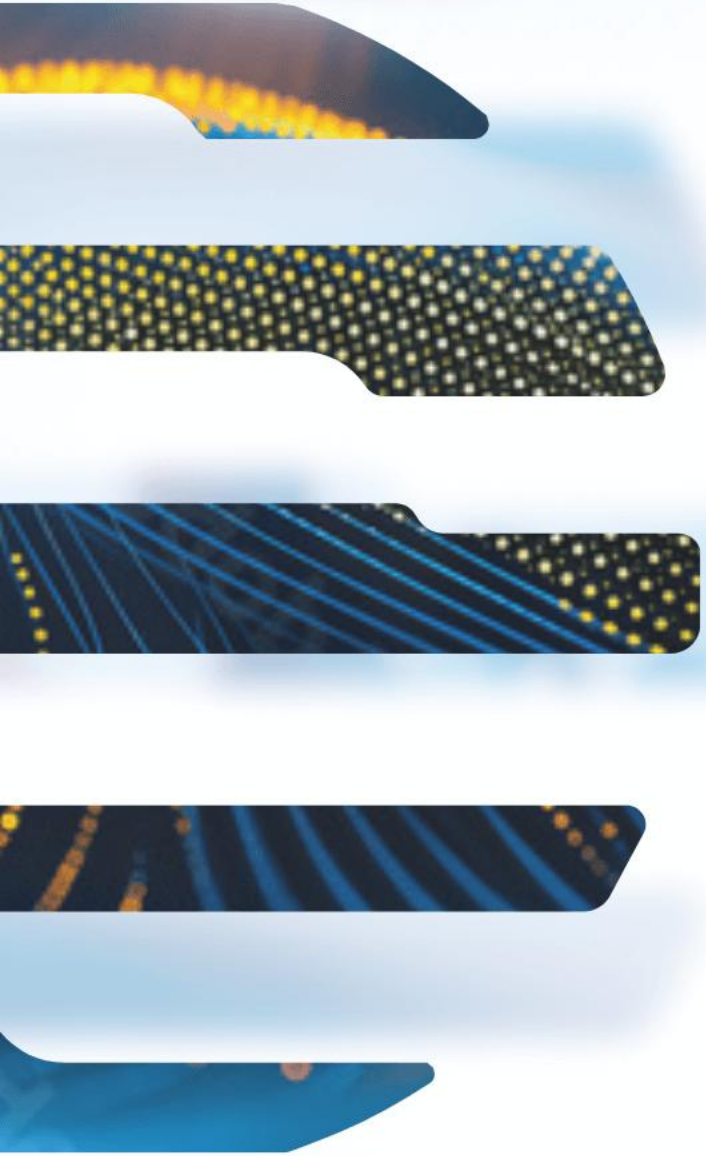


IDC Innovators: FinOps and Cloud Cost Transparency, 2025

THIS IDC INNOVATORS EXCERPT FEATURES KION

Jevin Jensen, Research VP

January 2025

In this Excerpt

The content for this excerpt was taken directly from IDC Innovators: FinOps and Cloud Cost Transparency, 2025 (Doc # US52809425).

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Synopsis

This IDC Innovator presentation identifies four vendors developing innovative software solutions to help enterprises optimize and prioritize cloud investments.

These vendors are adding innovative features such as generative AI and next-generation container optimization to help FinOps teams proactively control cloud costs. Improving cost optimization recommendations and reducing complexity are capabilities that many enterprises are looking for. FinOps teams can free up valuable funds for future investments by maturing their processes and being more proactive.

"The adoption of FinOps in the past four years rivals nearly any IT trend over the past quarter century. Teams need effective tools to manage and mature a FinOps practice. Today, another hot trend, generative AI, is improving FinOps solutions rapidly so enterprises can maximize their cloud investments."

