

On the Radar: Gluware simplifies IT automation

Gluware wants to take the complexity out of upgrading existing networks

Publication Date: 13 Jul 2018 | Product code: SPT002-000101

Stephanie Gibbons



Summary

Catalyst

One of the largest challenges to network virtualization is integrating new technologies into brownfield (existing) networks. The concern is disrupting mission-critical services and taking a huge hit to quality of service (QoS) perceptions. This represents not only a technical hurdle, but a real internal cultural challenge.

Gluware's stated mission is to "make networking simple" by delivering the "best multi-vendor packaged enterprise automation solutions in the market." The promise of simple networking should hit home with enterprises (and operators) and is worth considering in a time when network transformation is essential to compete with the disruptive web-scale companies that are delivering new, innovative services over born-on-the-cloud networks.

Key messages

- Gluware is positioning itself to help customers gain more control over their networks.
- Gluware's portfolio allows customers to move away from manual changes and limited scripts, reducing the chance of human error.
- Gluware has moved beyond being just an SD-WAN provider; with rebranding and portfolio expansion, it is now a competitor in the broader network and IT automation field.

Ovum view

Gluware's focus on automation aims to take the complexity out of the network. Network orchestration is complex and expensive to design and build. Getting devices and applications to work together smoothly is hard. Gluware Control is built to simplify this process.

Recommendations

Why put Gluware on your radar?

Gluware's stated purpose is to simplify the network. The company is addressing one of the largest hurdles to network transformation: integrating new technologies into existing networks. With a strong background in networking (top leadership comes from Yelofin and Firefly, a Cisco learning partner), a sharp focus on network automation and orchestration delivered via SaaS and on-premises, and a growing partner ecosystem, Gluware is positioned well to compete with even the largest communications vendors in the networking industry.

Highlights

Background

Prior to its rebranding, Gluware was known as Glue Networks. Glue Networks had an entrenched partnership with Cisco as an SD-WAN provider. In a move to go beyond SD-WAN and into the broader realm of network and IT automation, Gluware was renamed in 2017, backed by \$44m in funding.

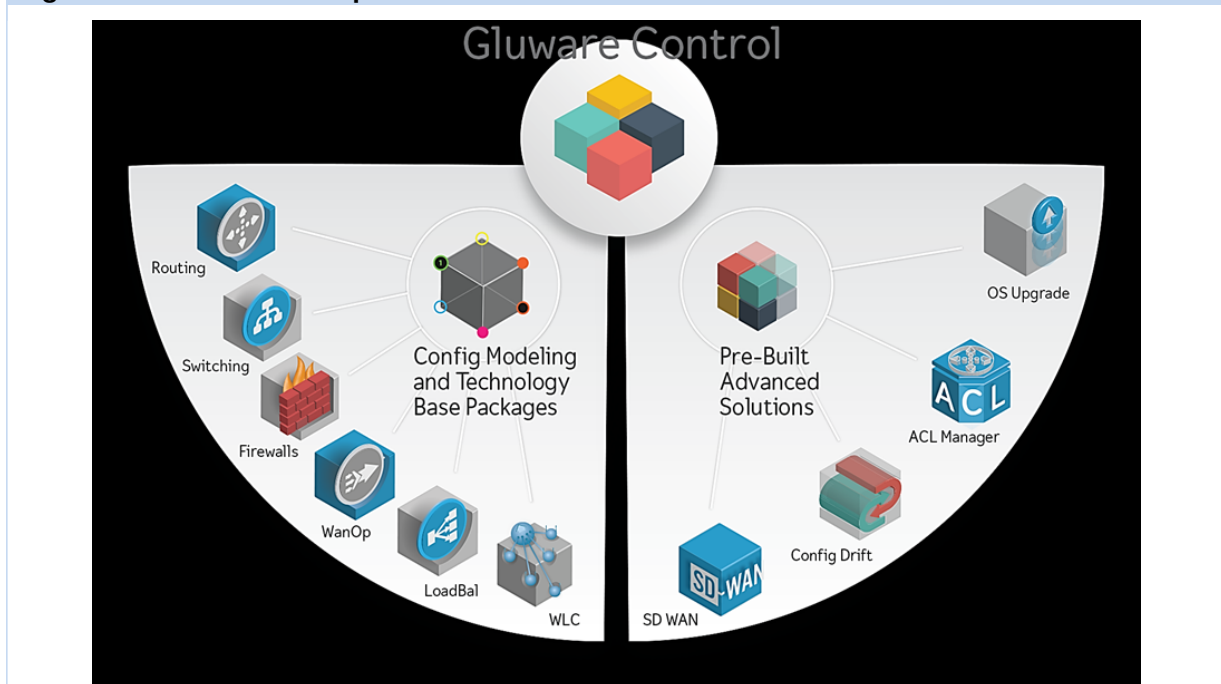
Today, Gluware strives to accelerate and optimize network and IT automation for enterprises. The company is a software-defined network orchestration and automation provider offering a platform that automates mission-critical infrastructure for major enterprises in over 25 countries. Headquartered in Sacramento, California, the company has global customers in the pharma, banking, engineering, retail, software, and (regional) managed services provider verticals. Gluware has a partner ecosystem of approximately 30 companies, including Cisco, VMware, and World Wide Technologies (WWT), to help it design and implement its network automation and orchestration platform.

