

■ ZOPDEV RESEARCH · JUNE 2026

The State of Cloud 2026

An Emerging Markets view of global cloud, told in colour.
Each part carries its own hue across the reading.

■ CONTENTS

Six colors. One argument.

This edition is refracted into color zones. Blue is infrastructure. Orange is spend. Green is out-comes. Scroll and the reading environment retints to tell you where you are.

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■ HOW TO READ THIS

FINOPS LEAD

The 16.9% number, the three personas, and the action gap. Chapters 3 to 5.

CTO / ARCHITECT

Resource sprawl, footprint as a choice, and why the fix is human, not technical.

CFO / BOARD

10 of 10 hypotheses confirmed, and where \$1 in every \$6 of cloud spend is hiding.

■ EXECUTIVE SUMMARY

Cloud stopped being new. The bill is still a mystery.

After fifteen years of migration the question is no longer whether to be on the cloud. It is why the bill is what it is, and what it could be if we treated it like a product.

■ FINDING 01

Waste is hygiene, not strategy

16.9% of every cloud dollar is recoverable, and 87% of those items are forgotten resources, not bad architecture.

■ FINDING 02

Detection outpaces action

Teams identify waste roughly 30 times faster than they fix it. The bottleneck is execution, not awareness.

■ FINDING 03

Three trajectories

Optimizers cut spend 50% in 9 weeks. Drifters inflate 10% a quarter. Scalars grow 4x and bake in waste.

■ FINDING 04

The lens changes the mechanics

Currency exposure, sovereign cloud, and labor economics shape decisions US-centric reports miss.

■ FINDING 05

The GPU shift is next

AI spend is under 2% today. By Q2 2027 it crosses 15%. Same anti-patterns, three more zeros.

17%

RECOVERABLE
WASTE

Of every cloud dollar, provable without architectural change.

10/10

HYPOTHESES
CONFIRMED

Ten falsifiable hypotheses, written before a single dashboard opened.

\$2M

ANNUALIZED
SPEND ANALYZED

Across 25,225 live resources and 32 active cloud regions.

The state of enterprise cloud.

Three views: spend, footprint, and trajectory. AWS still takes two-thirds of every cloud dollar, genuine multi-cloud is 1 in 13, and footprint is now a choice most enterprises never made consciously.

65.5% AWS

1 IN 13 MULTI-CLOUD

THREE ARCHETYPES

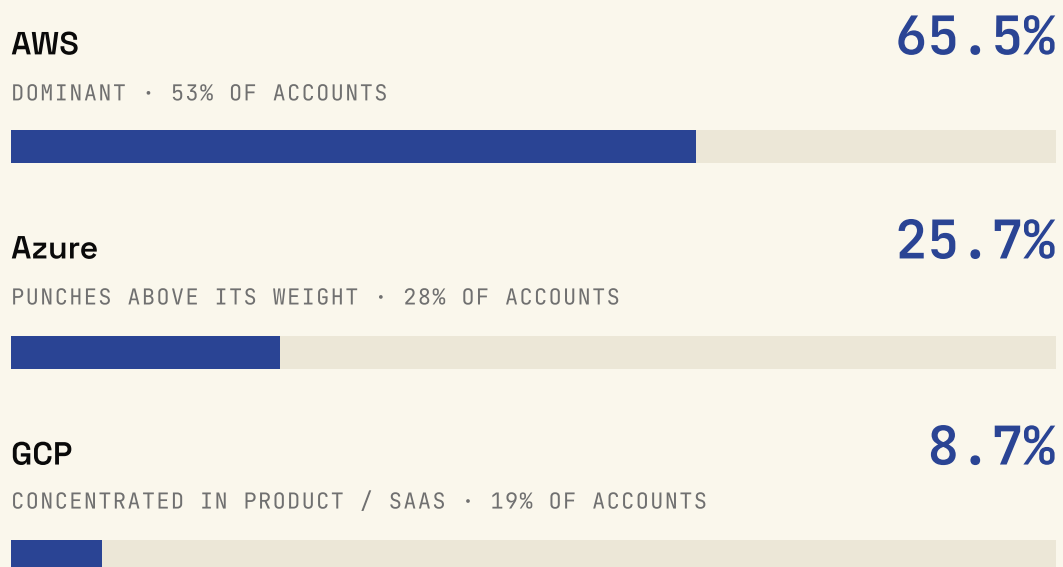
■ 3.1 • SPEND VS MARKET SHARE

Spend tells a different story.

Account count and spend are not the same shape. Azure commands disproportionate enterprise spend on far fewer accounts. GCP is the long tail.

FIGURE 3.1 • SHARE OF SPEND

COHORT TELEMETRY



■ MULTI-CLOUD

1 / 13

Exactly one enterprise in thirteen ran production across all three hyperscalers. The rest are single-cloud: 6 AWS, 4 Azure, 2 GCP.

■ FOOTPRINT IS A CHOICE

32 regions or 3

One firm spread across 32 regions at ~\$60 each. Another concentrated in 3 at ~\$5,900 each. Two patterns are deliberate. Two are accident.