Jevin Jensen
Research VP
Intelligent Cloud Operations and Edge with FinOps

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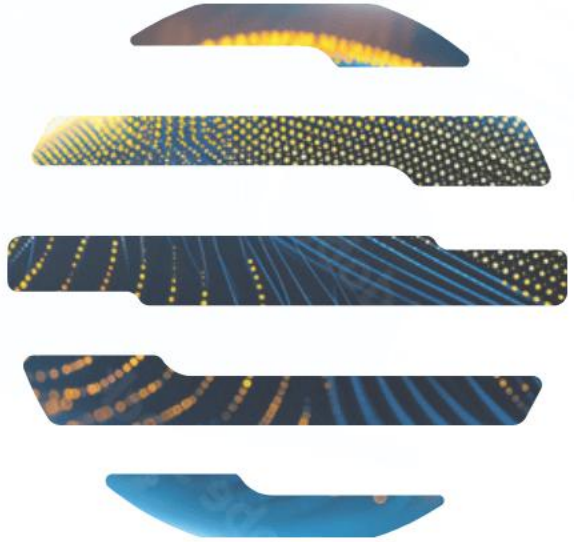
Executive Summary

IDC released the second IDC Market Glance (see *IDC Market Glance: FinOps Cloud Transparency, 2Q24,* IDC #US51551924, June 2024) and fourth vendor market share for FinOps and cloud cost transparency (see *Worldwide Cloud Cost Transparency Software Market Shares, 2023: Growth, New Entrants, and Acquisitions Increase Rapidly,* IDC #US52655424, October 2024) in 2024. The overall market has only a handful of large vendors and over 80 smaller ones. In the past, IDC has noted that the healthy rate of start-ups, new entrants, and acquisitions is driving the overall market higher. Innovative vendors are adding machine learning (ML), AI, generative AI (GenAI), and workload automation to attract new customers.

Complexity and cloud costs can hinder enterprises' efforts to increase agility and grow revenue. FinOps teams and processes can help organizations control their cloud costs and prioritize future cloud investments. However, an effective tool can help hold teams accountable for their cloud spending.

The IDC Innovators document recognizes vendors that exhibit innovative technology or business models, have annual revenue under $100 million, and solve IT buyer challenges. The vendors highlighted in this presentation address specific market needs with unique solutions, including cloud application optimization, innovative use of AI and ML to improve cloud cost recommendations, simplified cloud governance, and container-specific solutions. These vendors offer unique solutions that address current market gaps and support the evolution of the FinOps and cloud cost transparency market.

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VENDOR PROFILE

Kion

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Vendor Profile: Kion

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Founded
2018

Number of Employees
50+

Headquarters
Columbia, Maryland

Founders
Brian Price, CEO and cofounder

Product/Service Description
Kion automates CloudOps with a single platform for policy-based cloud identity, FinOps, and compliance for multicloud. Combining CloudOps and FinOps helps eliminate risk, securing your cloud and your budget.

Funding
$15 million

Source: IDC, 2025

Why Kion Was Chosen as an IDC Innovator

Kion was chosen as an innovator in the marketplace because of its commitment to supporting the growing and evolving cloud market. Recognizing the transformative nature of cloud operations, Kion actively enhances its robust platform to meet these changing needs, such as the demand for GenAI implementation and its focus on cloud cost management driven by the rapid rise in the adoption of FinOps. Many solutions in the market specialize in only one aspect of cloud operations, such as financial management or identity and access management, forcing organizations to piece together solutions. Kion consolidates all necessary cloud governance and management tools into a single platform. IDC agrees that proper cloud governance is essential to maturing an enterprise's FinOps teams. This will ensure that companies can hold teams accountable and deliver on business results while maximizing cloud investments.

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Vendor Profile: Kion

Innovator Assessment

1

Support for Cloud Governance

Kion's focus on comprehensive cloud governance can help companies rapidly mature their FinOps teams. Many companies struggle with maturing their processes after the initial easy wins. Kion brings multiple capabilities together to enable teams to proactively plan and improve future forecasts, not just optimize spending one time.

2

Generative AI

IDC believes 2025 will be the year of AI for FinOps and FinOps for AI. Kion is focused on the latter. By helping teams implement AI in the cloud in a cost-effective and performance-optimized manner, enterprises can successfully implement AI for their applications quicker and see faster return on investment (ROI). Customers tell IDC that the lack of measurable ROI for AI applications is a key hurdle — one that Kion can help solve.

