

■ ZOPDEV RESEARCH · JUNE 2026

The State of Cloud 2026

An Emerging Markets view of global cloud, read as telemetry.
The report as an instrument panel for the numbers that
matter.



■ STATE OF CLOUD 2026 · LIVE CONSOLE

The State of Cloud 2026. Read it from inside the product.

An Emerging Markets view of global cloud, grounded in primary telemetry from 25 production cloud accounts. This edition renders the report as a live ZopDev console. The numbers are measured, not modeled.

■ 25,225 LIVE RESOURCES ■ 13 FIRMS · 4+ REGIONS ■ 69-DAY WINDOW
■ PUBLISHED JUNE 2026

ANNUALIZED SPEND

\$2.22M

\$2,222,930 across the cohort

RECOVERABLE WASTE

16.9%

\$375,217 proven, annualized

AWS SHARE OF SPEND

65.5%

Two-thirds of every dollar

WASTE THAT IS ORPHANS

87%

Forgotten, not strategic

SYSTEM_STATUS.LOG

● LIVE

Cloud has stopped being new. So why is the bill still a mystery? After fifteen years of migration the question is no longer whether to run on cloud. It is why the bill is what it is, and what it could look like if we treated it like a product. Ten falsifiable hypotheses were written before a single dashboard was opened. All ten were confirmed.

HYPOTHESES

• SYNCED

10/10

Every pre-registered hypothesis confirmed by the evidence. The conventional wisdom is right. The will to act is what is missing.

01

System overview. Three trajectories.

Every enterprise we examined runs on one of three cost trajectories. Most are drifting. A few are cutting. The rest are quietly quadrupling.

• • TELEMETRY • 25 ACCOUNTS

ARCHETYPE • OPTIMIZER

• DECLINING

~8% OF COHORT

\$1,565 → \$786

DAILY SPEND • 69 DAYS • PURE HYGIENE



Active FinOps embedded in engineering. Recommendations get triaged, owners get assigned, savings get tracked. One Optimizer halved daily spend in 9 weeks. No migration. No rebuild. Just hygiene.

~50% OF COHORT

\$5,787 → \$6,361

WEEKLY SPEND · 8 WEEKS · NO LAUNCH



Detection in place, action absent. Cost grows quietly, 5 to 10% a quarter, from accumulated unfixed waste. No new product launch. Nobody owns the output. The default state of enterprise cloud.

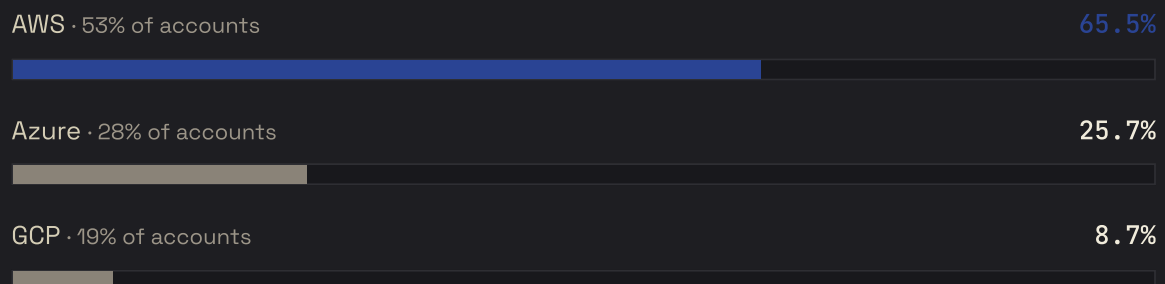
~42% OF COHORT

\$1,429 → \$5,918

WEEKLY SPEND · 6 WEEKS · EMBEDDED WASTE



Growth-stage spending. Each new team gets its own workspace, region, NAT gateway, snapshot policy. The growth is legitimate. The waste embedded inside it is not, and it is baked in for later.



Account count and spend are not the same shape. Azure commands disproportionate enterprise spend on far fewer accounts. AWS still takes two-thirds of every cloud dollar.

