

■ ZOPDEV RESEARCH · JUNE 2026

The State of Cloud 2026

An Emerging Markets view of global cloud, read as evidence.
Numbered exhibits, sources, and a running measurement
behind every claim.

An evidence file, read in exhibits.

Most “State of Cloud” reports are written from Silicon Valley, for Silicon Valley. This one is grounded in primary telemetry from 25 production accounts across 13 emerging-market enterprises. A reading excerpt — highlighted rows are reproduced in full below.

—	Executive Summary	IN THIS EXCERPT
01	Hypothesis Scoreboard	IN THIS EXCERPT
02	The Defensible Number	IN THIS EXCERPT • FULL
03	The State of Enterprise Cloud	IN THIS EXCERPT • FULL
04	Where the Waste Lives	IN THIS EXCERPT • FULL
05	The Detection-to-Action Gap	FULL REPORT
06	The Architectural Picture	FULL REPORT
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09	The GPU Shift	FULL REPORT
—	Closing • What to Watch Next	IN THIS EXCERPT

■ EXECUTIVE SUMMARY

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 be on the cloud. It is why the cloud bill is what it is — and what it could look like if we treated it like a product.

■ EXHIBIT 01 The five findings that matter

ONE SCREEN

01 Waste is hygiene, not strategy

16.9% of every cloud dollar is recoverable waste — and 87% of those items are forgotten resources, not bad architectural decisions.

02 Detection vastly outpaces action

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

03 Three personas, three trajectories

Optimizers cut spend 50% in 9 weeks. Drifters grow 10% a quarter without intent. Scalers grow 4× and bake in tomorrow's waste. Most enterprises are Drifters.

04 The Emerging Markets lens reveals different mechanics

Currency exposure, sovereign cloud pressure, and labor-cost economics shape cloud decisions in ways US-centric reports systematically miss.

05 The GPU shift is the next inflection

Today, AI/GPU spend is under 2% of enterprise cloud bills. By Q2 2027 it crosses 15%. The same anti-patterns return — with three more zeros on every waste number.

Source: cohort telemetry · 25 production accounts · 13 enterprises · 69-day window (Mar 20 – May 27, 2026)

■ EXHIBIT 02 The three industry archetypes

EVERY FIRM FITS ONE

THE OPTIMIZER

8%

TRAJECTORY • DECLINING



Active remediation, FinOps embedded in engineering. One Optimizer cut daily cloud spend 50% in 9 weeks — no migration, no rebuild, just hygiene.

THE DRIFTER

50%

TRAJECTORY • FLAT-RISING



Detection in place, action absent. Waste grows quietly, 5–10% a quarter. The recommendations exist; nobody owns them. The default state of enterprise cloud.

THE SCALER

42%

TRAJECTORY • 2–4× GROWTH



Growth-stage spend. New regions, workspaces, accounts every week — each new service spins up its own NAT gateway, scratch volume, snapshot policy.

Source: cohort run-rate classification • shares of the 13-firm cohort, rounded

■ EXHIBIT 03 Methodology at a glance

SIXTY-SECOND VERSION

25

CLOUD ACCOUNTS

13

ENTERPRISES

69

DAYS OBSERVED

32

CLOUD REGIONS

Instruments: native AWS / Azure / GCP resource-discovery & cost APIs + a 315-rule recommendation engine • \$420,554 measured in-window • 36 service types • FMCG, e-commerce, consumer internet, B2B logistics, beverages, creator-economy SaaS

Roughly \$1 in every \$6 of cloud spend is recoverable through hygiene alone.

THE ECONOMICS, IN ONE LINE – BEFORE ANY ARCHITECTURAL CHANGE,
RENEGOTIATION, OR REPATRIATION

Ten hypotheses, written before analysis began.

Most industry reports describe what the data showed. We did the opposite: before opening a single dashboard, we wrote ten falsifiable hypotheses. This is the only honest way to do research. Tap any row for the rationale.