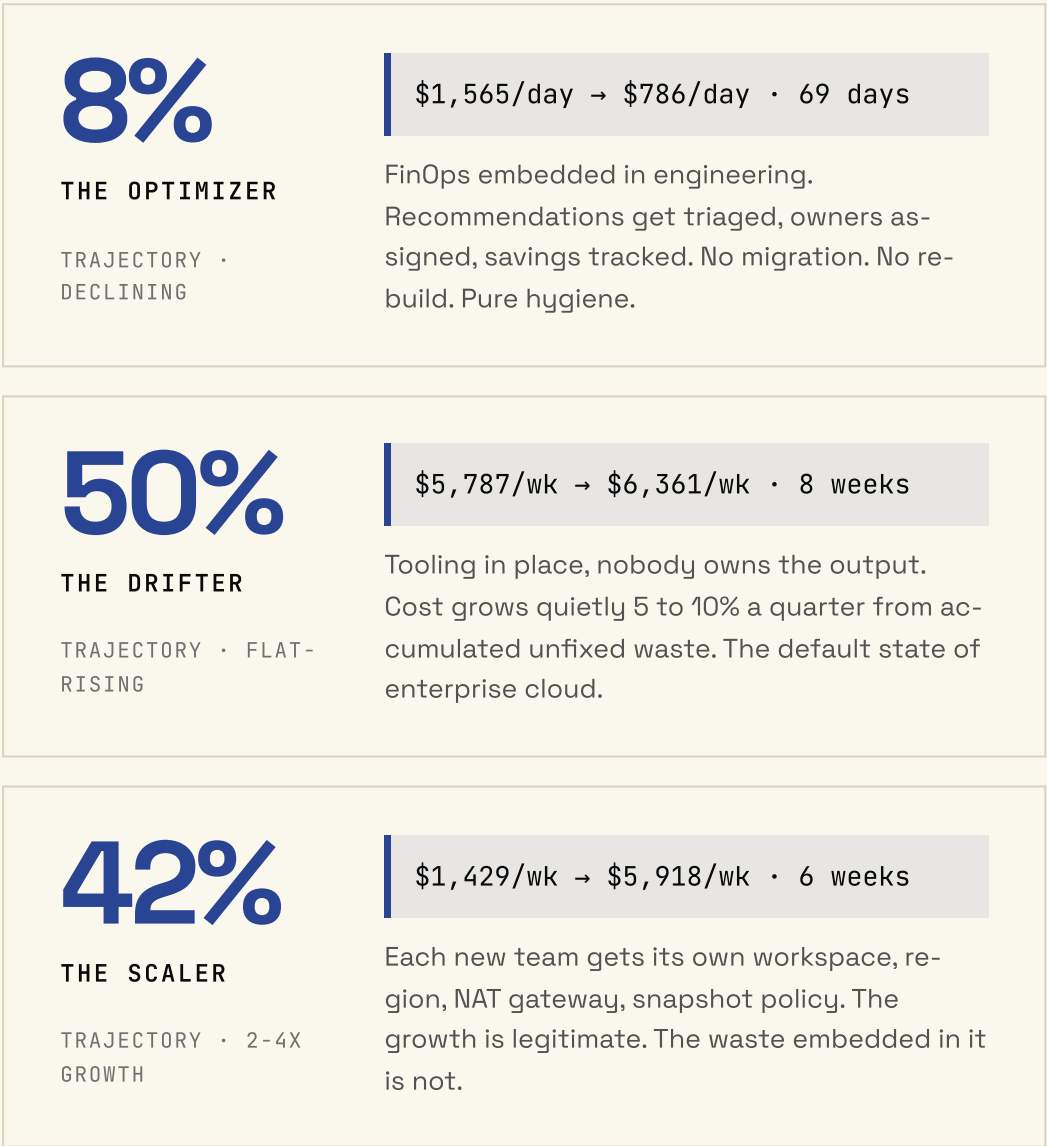
■ THE BIMODAL ECONOMY

The average is meaningless

One customer halves spend while another quadruples it, in the same quarter. Every bill sits on one of three trajectories.

FIGURE 3.2 • THREE TRAJECTORIES, REAL CUSTOMERS

OBSERVED RUN-RATE



Which trajectory are we on, and is it the one we chose?

THE QUESTION EVERY CTO SHOULD ASK

Where the waste lives.

87% of cloud waste is not strategic. It is forgotten. The biggest cloud waste problem is not that you bought the wrong thing. It is that you forgot to delete the right thing.

16.9% RECOVERABLE

87% ORPHANS

FIX 10 → RECOVER 80%

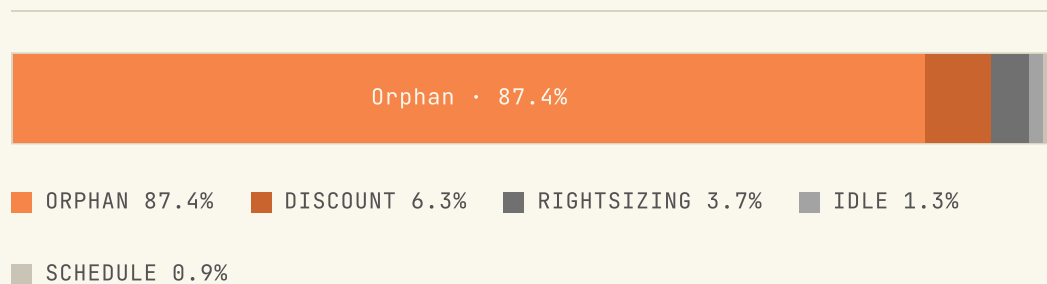
■ 4.1 • THE CATEGORY DISTRIBUTION

The waste is mundane.