The average enterprise cloud bill is a meaningless number. One customer halves spend while another quadruples it in the same quarter.

! THE QUESTION EVERY CTO SHOULD ASK

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

02

The defensible number.

If you take only one statistic from this report, take this one. It is the floor, not the ceiling. We only counted what we could prove.

• • PROVEN • HIGH-CONFIDENCE

16.9¢

of every cloud dollar is recoverable waste, sitting in plain sight, before any architectural change or renegotiation.

Annualized spend · cohort	\$2,222,930
Recoverable savings · proven	\$375,217
Waste-to-spend ratio	16.9%

For an enterprise spending \$10M a year on cloud, that is \$1.69M on the table. Across the near-\$680B global market, the implied addressable waste is north of \$100B annually.

① THIS IS THE FLOOR, NOT THE CEILING

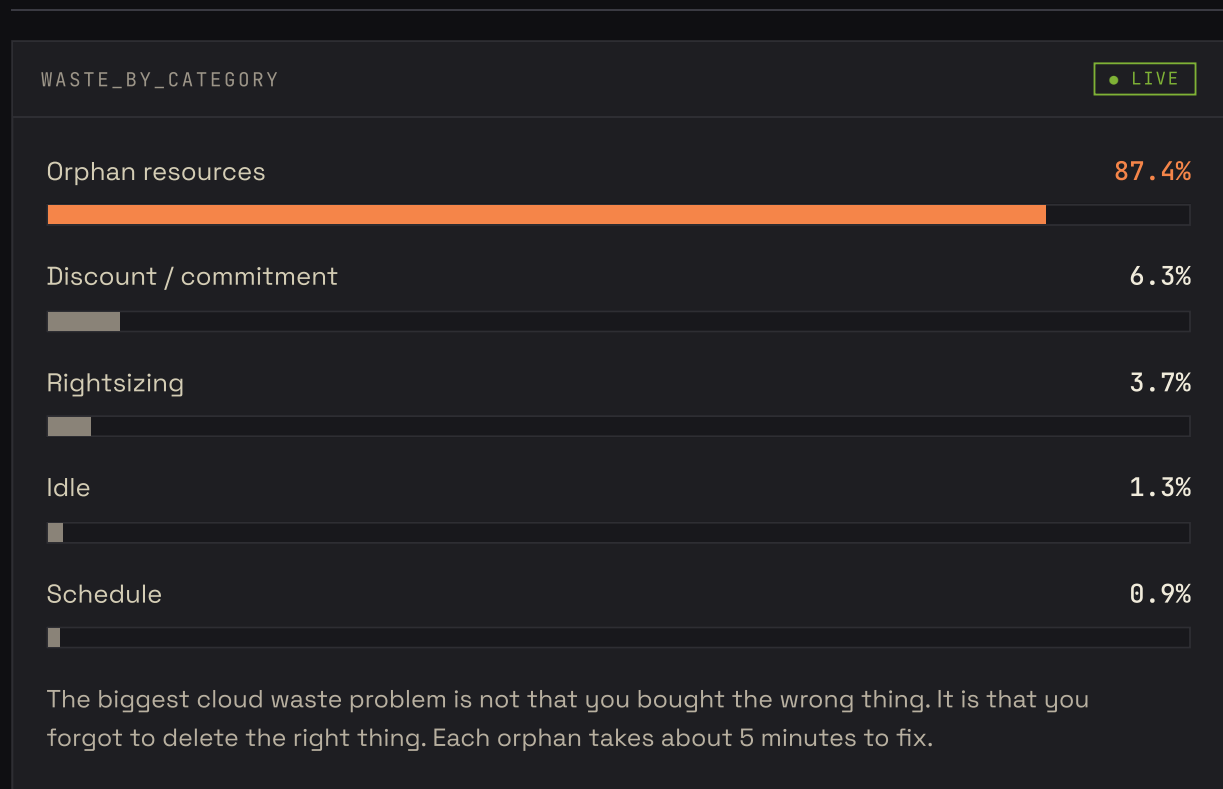
We excluded architectural rebuilds, workload repatriation, commitment renegotiations, and storage-tier migrations without access evidence. Including these would likely double the number. True recoverable waste is probably 30 to 40% of spend. We refuse to claim a number we cannot prove.

