, and a handoff path.
- **Giving sellers a quota relief or credit for each qualified partner referral.** Set a small number of rules for what counts as a valid partner referral, track it in your CRM, and make it part of your existing sales process.
- **Create simple partner discovery paths.** Use a partner directory, a recommended partner list, an onboarding flow, or a sales handoff process to connect customers with the right partners.

2. Co-marketing as a Partner Growth Lever

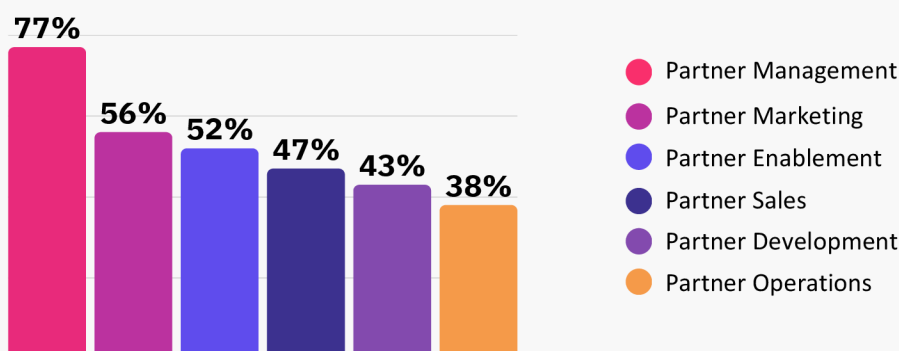
Most partner teams already see co-marketing as a worthwhile investment. Our research shows that co-marketing funds ranked as the largest partnership budget line item after headcount and

travel & events. We also saw teams planning to hire more partner marketing staff in the next 12 months.

Most Common Budget Line Items (Excluding Headcount)



Top Planned Partnerships Hires in the Next 12 Months



For many teams, especially those trying to grow without adding major headcount, co-marketing and marketing development funds (MDF) create a way to tap into the much larger budgets of the ecosystems they participate in and turn that access into pipeline. MDF is a pool of funds that ecosystems make available to partners to offset marketing activity that drives the pipeline. This looks different across the board.

AWS offers them as either cash or “AWS promotional credits.” Microsoft supports this motion with co-op marketing funds that partners earn and then use via reimbursement for pipeline-generating activities. Meanwhile, Google Cloud sends MDF based on the amount of Google Cloud usage generated by a partner’s SaaS product.

Salesforce uses MDF to fund partner marketing. Partners receive earmarked funds and support for specific activities. SAP uses Development Funds to support partner-led initiatives aligned with its strategic priorities, particularly cloud and AI. Partners can use these funds to build a pipeline, improve readiness, and invest in activities that help drive public cloud adoption and aligned GTM.

Huge industry events such as Salesforce Dreamforce and AWS re:Invent also drive partner demand. These events typically run an official sponsorship program that positions them as a venue for customers and partners to gather.

CAMUNDA



PEDRO GASTAL
Global Partner Marketing Lead

Events can be high leverage, but they're not all the same: AWS Summits and re:Invent are major customer and seller moments, while PartnerEquip: Live is positioned as in-person enablement for Specialization partners to sharpen technical capability and co-sell strategy.

How Can You Emulate this Strategy?

If you do not have the budget to offer MDF broadly, do not force it. The smarter move is to identify where your marketing team is getting stuck, then propose co-marketing to fill those gaps.

For example, if your marketing team struggles getting speakers for events, you have a network of expert partners always happy to talk about customer success stories.

Spotlight: The AWS Virtual Partner Marketing Manager

AWS has invested in removing the most common MDF blocker: partners not knowing how to plan and execute these funds.

AWS Partner Marketing Central includes a marketing concierge service called virtual Partner Marketing Manager (vPMM), a personalized guidance to help partners use AWS marketing tooling and build a joint marketing plan.

Spotlight: Microsoft Partner Concierge

Like AWS's vPMM, Microsoft Partner Concierge is essentially a help desk for partners looking to market with Microsoft.