3

Tool Consolidation

With over 90 FinOps vendors tracked by IDC currently, tool sprawl is possible in this space. In fact, 30.8% of enterprises tell IDC they have more than one paid FinOps tool. Kion's strategy to provide a comprehensive solution to bring multiple tools together means enterprises can consolidate their FinOps tools without losing capabilities. This makes adoption easier and reduces training costs for companies. By getting the tool into the hands of IT and line-of-business owners, companies can mature FinOps more rapidly.

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Vendor Profile: Kion

Key Differentiators

Focus on the Comprehensive Platform Solution to Mature FinOps Teams

By taking a holistic approach to FinOps, Kion can provide an end-to-end solution for enterprises looking to improve their FinOps practices. This includes a unique “governance by default” approach that brings identity, compliance, and costs together so that FinOps teams can successfully manage their entire cloud landscape. This integration enables guardrails to aid companies in security and financial controls.

Visibility and Advanced Automation

Kion integrates cloud operations and cloud FinOps into one tool, improving efficiency and reducing complexity. The tool automates recommendations for cost savings across multiple clouds, reducing manual work. Visibility into both security and financial costs improves compliance and helps enterprises track return on investment. When multiple teams in operations and finance use the same tool, collaboration and innovation are improved.

Customer Service

As a smaller firm, Kion can focus on providing excellent customer service. It uses a dedicated support team for each customer to maximize the value of their tool and ensure broad adoption. Quick answers to support questions mean that FinOps teams return to working and getting value from the platform.

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Vendor Profile: Kion

Challenges

Platform Selling

Kion operates in a fragmented and crowded FinOps space with more than 80 similar-sized vendors. As a platform solution with comprehensive capabilities, it can be difficult to sell to C-level executives the value of a single platform. Others in IT and finance may already have a preferred niche tool in place that Kion must displace. It is critical to get leadership buy-in for its solution to be successful.

Budgeting and Forecasting

Kion offers the ability to track against the forecast and accept input from a company's budget process. However, enterprises can vary significantly in budget and forecast processes. It may be a challenge to manage these expectations while simultaneously providing support for Kion's platform solution. Inaccurate forecasts can hurt a vendor's reputation, even when the issue is not with the platform itself.

Unexpected Competition

As Kion moves up in the market, it may face competition from unexpected players such as ERP and fintech. These providers have entrenched relationships with finance group leaders and may oppose a FinOps or cloud platform. These companies have much larger revenue than Kion and may require a partnerships approach rather than competition.

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Technology Definition

Enterprises leverage FinOps and cloud cost transparency software to optimize their cloud resources, applications, and spending. Increasingly, AI and machine learning are used to identify anomalies and find the best possible recommendations for performance and cost configuration optimization. Cloud cost and management are complex, so FinOps teams rely on these tools to maximize their investments and allocate costs appropriately.

As cloud workloads and migrations change over time, the number of containerized and AI-enabled business applications will increase. FinOps software must evolve to handle these more complex solutions by providing automation and simplified management.

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IDC Innovators Inclusion Criteria

An "IDC Innovators" document recognizes emerging vendors chosen by an IDC analyst because they offer an innovative new technology or a groundbreaking business model, or both, and were approved by the IDC Innovators Review Process. It is not an exhaustive evaluation of all companies in a segment or a comparative ranking of the companies.

An IDC Innovators document highlights vendors that meet the following criteria:

- In IDC's opinion, the company exhibits innovative technology or a new business model.
- The company's annual revenue is under $100 million at the time of selection.
- Customers are currently using the company's products and services (i.e., the products and services are not conceptual or in the process of being released).
- The product, service, or business model must solve or help to alleviate an IT buyer challenge.

In addition, vendors in the process of being acquired by a larger company may be included provided the acquisition is not finalized at the time of publication of the document. Vendors funded by venture capital firms may also be included even if the venture capital firm has a financial stake in the vendor's company.

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Related Research

Document Title	Document Title	Publication Date
Worldwide Cloud Cost Transparency Software Market Shares, 2023: Growth, New Entrants, and Acquisitions Increase Rapidly	IDC #US52655424	October 2024
IDC Market Glance: FinOps Cloud Transparency, 2Q24	IDC #US51551924	June 2024

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Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
508-872-8200
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