03

Waste telemetry. 87% is just forgotten.

Vendor narratives focus on Reserved Instances and Savings Plans. Those are 6% of flagged items. The real waste is mundane: things nobody remembers creating.

● ● 8000+ SIGNALS DETECTED



**Idle compute**

Dev/test running 24/7 by default. 67% savings from scheduling.

\$40K+**Unattached volumes**

Single EBS volumes leak \$2,500/yr. 100% of AWS users.

\$25K+**Forgotten snapshots**

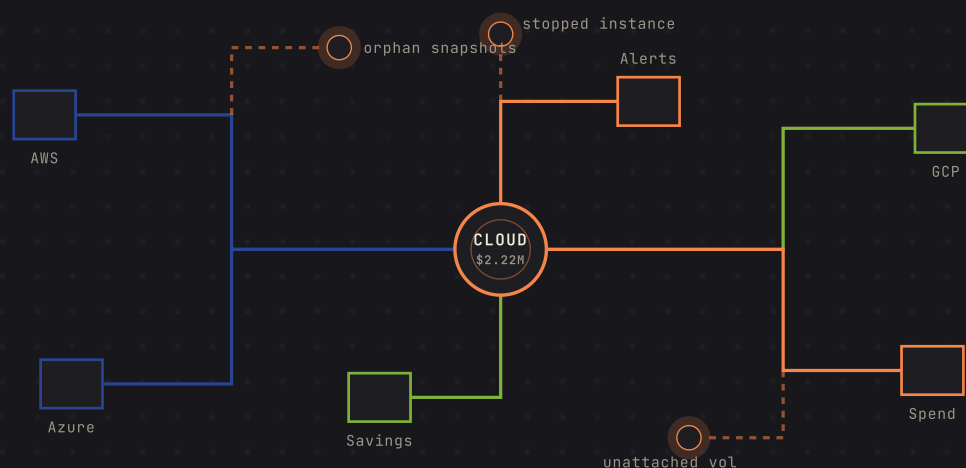
3,807 snapshots in one account. Charged forever.

\$80K+**NAT gateways & snapshots**

Each new Databricks workspace spins up its own.

\$66K+**! SNAPSHOTS COMPOUND SILENTLY**

Every dev creates a snapshot before risky changes. Almost no one deletes them.
Snapshots can exceed live volumes by 14×.