Partners can book time with a specialist to get guidance on what to run, what benefits to use, and how to get the basics right (campaign planning, messaging, and Marketplace profile, etc.).

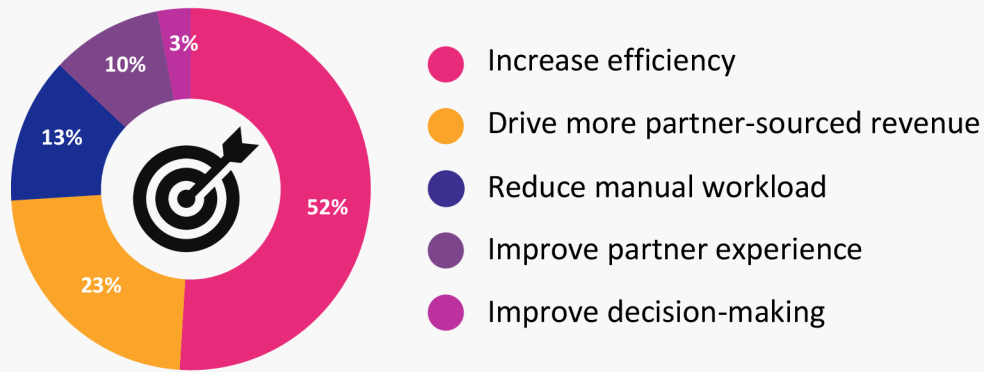
3. Ecosystems are Investing in AI

AI is becoming a core part of how ecosystems work with partners and customers. As more people seek AI-enabled products and services, ecosystems are responding by building dedicated AI marketplaces and categories, integrating AI tools into their teams and programs, and investing heavily in partnerships with AI-first companies. In fact, 45% of the companies we analyzed in our AI in Partnerships research have already adopted AI in their partner programs.

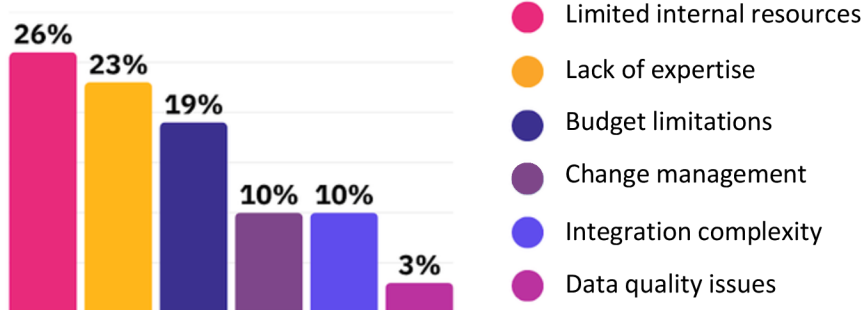
AI in Partner Management

52% of teams say they are using partner tech and automation to increase efficiency, even as adoption faces challenges, such as limited internal resources (26%) and a lack of expertise (23%). The tools most often used in this growing trend include ChatGPT, Claude, Gemini, Perplexity, and Gong.

Primary Goal for Partner Technology & Automation



Biggest Challenge in Adopting AI and Automation



Top AI Tools

- 1 ChatGPT
- 2 Gemini
- 3 Claude
- 4 perplexity
- 5 GONG

Embedding AI in the Partner Experience

AI is also starting to shape the partner experience itself. Our AI in Partnerships research revealed that the most common use case we've seen is portal AIs, such as chatbots and intelligent search.

- **Microsoft Partner Center AI Assistant:** built into Partner Center, this assistant helps partners navigate subscriptions, workspace tasks, support flows, and program eligibility.
- **AWS Partner Assistant:** a generative AI chatbot inside Partner Central and the AWS Marketplace Management Portal. It is trained on partner-specific documentation and helps partners access the content and support they need without digging through multiple systems.
- **Salesforce Agentforce for Partner Community:** Salesforce is bringing AI into its Partner Community to help users get answers to common questions, reduce case volume, and spend less time searching for information.

