

STR/VE Public Research

presented at **apidays**

“Building global infrastructure from India”

2022



Part 1

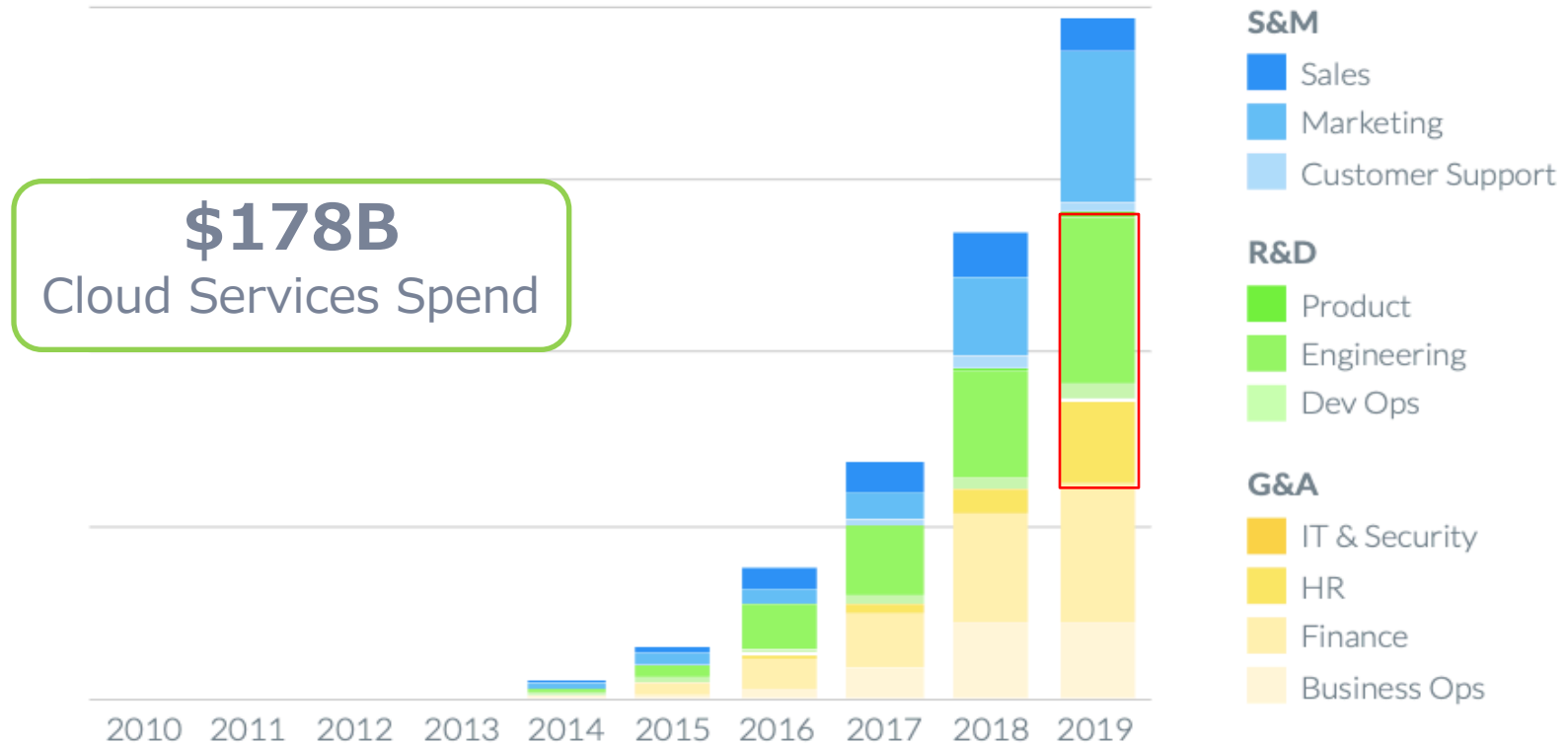
Macro

Global Cloud Services Spend

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Spending on dev infra is one of the largest and fastest growing segments in SaaS