— infrastructure / provider — spend & alerts — savings & outcomes

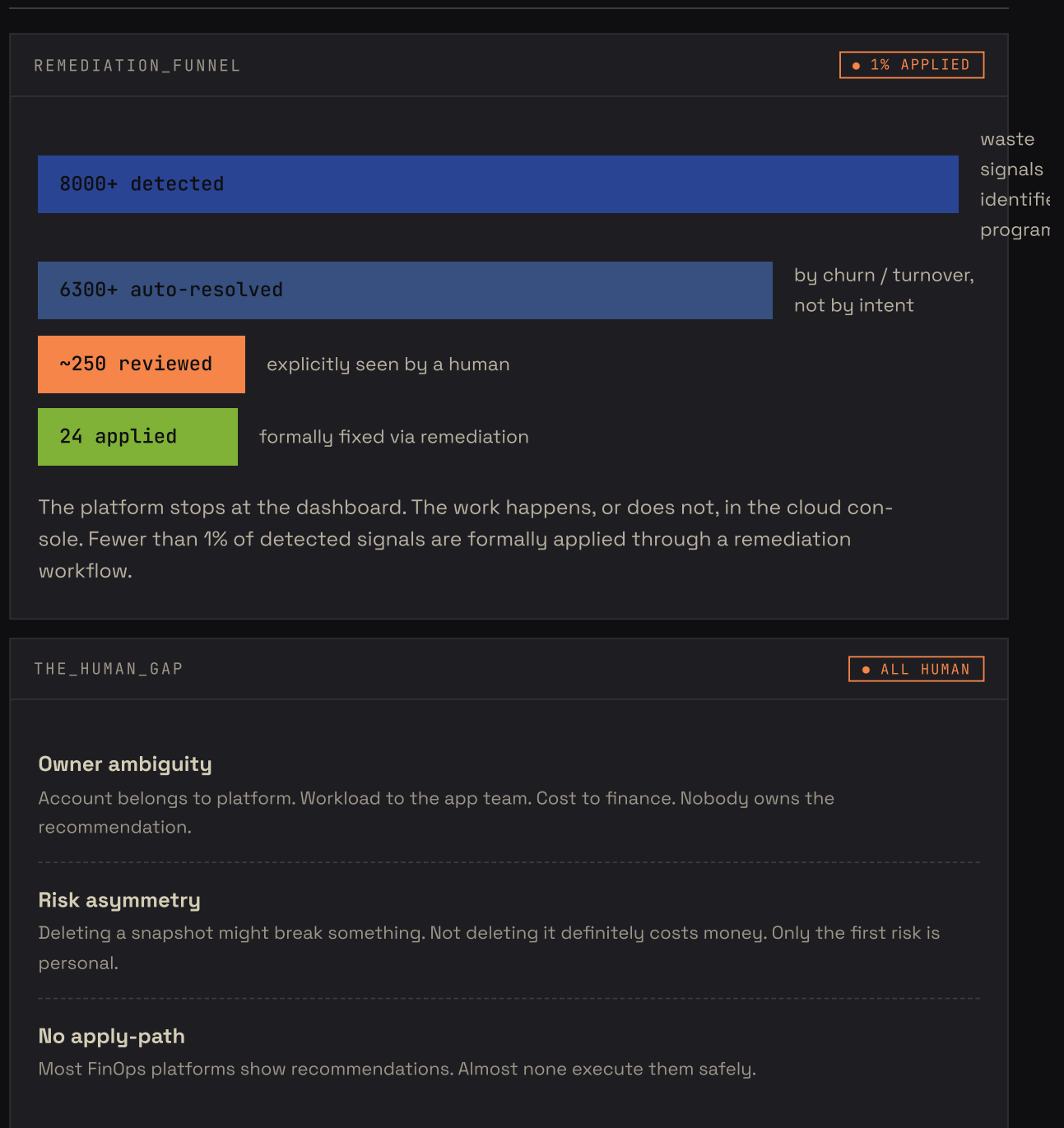
tap an orange orphan node to pulse the leak

04

Detection is solved. Action is not.

Cloud teams identify waste roughly 30× faster than they fix it. The bottleneck is execution, not awareness. The gap is entirely human.

● ● FUNNEL · FINDINGS TO FIXED



1%

of detected waste is formally remediated

~80%

auto-resolves through churn, not intent

30×

faster to detect waste than to act on it

9 wks

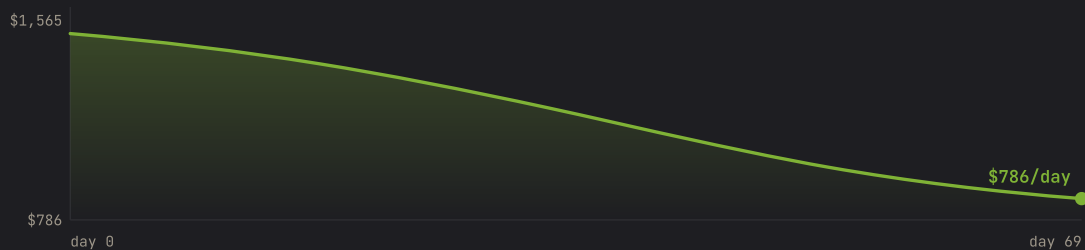
for the Optimizer to halve spend, because
someone owned the list daily

\$/DAY OVER 69 DAYS

DAILY

WEEKLY

MONTHLY



① THE MARKET IS WIDE OPEN

The market for FinOps that detects is mature. The market for FinOps that acts is wide open. The Optimizer's secret was not better detection. They had the same tools as everyone else. Someone owned the list, every day, and worked through it.