10/10

Every hypothesis — pre-registered before a single dashboard was opened — was confirmed by the evidence. The conventional wisdom about cloud is broadly correct. What's missing is the will to act on it.

H01

AWS dominates enterprise spend, even where account count favors others

✓ CONFIRMED

53% of accounts • 65.5% of spend

Account count and spend are not the same shape. AWS holds 53% of cohort accounts but takes 65.5% of every dollar; Azure punches above its weight on far fewer accounts, and GCP is the long tail concentrated in product and SaaS.

H02

Multi-cloud is rarer than the narrative suggests

✓ CONFIRMED

Only 1 of 13 ran production across all three hyperscalers

Six of thirteen are single-cloud AWS, four single-cloud Azure, two single-cloud GCP. “Multi-cloud strategy” in industry conversation is often code for failover plans nobody tested — parallel production workloads remain rare.

H03

Waste concentration follows a power law

✓ CONFIRMED

76% of savings sit in 3 of 13 environments

Three environments hold three-quarters of the provable savings. Remediation effort should be concentrated where the money is, not spread evenly across the estate.

H04 Orphan resources outnumber strategic waste

✓ CONFIRMED

87% of all flagged items are orphans

Unattached volumes, orphan snapshots, abandoned IPs — forgotten resources, not bad architectural decisions, dominate the waste ledger. Each takes about five minutes to fix.

H05 Customers detect waste 10× faster than they act

✓ CONFIRMED

Actual ratio ~30× — more extreme than predicted

The one hypothesis we under-called. Fewer than 1% of detected waste signals are formally applied through any remediation workflow. Detection has been solved; execution has not.

H06 Dev/test runs 24/7 by default in prod accounts

✓ CONFIRMED

67% potential savings on dev VMs through scheduling

Scheduling alone — nights and weekends off — recovers two-thirds of dev VM cost. Almost no development environment in the cohort had a schedule attached.

H07 Databricks creates a predictable Azure anti-pattern

✓ CONFIRMED

Premium SSD in non-prod • confirmed across 2 enterprises

Every Databricks workspace spins up its own NAT gateway and Premium SSD scratch volumes — including non-production workspaces where Premium storage buys nothing.

H08 EBS snapshot sprawl is the universal AWS cost

✓ CONFIRMED

3,807 snapshots in one customer • orphans in 4 of 6 AWS users

Every developer creates a snapshot before risky changes; almost no one deletes them. Snapshots can exceed live volumes by 14× — charged forever, referenced by nothing.

H09 Most accounts have a Single-AZ production database

✓ CONFIRMED

36+ flagged in one customer • pattern visible everywhere

Not a cost problem — a resilience problem. The reason is never “we made a deliberate choice.” It is always “we ran the migration script in 2021 and never went back.”

H10 AI/GPU spend is still a single-digit share

✓ CONFIRMED

Under 2% of cohort spend on AI services

For now. By Q2 2027 we predict the average bill is more than 15% AI/GPU — driven by inference, not training. The same anti-patterns return with three more zeros.

02

The Defensible Number

If you take only one statistic from this report, take this one.

16.9%

PROVABLY RECOVERABLE

16.9 cents of every cloud dollar is recoverable waste, sitting in plain sight. For an enterprise spending \$10M annually on cloud, that is \$1.69M on the table — recoverable without architectural changes, vendor renegotiations, or workload repatriation.

Across the global enterprise cloud market — near \$680B in 2026 — the implied addressable waste is north of **\$100B annually**. In Indian-rupee terms, the addressable waste at a single mid-sized enterprise can exceed ₹50 crore per year, and the currency conversion makes it sharper: the cloud bill is USD-denominated while the revenue defending it is not.