SaaS Spending by Department



112% NDR



135% NDR

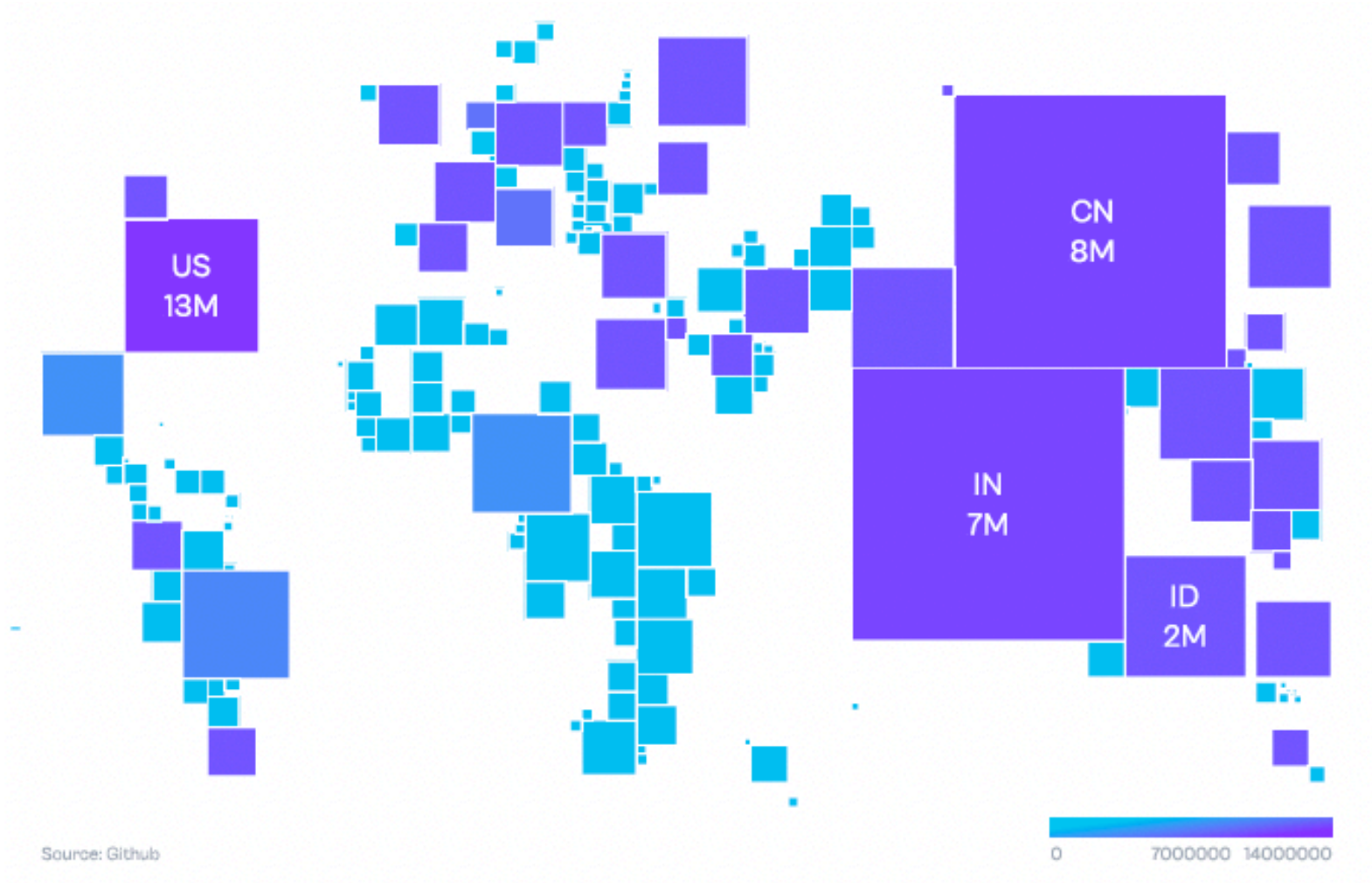


130% NDR

Global Github Users

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While centre of gravity for developers is shifting towards South Asia



Part 2: Micro

Indian DevInfra Companies by Funding

STRIVE

8 Unicorns and multiple Growth-stage startups in dev infrastructure sector in India

Unicorns



Raised > \$20M

(or valued at \$100M+)



Raised > \$1M




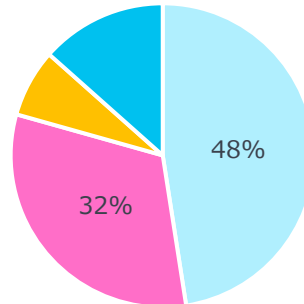
Evolution 3: GTM


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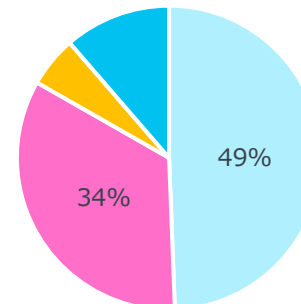
As markets mature, companies are evolving from Inside-Sales to Product-led to Community-led

