With Stackdriver, Blue Medora's BindPlane proposition solidifies

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By Nancy Gohring

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Introduction

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451 TAKE

Blue Medora has toyed with several approaches to bringing BindPlane to market; its arrangement with Google Stackdriver demonstrates one solid business model and is likely to become the dominant one. The benefits to Google, end users and Blue Medora are clear here. Google can legitimately position Stackdriver as a monitoring tool that can serve hybrid enterprises and Blue Medora earns a cut based on the volume of data that end users collect. End users get a low-barrier entry to pulling into Stackdriver more data about their IT environments and under a cost model that they already understand. Challenges for Blue Medora remain; namely, around raising awareness for BindPlane among potential end users and in attracting new customers like Stackdriver.

Context

Based in Grand Rapids, Michigan, Blue Medora was founded in 2007. It has raised a total of $28.5m including a $10m round in September led by Edison Partners. Other funders include Lewis & Clark Ventures, First Analysis and VMware.

Blue Medora started out developing database monitoring products delivered as add-ons to third-party monitoring platforms. In 2017, it branched out and began offering a stand-alone monitoring tool called SelectStar that offers insight into legacy and modern database technologies.

The focus of this report is BindPlane, the latest product developed by Blue Medora. BindPlane is essentially an iPaaS for collecting operations data from the many technologies that might be deployed in an IT environment, passing the data on to third-party monitoring tools.

Products

BindPlane end users run a Java-based collector that manages plug-ins that collect data from across the IT environment, sending the data through an API gateway and on to a monitoring tool. The collector can automatically download and install updates for itself and the plug-in, addressing an agent management headache that IT teams often struggle with.

Blue Medora recently developed log collection functionality. The capability is based on the open source Fluentd agent and is fully managed by BindPlane in the way that its metrics collectors are, with automatic updates pushed to the agent as required. BindPlane automatically collects logs important to specific technologies like Tomcat or Kubernetes and parses them into structured data that can then be used to generate metrics that feed dashboards in monitoring tools like Stackdriver. The parsing is done at the agent with the goal of reducing the volume of data sent to the monitoring tool, thus reducing throughput charges. However, doing so also increases the overhead of the agent, although Blue Medora says that the process doesn't consume much CPU or memory.

The logs capabilities are currently in alpha for Stackdriver customers, with general availability expected in the second or third quarter. Blue Medora initially supports about 20 source types and expects to quickly ramp up integrations with additional technologies.

Adding the log collection capability enables additional insight into IT operations environments and supports an important trend in monitoring around combining logs and metrics in a single monitoring tool. Blue Medora can now help monitoring vendors that have previously focused on metrics collection to add logs as a data source.

Business model

Blue Medora has envisioned a few different business models, including one where enterprises buy BindPlane as a central tool for collecting data and sending it to the various monitoring tools they use. Another model involves monitoring vendors employing BindPlane to essentially outsource the work it takes to continuously build support for collecting operations data from the wide variety of technologies that enterprises employ in their IT environments.

The value of this second model is clearly demonstrated in Blue Medora's relationship with Google Stackdriver. While Google has tried to position Stackdriver as a tool that could be used to monitor the entire IT estate, including on-premises environments and competitive public clouds, Stackdriver is most commonly regarded as a tool for monitoring Google Cloud Platform. With Blue Medora, Google enables its customers to use Stackdriver to monitor 175 technologies including Oracle databases, NetApp storage devices, Cisco's UCS, Amazon RDS and Microsoft Azure Storage. It also allows Google to largely get out of the business of building integrations with the long list of non-Google services that its enterprise customers employ. We think the relationship with Blue Medora makes it much easier for Google to support the needs of enterprise customers that use a host of on-premises and cloud technologies and may position Stackdriver as more competitive with the many independent monitoring tools that can support hybrid environments.

Go to market

Google customers can find BindPlane in the GCP Marketplace, but discovering BindPlane (or anything on offer there) isn't easy. If Stackdriver customers consult the GCP documentation to look for ways to ingest data from additional technologies in their environment, they'll find reference to BindPlane, which should drive some business for Blue Medora. Stackdriver's field sales team is also introducing customers to BindPlane and Blue Medora reports positive initial results from this effort.

Blue Medora has a somewhat limited ability to market BindPlane in this scenario because the end users must be Stackdriver customers and because Blue Medora doesn't control the billing relationship with the end user. However, the upside is that Blue Medora has the potential to take advantage of Google's substantial reach. Blue Medora is doing so via marketing activities during the Google Next conference, one good way to raise awareness of BindPlane among Stackdriver users.

Pricing model

Once a Stackdriver customer discovers BindPlane in the Marketplace, signing up is easy, especially because doing so doesn't require up-front costs or establishing a billing relationship with a new vendor. Users pay for Stackdriver based on the volume of data they send to it; they pay for data collected by BindPlane and sent to Stackdriver the same way.

On the back end, Blue Medora and Google have a revenue share agreement where Google pays Blue Medora a percentage of what it brings in via data collected by BindPlane. We like this model because users already understand the cost of sending data into Stackdriver and there's no barrier to getting started using BindPlane.

Competition

We aren't aware of other iPaaS vendors similarly focusing on the monitoring segment. However, most iPaaS vendors could decide to target the monitoring market and then quickly build out the required integrations. These vendors include Informatica's Intelligence Cloud Services, Dell Boomi, Jitterbit, MuleSoft's Anypoint Platform and SnapLogic's Enterprise Integration Cloud.

In a sense, Blue Medora also faces competition from the monitoring vendors that differentiate themselves on the long list of technologies they monitor and on their ability to collect deep insight about those technologies. As these vendors continue to invest in their collection technologies and regard such technologies as differentiators, Blue Medora's addressable market shrinks. Zenoss, ScienceLogic, Logicmonitor and Datadog are among the vendors in this category.

With BindPlane, Stackdriver has the potential to become much more competitive with the independent monitoring vendors. As such, Stackdriver is now more competitive with the vendors listed above.

SWOT Analysis

STRENGTHS
With Stackdriver, Blue Medora's BindPlane gains legitimacy and reach, demonstrating its value to other potential customers and opening the door to a solid base of end users.

WEAKNESSES
Blue Medora is somewhat limited in its ability to market BindPlane because customers sign up for the offering via Stackdriver.

OPPORTUNITIES
Vendors of some monitoring tools like Google Stackdriver recognize that their customers employ a very long list of potential technologies, and building support for those technologies in their monitoring tools is an endless job. Blue Medora serves this need with BindPlane.

THREATS
Since many monitoring vendors pride themselves on the number of technologies they support, Blue Medora's addressable market may be small.