# 35 percent of VMware workloads expected to migrate elsewhere by 2028

During Gartner’s event, Palmer posited that Broadcom’s VMware doesn’t view hyperscalers as strategic partners and vice versa. AWS took issue with Broadcom disallowing AWS and its channel partners to resell VMware Cloud on AWS, telling CRN in May 2024 that it was “disappointed” by the news. Still, hyperscalers, including AWS, have remained interested in doing business with VMware end users “because they know over time they will convert you to ‘proper cloud,'” Palmer said.

Palmer also offered opinions on VMware migrations, which companies have described to Ars as being costly and time-consuming, especially for organizations that have limited manpower or are managing other big IT projects. Considering the lack of true VMware competitors, Palmer recommended partial migrations, which she said should take less time (up to a year) than total migrations, (which she pegged as taking at least three years).

“We are all addicted to hypervisors, and that needs to change,” Palmer said.

Despite losing customers, VMware is driving revenue for Broadcom, thanks to the company’s new focus on subscriptions, bundles, and higher prices. In its most recent earnings report, Broadcom reported that infrastructure software revenue, which is mostly driven by VMware, grew 25 percent year over year to $6.6 billion.

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