Sales-led
Growth

 **freshworks**
3507 employees

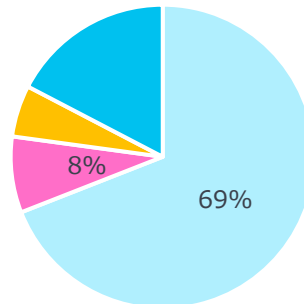


 **BrowserStack**
573 employees

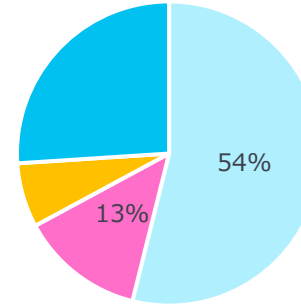


Product-led
Growth

 **zoho**
8718 employees

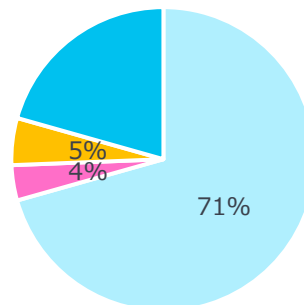


Wingify
219 employees

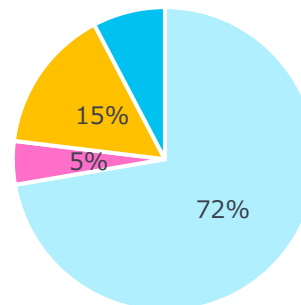


Community-led
Growth

 **POSTMAN**
320 employees



 **HASURA**
65 employees



■ R&D ■ Sales ■ Marketing ■ Others

Growth of Dev Infra

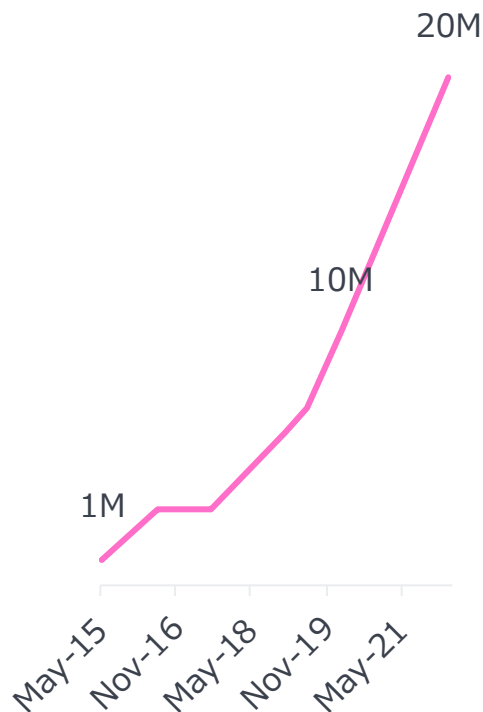
STRIVE

Bottom-up global dev community adoption leading to category creation happening from India



API Management Platform

Developers



GraphQL API engine

Docker Pulls



Source: PRWeb

Part 3

Future

Dev Ecosystem – Work Ahead

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3 areas we need to focus on if India has to become a global leader in dev infra

1. Mission-Critical Infrastructure

2. Talent Development

3. Global Ecosystems

1. Mission-Critical Infrastructure

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Dev Environments

RUN [X]

Remix

 **supabase**

Data Access

 **n8n.io**

 **AIRBYTE**

 **HASURA**

MLOps

 **cube**

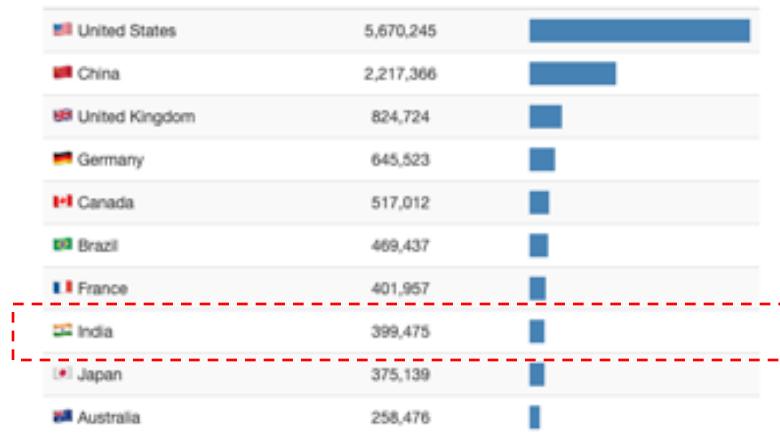
 **FEAST**

 **Amundsen**

2. Talent Development

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Open-Source Contribution



Marketing and Tech Specialization

LinkedIn Top 15 Emerging Jobs

- | | | | | | |
|----|----------------------|-----|---------------------|-----|--------------------------|
| #1 | Blockchain Developer | #6 | Growth Manager | #11 | Cybersecurity Specialist |
| #2 | AI Specialist | #7 | SRE | #12 | Python Developer |
| #3 | Javascript Developer | #8 | Customer Success | #13 | Digital Marketing |
| #4 | RPA Consultant | #9 | Full Stack Engineer | #14 | Front-end Engineer |
| #5 | Back-end Developer | #10 | Robotics Engineer | #15 | Lead-Gen Specialist |

3. Global Ecosystems

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India US corridor



Accel atoms

nexus
venture partners

SI SaaS Insider

India APAC corridor

SURGE  **STR/VE** **SaaSStock** ..

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“Let’s Build”