Vendor narratives focus on Reserved Instances, Savings Plans, Spot. Those are 6% of the recommendations we flagged. The real waste is things nobody remembers creating.

FIGURE 4.1 • WHERE THE WASTE SITS

SHARE OF FLAGGED ITEMS



87%

OF WASTE IS
ORPHANS

Unattached volumes, orphan snapshots, abandoned IPs. About 5 minutes each to fix.

14x

SNAPSHOTS VS
LIVE VOLUMES

Every dev creates a snapshot before risky changes. Almost no one deletes them.

80%

RECOVERED FROM
10 FIXES

Fix only the top ten anti-patterns and you recover four-fifths of the waste.

■ 4.2 • THE HALL OF SHAME

Fix ten things. Recover 80%.

None of these are strategic decisions to revisit. They are hygiene to install. If your platform team cannot recite this list from memory, you have a 16.9% problem.

■ 01 · ORPHAN SNAPSHOTS

\$80K+

EBS snapshots with no source volume, charged forever. Found in 100% of AWS users.

■ 03 · NON-PROD PREMIUM SSD

\$66K+

Premium SSD in non-prod Databricks on Azure. 100% of Databricks-on-Azure environments.

■ 04 · EC2 OFF PLAN

\$50K+

EC2 not covered by a Savings Plan. Roughly 90% of production fleets.

■ 06 · NO SCHEDULE

\$40K+

Dev and test workloads running 24/7 by default. 100% of dev environments.

■ 02 · UNATTACHED VOLUMES

\$25K+

Single volumes leak ~\$2,500 a year. Found in 100% of AWS users.

**You did not buy the
wrong thing. You forgot
to delete the right
thing.**

CHAPTER 4 • WHERE THE WASTE LIVES

The detection-to-action gap.

Detection has been solved. Execution has not. Teams identify waste roughly 30 times faster than they act on it. The industry spent a decade building detection tools. Action is still an open problem.

DETECTION SOLVED

<1% REMEDIATED

THE GAP IS HUMAN

■ 5.1 • THE FUNNEL

The platform stops at the dashboard.

Fewer than 1% of detected waste signals are formally applied through a remediation workflow. The work happens, or does not, in the cloud console.

FIGURE 5.1 • WHAT ACTUALLY GETS FIXED

ACROSS THE COHORT



<1% FORMALLY REMIEDIATED Of detected waste, applied through a remediation workflow.	80% AUTO-RESOLVES THROUGH CHURN Not intent. Resources disappear because owners leave, not because anyone acted.	30x FASTER TO DETECT THAN ACT The market for FinOps that detects is mature. The market that acts is wide open.
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■ 5.2 • WHY THE GAP EXISTS

All human. None technical.

The Optimizer in our cohort had the same tools as everyone else. Their secret was that someone owned the list, every day, and worked through it.

■ OWNER AMBIGUITY Nobody owns it The account belongs to platform. The workload belongs to the app team. The cost belongs to finance. Nobody owns the recommendation.	■ RISK ASYMMETRY Fear of prod Deleting a snapshot might break something, a visible, personal risk. Not deleting it costs money, a diffuse one. The first wins.	■ NO APPLY-PATH Show, do not do Most FinOps platforms show recommendations. Almost none execute them safely, including, by our own count, ours.
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One Optimizer proved it takes weeks, not tools. They cut daily cloud spend from \$1,565 to \$786 in 69 days. No migration. No re-build. Someone simply owned the list and worked through it, one recommendation at a time.

**The market for FinOps
that detects is mature.
The market that acts is
wide open.**

CHAPTER 5 • THE DETECTION-TO-ACTION GAP

■ RECAP

The core of the report.

Five numbers carry the argument. The conventional wisdom is right. What is missing is the will to act on it.

10/10

hypotheses confirmed. All ten, written before a single dashboard opened, held against the evidence.

16.9%

recoverable waste. The proven floor. The true figure is likely 30 to 40% of cloud spend.

65.5%

of spend on AWS. Genuine multi-cloud is 1 in 13. Footprint is mostly accidental.

<1%

of detected waste is formally remediated. Detection is solved. Action is the open decade.

■ WHAT TO WATCH NEXT

Challenge this report.

The most important thing you can do with this report is contest it. We published the full methodology so you can replicate, challenge, and improve on it. Grounded in telemetry from 25 accounts across 13 firms in India, SEA, the Middle East, and LatAm. Published June 2026.

PUBLISHER

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EDITION

Industry Research · Edition
1

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