



EVEDY™

AI Control Suite

Market Assessment

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Executive Summary

Enterprise AI spending will reach **\$2 trillion globally in 2026** (Gartner), yet fewer than 15% of deployed AI agents have full security and governance approval. This gap between deployment velocity and governance maturity is the market EVEDY addresses. Regulatory enforcement — led by the EU AI Act — is converting governance from a best-practice recommendation into a board-level mandate with fines up to **€35 million or 7% of global revenue**.

1. Macro Market — Enterprise AI Spending

Metric	Value	Source
Global AI spending 2026	\$2 trillion	Gartner (Sep 2025)
AI infrastructure spending 2026	\$487 billion (53% YoY growth)	IDC
Enterprise AI solutions spending 2025	\$307 billion → \$632B by 2028	IDC
US AI market 2026	\$300 billion (40% annual growth)	IDC
AI infrastructure 2029 forecast	>\$1 trillion	IDC

Key takeaway: For every \$100 spent on AI, less than \$1 is currently spent on AI governance. As regulation takes effect, governance spending must accelerate disproportionately — creating a wedge opportunity for purpose-built platforms.

2. AI Governance Platform Market (TAM)

Research Firm	Market Size 2025	CAGR	Forecast
Grand View Research	\$308 million	36.0%	\$3.6B by 2033
Precedence Research	\$309 million	34.3%	\$5.9B by 2035
IMARC Group	\$353 million	35.3%	— by 2034
Fortune Business Insights	\$249 million	25.3%	\$2.1B by 2034
Gartner (AI TRiSM)	\$3.1 billion	35.0%	\$13.8B by 2030
IDC (AI Gov Platforms)	\$2.5 billion	42.0%	\$15.5B by 2030

Note: Gartner’s AI TRiSM (Trust, Risk and Security Management) definition is broader than pure governance and includes security tooling. The narrower “AI Governance Platform” segment sits at ~\$300M in 2025 but grows faster than the overall AI market.

EU AI Act Compliance Sub-Segment

Metric	Value	Source
EU AI Act Compliance Solutions Market 2026	\$609 million	Dimension Market Research
Forecast CAGR	37.3%	—
2035 projection	\$10.5 billion	—
Enterprise AI Gov & Compliance 2026	\$2.55 billion	Future Market Insights
EU compliance market by 2030	€17B–€38B	European Commission estimates

3. Demand Drivers

3.1 Regulatory Pressure

Regulation	Status (April 2026)	Penalty
EU AI Act — Prohibited practices	In force since Feb 2025	€35M or 7% revenue
EU AI Act — High-risk systems	In force from Aug 2026	€15M or 3% revenue
EU AI Act — Misleading information	In force from Aug 2026	€7.5M or 1.5% revenue
GDPR (AI-related)	Ongoing enforcement	€20M or 4% revenue
Australia — Mandatory Guardrails	Legislation pending	TBD
US — NIST AI RMF	Voluntary but referenced in procurement	N/A
UK — FCA/PRA AI guidance	Effective	Regulatory sanctions

Cumulative GDPR fines have reached **€7.1 billion** as of early 2026. The EU AI Act penalty structure **exceeds GDPR** — creating stronger urgency for compliance tooling.

Finland became the first EU member state with full AI Act enforcement powers in December 2025. Multiple investigations are underway for workplace emotion recognition and social scoring.

3.2 Enterprise Adoption Gap

- **81% of AI agents** are beyond planning and in operation (Feb 2026 survey)
- Only **14.4%** have full security approval
- Guarded agent deployments expected to reach **40–60% of large enterprises** by late 2026 (Forrester)
- Compliance budgets increased **30% across large providers** during 2025 (Gartner)
- Average initial compliance cost per high-risk AI system: **>€50,000** (excluding ongoing monitoring)

3.3 Analyst Predictions

- **Gartner:** By 2030, 50% of AI agent deployment failures will be due to insufficient runtime enforcement
- **Gartner:** Through 2026, 80%+ of unauthorized AI transactions caused by internal policy violations (not external attacks)
- **Gartner:** AI TRiSM will reach mainstream adoption within 5 years
- **Forrester:** AI governance elevated from best practice to board-level imperative

4. Competitive Landscape

4.1 Funded Competitors

Company	Focus	Total Funding	Key Facts
Holistic AI	AI governance platform, auditing	\$200M+	Founded by DeepMind alumni; mapping, inspection, regulatory reporting
Credo AI	Policy-based governance	\$41.3M	OEM partnership with IBM watsonx.governance; Policy