■ EXHIBIT 04 The derivation

COHORT · ANNUALIZED

ANNUALIZED CLOUD SPEND ·
COHORT

\$2.22M

\$2,222,930 total



RECOVERABLE SAVINGS ·
PROVEN

\$375K

\$375,217 annualized



WASTE-TO-SPEND RATIO

16.9%

$\$375,217 \div \$2,222,930$

Source: cohort telemetry + 315-rule recommendation engine · only high-confidence, provable items counted

■ EXHIBIT 05 This is the floor, not the ceiling

WHAT WE EXCLUDED

We only counted recommendations we could prove with high confidence. We excluded architectural rebuilds, workload repatriation, commitment renegotiations, storage-tier migrations without access evidence, and application-layer efficiency.

Including these would likely double the number — the true recoverable waste is probably 30–40% of cloud spend. But we refuse to claim a number we cannot prove. When we say 16.9%, we mean the central estimate; the true industry-wide value is probably in the 12–22% range.

Method & caveats: Appendix A, C & D of the full report · challenges: contact@zop.dev · 14-day response window

**The boardroom question is not
“can we cut cloud spend?” It is
“why haven’t we already?”**

16.9% IS THE HEADROOM YOU DON'T KNOW YOU HAVE

03

The State of Enterprise Cloud

Three views: spend, footprint, and trajectory.

65.5%

OF SPEND ON AWS

Spend by provider tells a different story than account count. Azure has fewer accounts in our cohort but commands disproportionate enterprise spend. GCP is the long tail. AWS still takes two-thirds of every cloud dollar.

EXHIBIT 06 Share of spend vs share of accounts

FIGURE 3.1 • COHORT TELEMETRY

SHARE OF SPEND

100% = \$2.22M / YR



SHARE OF ACCOUNTS

100% = 25 ACCOUNTS



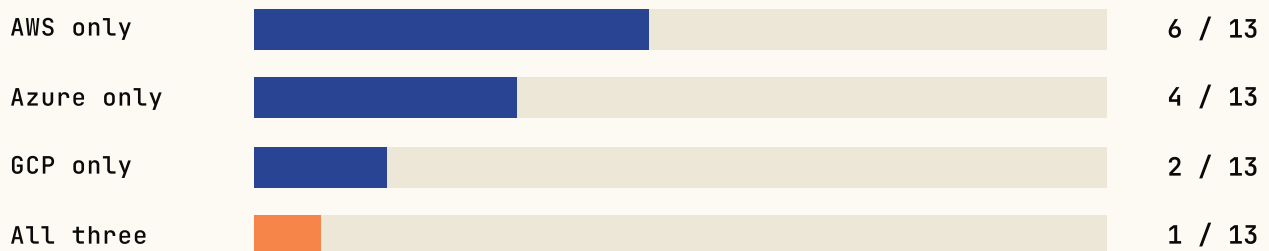
■ AWS — dominant in spend & accounts ■ Azure — punches above its weight

■ GCP — concentrated in product / SaaS

Account count and spend are not the same shape — Azure commands disproportionate spend on far fewer accounts.

EXHIBIT 07 Multi-cloud: more talked about than practiced

N = 13 ENTERPRISES



The “multi-cloud strategy” of industry conversation is often untested failover plans, not parallel production workloads.

FOOTPRINT PATTERN	EXAMPLE (ANONYMIZED)	REGIONS	\$ / REGION / MO
Global sprawl, one tenant	Global 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 patterns reflect deliberate architectural choices. Two reflect accident. Footprint is now a choice — most enterprises have not made it consciously.

3.4

The Bimodal Economy

The most important chart in this report. The average masks the story.