Products and services

At the heart of Gluware's portfolio is its Gluware Control cloud-native automation and orchestration platform. This is a multi-vendor platform that uses an intent-based engine to perform discovery, analysis, and provisioning of network features. Ultimately, Gluware Control automates the network lifecycle management and enables its customers to roll out defined network and security features, while reducing both costs and human interaction.

Gluware also offers specific automation packages that provide additional applications for its platform. These include Config Modeling, Config Drift, QoS Management, OS Upgrade, VLAN Management, SD-WAN, and ACL Manager. Gluware software runs as software-as-a-service (SaaS) and can be implemented on-premises. Each delivery model is available through subscription or perpetual licenses.

Figure 1: Gluware Control platform



Source: Gluware

Central to the Gluware Control platform is its multi-vendor capability; it uses an intent-based engine to run device modeling which can detect multiple vendors' devices across the full network and automatically forward instructions to each specific device. This capability is particularly important in addressing enterprises' hesitancy to virtualize networks because Gluware supports multi-vendor networking environments, and enterprises will not be forced into vendor lock-in.

Business model and commercial strategy

The Gluware value proposition is based on the following metrics: time spent making manual changes and troubleshooting, time to deploy/enable new features, and security and compliance of the network.

Manual change: Most IT organizations still make most network configurations changes manually. Based on a handful of vendor conversations, the average change window can cost approximately \$50 and can take up to one hour per device. Since the network infrastructure is made up of thousands of routers, switches, firewalls, load balancers, WAN optimizers, and wireless LAN controllers, the change management expense can add up to hundreds of thousands to millions annually. Manual changes often lead to errors and misconfiguration, and troubleshooting adds to that cost. Gluware states that it can provide immediate ROI with a 50:1 or better improvement, depending on how many parallel changes are executed.

New feature deployment time: The second factor that drives Gluware's value proposition is that it can minimize the time it takes to deploy a new feature in the network. A large enterprise customer shared that a global QoS change outsourced would take 6–9 months and cost an average of \$240,000 across more than 400 routers. Once insourced to Gluware, the change was rolled out network-wide in three days. This is just one example, but if Gluware is able to deliver this shorter feature rollout timeframe to its wider customer base, this will continue to be a value differentiator.

Network security and compliance: The final factor is the impact of security and the ability to audit the network for various compliance and governance requirements. Security on the network has many requirements, from access control list (ACL) and policy rule management to authentication like AAA, 802.1x, and many more protocols that must be configured and maintained. Gluware goes to market with the ability to implement configuration across multi-network vendors. With centralized control, changes can be made to address a newly detected threat and lock down the network. Providing the ability to monitor for configuration change, Gluware helps organizations run their monthly and quarterly compliance checks from a single platform rather than from a variety of vendor management tools.

With the rebranding, and its enhanced portfolio, Gluware is no longer just an SD-WAN provider; it has evolved to become a viable competitor in the network and IT automation field. Gluware goes to market with a clear stance that it can help ease the strain of network complexities, primarily manual changes within the network; policy violations due to human error; and unnecessary opex spent on network visibility and troubleshooting.

Appendix

On the Radar

Ovum's "On the Radar" series highlights up-and-coming companies bringing potentially disruptive ideas, products, or business models to their markets. "On the Radar" companies bear watching for their potential impact on the market for the current or future services of telcos and their suppliers.

Further reading

"First cloud, now automation: Is SDN/NFV becoming an afterthought?," SPT002-000092 (June 2018)

"Service providers dive into SD-WAN for enterprises, but their go-to-market strategies will need work," TE0005-000996 (September 2017)

Author

Stephanie Gibbons, Principal Analyst, Network Infrastructure and Software

stephanie.gibbons@ovum.com

Ovum Consulting

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Ovum's consulting team may be able to help you. For more information about Ovum's consulting capabilities, please contact us directly at consulting@ovum.com.

Copyright notice and disclaimer

The contents of this product are protected by international copyright laws, database rights and other intellectual property rights. The owner of these rights is Informa Telecoms and Media Limited, our affiliates or other third party licensors. All product and company names and logos contained within or appearing on this product are the trademarks, service marks or trading names of their respective

owners, including Informa Telecoms and Media Limited. This product may not be copied, reproduced, distributed or transmitted in any form or by any means without the prior permission of Informa Telecoms and Media Limited.

Whilst reasonable efforts have been made to ensure that the information and content of this product was correct as at the date of first publication, neither Informa Telecoms and Media Limited nor any person engaged or employed by Informa Telecoms and Media Limited accepts any liability for any errors, omissions or other inaccuracies. Readers should independently verify any facts and figures as no liability can be accepted in this regard – readers assume full responsibility and risk accordingly for their use of such information and content.

Any views and/or opinions expressed in this product by individual authors or contributors are their personal views and/or opinions and do not necessarily reflect the views and/or opinions of Informa Telecoms and Media Limited.

CONTACT US

ovum.informa.com

askananalyst@ovum.com

INTERNATIONAL OFFICES

Beijing

Dubai

Hong Kong

Hyderabad

Johannesburg

London

Melbourne

New York

San Francisco

Sao Paulo

Tokyo