Fairly AI / Asenion	GRC for AI	~\$3.4M	Packs engine IBM watsonx.ai integration; acquired anch.AI (Sweden) in 2025
IBM watsonx.governance	Enterprise AI lifecycle governance	(IBM corporate)	Forrester Wave Leader Q3 2025; lifecycle, risk, security, compliance
OneTrust	Privacy + AI governance	\$920M+	GRC platform extending into AI governance

4.2 Runtime Enforcement Consolidation (2025)

The runtime enforcement layer experienced significant M&A activity in 2025:

Acquisition	Acquirer	Date	Significance
Lakera Guard	Check Point	Sep 2025	Real-time AI security firewall → absorbed into security portfolio
Protect AI Guardian	Palo Alto Networks	Jul 2025	Runtime protection → absorbed into PANW security suite
CalypsoAI	F5	2025	Content filtering → absorbed into app delivery portfolio

Implication for EVEDY: Point solutions are being absorbed by large security vendors. The market gap is for **integrated governance + runtime enforcement** — a control plane that combines compliance management (policies, frameworks, audit) with real-time guardrails (jailbreak, toxicity, grounding). This is exactly where EVEDY is positioned.

4.3 Open-Source Alternatives

Project	Scope	Limitation
NVIDIA NeMo Guardrails	Programmable middleware for LLM safety (Colang DSL)	No compliance management, no audit trail, no multi-regulation support
LLM Guard	Input/output validation	No governance, no policy engine
Microsoft Agent Governance Toolkit	Open-source runtime security (released Apr 2026)	Early stage, no regulatory compliance

Key differentiator: Open-source tools provide runtime primitives but lack compliance automation, multi-jurisdictional regulation packs, four-eyes policy workflow, audit hash-chains, and auditor-ready reporting — all core EVEDY capabilities.

5. EVEDY Market Position

5.1 Positioning

EVEDY occupies the intersection of two converging market segments:

AI Governance Platforms (\$300M → \$3.6B by 2033)	← Compliance, frameworks, audit (Credo AI, Holistic AI, IBM)
EVEDY CONTROL PLANE (Governance + Enforcement)	← ONLY player combining both
AI Runtime Enforcement (Part of \$3.1B TRiSM)	← Guards, real-time blocking (NeMo, Lakera→CheckPoint)

5.2 Differentiation

Capability	EVEDY	Governance-Only (Credo/Holistic)	Enforcement-Only (NeMo/Lakera)
Multi-jurisdiction regulation packs	✓	Partial	X
Runtime guardrails (jailbreak, toxicity, grounding)	✓	X	✓
Policy engine with four-eyes approval	✓	✓	X
Hash-chained audit trail	✓	Partial	X
Auditor portal with integrity verification	✓	X	X
Trust scoring per agent	✓	✓	X

Kill switch / emergency freeze	✓	X	X
Multi-tenant SaaS + on-premise	✓	SaaS only	Varies
OWASP LLM Top 10 coverage	✓	Partial	Partial

5.3 Target Segments

Segment	TAM Contribution	Regulatory Pressure	EVEDY Fit
Financial Services (EU/UK/AU)	High	APRA, ASIC, FCA, PRA, MiFID II, EU AI Act	Strong — multi-regulator support
Healthcare	Medium	HIPAA, EU AI Act (high-risk)	Strong — high-risk classification
Critical Infrastructure	Medium	SOCI Act (AU), NIS2 (EU), EU AI Act	Strong — kill switch, emergency freeze
Technology / SaaS	High	EU AI Act (GPAI), GDPR	Medium — developer-focused SDK
Public Sector	Medium	National AI strategies, procurement	Strong — on-premise deployment option

6. Market Timing

Why Now

1. **Regulatory cliff:** EU AI Act high-risk system obligations become enforceable **August 2, 2026** — enterprises have ~4 months
2. **Enforcement has started:** Finland activated full enforcement powers Dec 2025; investigations underway across EU
3. **Consolidation wave:** Runtime enforcement point solutions absorbed by security vendors → integrated platforms win
4. **Board-level visibility:** AI governance promoted from IT concern to board agenda (Gartner, Forrester)
5. **Budget availability:** Compliance budgets up 30% in 2025, projected to accelerate in 2026

Window of Opportunity

The 2025–2028 period is the land-grab phase for AI governance platforms — analogous to the GDPR compliance wave of 2016–2018 that created companies like OneTrust (\$5.3B valuation). The EU AI Act is a larger, more complex regulation affecting a broader range of organizations.

Sources

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