The Trends

Entrants make up a large majority of FinOps companies. Incumbents are quickly acquiring these solutions and incorporating them into their vast cloud stack. We expect few entrants to remain in 18-24 months.

Companies

Cost analysis and reporting encompasses multiple sub-categories, with cloud being most crowded and Kubernetes limited to a select few. Optimization of resources is more complex, which naturally limits the playing field.

Maturity

Most organizations have some or most of their infrastructure and applications in the cloud and SaaS sprawl is a real issue. Many have begun their journey to reduce costs and optimize. We do not expect this trend to slow for many years, if ever.

Investment

Venture funding is low for new-comers, but was moderate 4-5 years ago. Most VCs have already backed their players in this space.

The Players

Kubernetes

<table>
<thead>
<tr>
<th>harness</th>
<th>Densify</th>
<th>DATADOG</th>
<th>anodot</th>
<th>CloudNatix</th>
<th>Fairwinds</th>
<th>kubecost</th>
<th>NetApp</th>
<th>CLOUDZERO</th>
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Cloud

|---------|---------|-----------|--------|--------|--------|-----------|----------|-----------|-----|-----------|-------------|-------------|----------|---------|------|------|------|------|------|

SaaS

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<th>LeanIX</th>
<th>zluri</th>
<th>Productiv</th>
<th>cloudeagle</th>
<th>IBM</th>
<th>Cledara</th>
<th>Torii</th>
<th>SaaStrify</th>
<th>Cloudability</th>
<th>vendr</th>
<th>Beamly</th>
<th>SpendFlap</th>
<th>yotascaler</th>
<th>VMware</th>
<th>Tecsys</th>
<th>Yeovia</th>
<th>Zoho</th>
<th>ZVR</th>
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