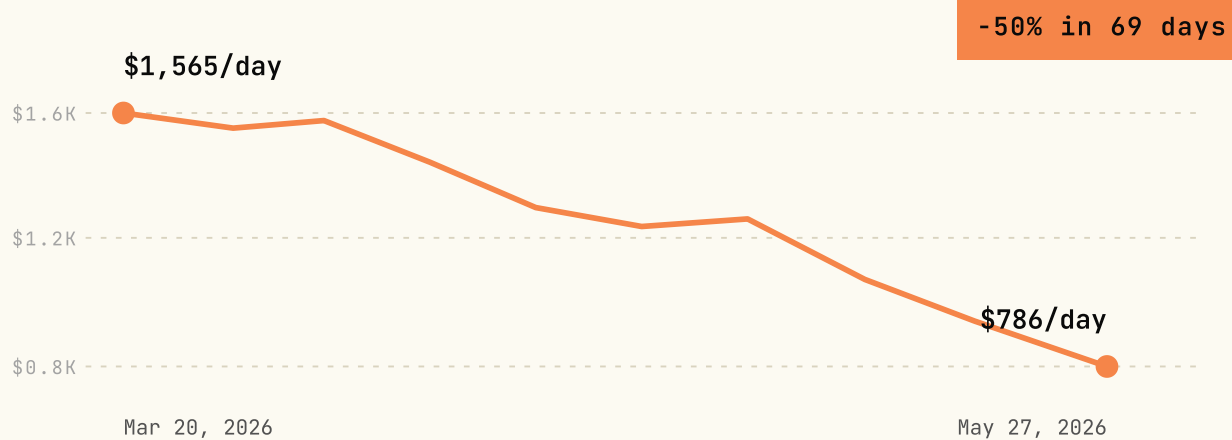
-50%

IN 69 DAYS • ONE FIRM

Some enterprises cut spend by half in a quarter. Others quietly inflate by 4x. Optimizers shed waste fast, Scalers accumulate it fast, Drifters stay stuck in between. Every cloud bill is on one of these three trajectories.

EXHIBIT 09 The Optimizer — daily spend, observed

FIGURE 3.2A • REAL CUSTOMER



Active FinOps embedded in engineering: recommendations triaged, owners assigned, savings tracked. No migration. No rebuild. Pure hygiene.

EXHIBIT 10 Three trajectories, real customers

FIGURE 3.2B • OBSERVED RUN-RATE

-50%

THE OPTIMIZER • DAILY SPEND

\$1,565 → \$786 • 69 days • pure hygiene

+10%

THE DRIFTER • WEEKLY SPEND

\$5,787 → \$6,361 • 8 weeks • no launch, just drift

4.1x

THE SCALER • WEEKLY SPEND

\$1,429 → \$5,918 • 6 weeks • legitimate growth, embedded waste

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?

CHAPTER 03 • THE BIMODAL ECONOMY

04

Where the Waste Lives

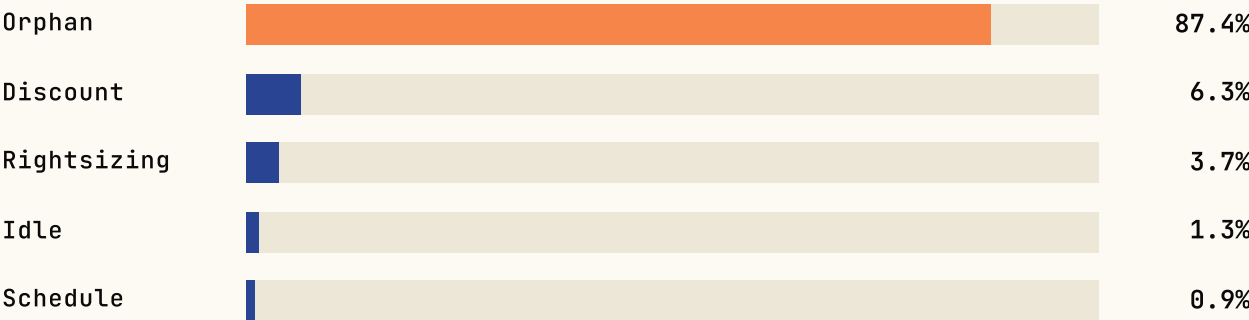
87% of cloud waste isn't strategic.
It's forgotten.