05

Architecture signals. Sprawl is the new debt.

The visible compute layer of any production account is dwarfed by its metadata. And the metadata, unlike compute, has no lifecycle.

● ● FOOTPRINT PATTERNS

14×

EBS snapshots vs live volumes

22

CloudWatch alarms per EC2 instance

1 / 13

firms genuinely multi-cloud across all three

6,922

unmonitored alarms in one account, the observability tax

FOOTPRINT_PATTERNS.TABLE

● SYNCED

PATTERN	EXAMPLE	REGIONS	\$/REGION/MO
Global sprawl, one tenant	Sporting goods, Azure	32	~\$60
Concentrated production	Global CPG, Azure	3	~\$5,900
Single-region monolith	Consumer internet, AWS	2	~\$12,500
Spread without intent	E-commerce, AWS	19	~\$560

Two of these reflect deliberate architecture. Two reflect accident. Footprint is a choice, but most enterprises have not made it consciously.

Consolidators

3-5

3-5 large subscriptions. ~\$15-20K/month each. Governance is tractable.

Fragmenters

20-35

20-35 small subscriptions. ~\$500-1,500/month each. Cleanup is hopeless.

One customer ran 33 distinct Azure subscriptions in a single tenant. Another ran 3 for comparable spend. Databricks workspace proliferation is the most visible symptom.

Every AWS enterprise in the cohort had at least one Single-AZ production database. The fix is trivial and the cost is a small storage uptick. The benefit is the difference between a 5-minute outage and a multi-hour one when an AZ fails. The reason is never a deliberate choice. It is always: we ran the migration script in 2021 and never went back.

● ● SINGLE-AZ PROD DB

● ● NO SNS DESTINATION

● ● SNAPSHOTS WITHOUT LIFECYCLE

● ● GRAVITON OPPORTUNITY

06

The lens, and the next shift.

The 16.9% finding holds from Mumbai to Mountain View. How the waste accumulates is what differs by geography. And the next inflection has three more zeros.

● ● CONTRARIAN READ

THE CONSENSUS	THE CONTRARIAN READ
Multi-cloud is the dominant strategy	Only 1 of 13 runs production across all three hyperscalers
Reserved Instances are universally attractive	EM CFOs increasingly avoid 3-year commitments due to FX exposure
AI adoption is universal and accelerating	Under 2% of EM cohort cloud spend on AI services as of June 2026
Cloud migration is the dominant project type	In SEA and LatAm, cloud-native greenfield dominates

GPU_SHIFT · COST OF A FORGOTTEN WEEKEND		● 127×
Idle CPU box		\$37
m6i.4xlarge · ~\$0.77/hour · a weekend forgotten		
Idle GPU cluster		\$4,704
p5.48xlarge, 8× H100 · ~\$98/hour · same mistake		
Today AI/GPU is under 2% of enterprise bills. By Q2 2027 it crosses 15%. The same anti-patterns return with three more zeros on every waste number.		

07

System recap.

Ten hypotheses, all confirmed. One defensible number. Three trajectories. The whole report on one board.

● ● SNAPSHOT

10/10

Every pre-registered hypothesis confirmed. The conventional wisdom is right. The will to act is what is missing.

16.9%

of every cloud dollar is provably recoverable waste. The true figure is likely 30 to 40%.

65.5%

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

87%

of waste is orphans, not architecture. Most enterprises are Drifters, inflating 5 to 10% a quarter without intent.

■ CLOSING · WHAT TO WATCH NEXT

It is not can we cut cloud spend. It is why haven't we already.

16.9% is the headroom you did not know you had. Detection is a solved problem. The bottleneck is ownership. ZopDev closes the detection-to-action gap: someone owns the list, every day, and the fixes actually get applied.

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