Three Companies Offering Disaggregated Routing Platforms Named IDC Innovators

FRAMINGHAM, Mass., November 4, 2019 – International Data Corporation (IDC) has published a new IDC Innovators report profiling three companies that provide high-performance, scalable disaggregated routing platforms. The three companies are Arrcus, DRIVENETS, and Volta.

Network disaggregation – the architectural decoupling of the software that runs on a networking device from the physical device itself – initially emerged in switching at hyperscale and cloud datacenters where network operators and the businesses they supported sought choice and flexibility in the network software and hardware they deployed. The primary benefit of a disaggregated, abstracted, and comprehensively automated datacenter network running on a standardized hardware substrate was that it could be efficiently managed and operated at unprecedented scale.

Network disaggregation has since proliferated both beyond hyperscale and beyond the realm of switching. Network disaggregation also has grown in sophistication, with the rise of microservices and the development of rich abstraction layers allowing disaggregation within and between the management, control, and data planes of network devices and the SDN fabrics to which they often belong. The result is a growing number of disaggregated routing platforms that serve a variety of use cases in communications service provider networks, intelligent edge environments, and datacenter networks.

"Hyperscalers were the first to embrace and derive compelling value from network disaggregation in datacenters of unprecedented scale. As the cloud effect reverberates across markets and industries, however, network disaggregation has evolved, moving both up the stack into routing and into a wide range of use cases, not only in datacenters, but also in carrier core and edge deployments, and broader telco cloud strategies. IDC recognizes a new wave of startup vendors addressing needs and opportunities for disaggregated routing platforms," said Brad Casemore, research vice president, Datacenter Networks.

"Communication Services Providers (CSPs) have historically managed to keep their routing capex in check in the face of exploding bandwidth demand mainly through breakthrough improvements in routing silicon capacity as dictated by Moore's law. However, as Moore's law reaches its limits, the routing industry, led by a few startups, has begun to explore new

routing architectures to alter routing economics. This study summarizes three approaches to an existential problem faced by CSPs today," said Rajesh Ghai, research director, Carrier Network Infrastructure.

The report, *IDC Innovators: Disaggregated Routing Platforms, 2019* (IDC #US45587219), profiles three emerging vendors in the disaggregated routing platforms market.

Arrcus offers a routing-centric platform with deep protocol support and rich visibility that abstracts and leverages in extensive array of network merchant silicon to serve edge and core use cases for CSPs, cloud providers, and cloud-forward enterprises.

DRIVENETS provides virtual, distributed, disaggregated, and highly scalable network solutions using a cluster of low-cost white boxes built on merchant silicon and running cloud-native containers-based software with a flat licensing fee.

Volta features a disaggregated container-based cloud-hosted control plane, a commodity switch hosted on-premise data plane that can scale to several router instances on one switch, and a subscription model at a fraction of the acquisition cost.

About IDC Innovators

IDC Innovators reports present a set of vendors – under $100 million in revenue at time of selection – chosen by an IDC analyst within a specific market that offer an innovative new technology, a groundbreaking approach to an existing issue, and/or an interesting new business model. It is not an exhaustive evaluation of all companies in a segment or a comparative ranking of the companies. Vendors in the process of being acquired by a larger company may be included in the report provided the acquisition is not finalized at the time of publication of the report. Vendors funded by venture capital firms may also be included in the report even if the venture capital firm has a financial stake in the vendor's company. IDC INNOVATOR and IDC INNOVATORS are trademarks of International Data Group, Inc.

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