87.4%

OF FLAGGED ITEMS ARE ORPHANS

Vendor-led narratives focus on big strategic moves — Reserved Instances, Savings Plans, Spot. These account for only 6% of the recommendations we flagged. The real waste is mundane: things nobody remembers creating.

■ EXHIBIT 11 The waste category distribution FIGURE 4.1 • SHARE OF FLAGGED ITEMS



The biggest cloud waste problem isn't that you bought the wrong thing. It's that you forgot to delete the right thing.

01 Provision generously, clean up rarely

The friction of provisioning is near zero; the friction of de-provisioning is enormous.

02 No one owns the lifecycle

Accounts are organized by team, environment, or application. Almost never by lifecycle.

03 Snapshots compound silently

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

Source: recommendation engine • 315+ rules applied uniformly across all 25 accounts

■ CHAPTER 04 • CONTINUED

The hall of shame.

Fix only these ten things, and you recover 80% of the waste. None are strategic decisions to revisit — they are hygiene to install.

■ EXHIBIT 13 Top 10 anti-patterns by dollars at stake

80% OF THE WASTE

#	ANTI-PATTERN	UNIVERSALITY	\$ / YR AT STAKE
01	Orphan EBS snapshots — no source volume, charged forever	100% of AWS users	\$80K+
02	Unattached EBS volumes — single volumes leak \$2,500/yr	100% of AWS users	\$25K+

#	ANTI-PATTERN	UNIVERSALITY	\$ / YR AT STAKE
03	Premium SSD in non-prod Databricks (Azure)	100% of Databricks on Azure	\$66K+
04	EC2 not covered by Savings Plans	~90% of prod fleets	\$50K+
05	Single-AZ production RDS — not cost, risk	Every AWS enterprise	Resilience risk
06	Dev/test workloads with no schedule	100% of dev environments	\$40K+
07	Windows VMs not using Azure Hybrid Benefit	Common in regulated industries	40% on license
08	On-demand for stateless / batch workloads	Common in cloud-native shops	\$30K+
09	x86 where Graviton/ARM would work	80% of compute fleets	\$25K+
10	Stopped instances still incurring EBS charges	Found in every account	\$5K+
If your platform team cannot recite this list from memory, you have a 16.9% problem.			

■ RECAP • THE EVIDENCE SO FAR

Four numbers to carry into the boardroom.

10/10

HYPOTHESES
CONFIRMED

All ten pre-registered hypotheses confirmed. The conventional wisdom is right — the will to act is what's missing.

16.9%

RECOVERABLE WASTE

Provably recoverable today, without architectural change. The true figure is likely 30–40%.

65.5%

OF SPEND ON AWS

Genuine multi-cloud is 1 in 13. Footprint is mostly accidental — a choice most firms haven't made consciously.

87.4%

OF WASTE IS ORPHANS

Forgotten resources, not strategy. Fixing ten anti-patterns recovers ~80% of the total.

Three trends. Three counter-trends. One bet.

One bet, willing to be publicly wrong: by the 2027 edition, more than half of our cohort will have crossed into Optimizer territory — not because tooling improved, but because the next downturn made cloud cost a board priority. The bet is on the cycle, not the technology.

THREE TRENDS	▲ RISING	THREE COUNTER-TRENDS	▼ COUNTER
01	GPU spend crosses 15% of enterprise cloud, up from under 2% today.	01	Repatriation gains traction for steady-state workloads in currency-pressured economies.
02	Auto-remediation displaces detection-only tooling in procurement.	02	EM enterprises increasingly question 3-year RI commitments on FX exposure.
03	Sovereign cloud becomes board-level globally, not just in Europe.	03	“Quiet” Drifter cost growth outpaces flashy AI bills as the dominant budget overrun.

“The most important thing you can do with this report is **challenge it.**” We published our methodology so you can replicate, contest, and improve on it.