We explore this more deeply in our upcoming AI in Partnerships Report, where we examine the most useful AI use cases across today's most innovative partner programs. For leaders embedding AI into their teams, this report provides insights into AI adoption, benchmarks, and best practices.

AI Categories, Incentives, and Program Design

Ecosystems are now building AI into the structure of their partner programs. This is starting to show up through new competency tracks, AI-focused categories, and awards that give more visibility to partners building around AI.

AWS launched new Agentic AI categories inside the AWS AI Competency, including Tools, Applications, and Consulting Services. These categories are tied to additional MDF, giving partners a direct incentive to invest in those capabilities.

Ecosystems also use awards to steer partners toward the AI capabilities they want to prioritize. Microsoft's Innovate with Azure AI Platform Partner of the Year spotlight highlights partners building and delivering AI solutions on Azure. AWS has also introduced AI-focused recognition, including Global Generative AI Infrastructure Partner of the Year and Global Generative AI Data Partner of the Year.

Strategic Partnerships with AI Companies

The most aggressive ecosystems are backing AI with real investment.

Snowflake announced a \$200 million partnership with Anthropic in November 2025 to bring Claude-powered agentic AI into Snowflake Cortex AI for enterprise customers. In February 2026, they also announced another \$200 million partnership with OpenAI to make OpenAI models available through Snowflake.

Amazon deepened its relationship with Anthropic through an additional \$4 billion investment, bringing Amazon's total announced investment in Anthropic to \$8 billion. Anthropic is also using AWS as its primary cloud and training partner.

ServiceNow expanded strategic collaborations with both OpenAI and Anthropic in 2026, tying frontier models to its push into enterprise AI agents and workflow automation.

We expect to see more of these investments this year as ecosystems continue to embed AI into their company strategies.

How Can You Emulate this Strategy?

In this theme, the top ecosystems are investing in AI because they see its revenue potential and are then aligning their ecosystems with it. The takeaway here isn't to "do AI because everyone else is." It's that your partner program should align with the company's strategic initiatives, whatever they are.

Your partner program should reflect the company's strategic priorities clearly enough that partners know where to focus. That can show up in your categories, partner directory, messaging, enablement, and the solutions you choose to spotlight.

CONCLUSION AND NEXT STEPS

Our research on the most successful tech ecosystems is not just to produce a ranking of companies. We aim to make it easier for you to navigate these ecosystems and benchmark your program with confidence. With the Ecosystem Compass, you have a complete view of where partner opportunity is concentrated, and how the world's strongest ecosystems actually supports its partners.

If you lead partnerships, you are making high-stakes choices about strategic focus. This report is here to help you make those calls with more clarity and to give you a standard you can use internally when you talk about what needs to change.

Here's what we recommend you do next:

- Know your company's partnership maturity level to guide your team's strategic partnerships and ecosystem decisions.
- Use the Ecosystem Compass to benchmark your ecosystem and to shortlist which ecosystems to prioritize next.
- Set one clear goal for your partner program for the next few months, with an owner and a measurable target.
- Bring the data from this report into internal discussions, especially when you are making a strategic ecosystem decision or asking for investment.

Ecosystems will shape tech's next decade of growth. The advantage will come from having a clear ecosystem strategy and executing it consistently, so partners and customers know what to expect.

Good luck as you put that strategy into practice.

Appendix

Appendix 1: Examples of Committed Spend Models*

COMPANY	COMMITTED SPEND MODEL	DEFINITION
Amazon Web Services (AWS)	AWS Enterprise Discount Program/Private Pricing Agreement (PPA)	A contractual, multi-year AWS spend commitment in exchange for discounted pricing. Eligible AWS Marketplace purchases can count toward retiring that commitment
Microsoft	Microsoft Azure Consumption Commitment	A contractual commitment to spend a specific amount on Azure over a defined coverage period. Eligible Microsoft Marketplace purchases can count toward fulfilling the MACC.
Google Cloud	Google Cloud commitments via Committed Use Discounts (CUDs)	A commitment contract (typically 1 or 3 years) where the customer commits to a minimum spend level or resource usage in exchange for discounted prices on eligible Google Cloud services.

**Not an exhaustive list*