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- **Are IP SANs a chimaera?**

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I heard a story today that a US IP SAN supplier had lost people from its European operation, senior people, and that it had more or less folded up in Europe. What was going on? What was the story?

The story is that customers generally don't want IP SANs; they want IP storage; they can use iSCSI but they don't want IP SANs. There is not enough demand for blocks to be delivered from storage across an IP network to end users, to justify them buying an IP SAN. (Some markets, the broadcast and media one for example, are bucking this trend but we'll set that niche aside.)

Enterprises had/have databases and other high-end applications greedy for blocks of data delivered from consolidated storage. That's what got Fibre Channel SANs started and what keeps them valid and growing in use. Fibre Channel SANs do the business for big business.

Smaller businesses and departments and servers in enterprises which don't currently have SAN access but may want it can't afford the Fibre Channel infrastructure.

They can afford to have shared file storage - NAS - and access that over Ethernet but they can't afford a 'proper storage fabric'. The IP SAN vendor's belief is that SMEs and departments do need SANs and that if they built an IP SAN product then the customers would come.

It seems not. The IP SAN developers are going through VC cash at a rate not justified by the potential market for IP SANs. It seems that there is a need for block data to be delivered to SMEs and departments but not at the level needed to support IP SAN product sales. Customers want iSCSI; they want IP storage; they don't want IP SANs alone.

Instead, in a reversal of the enterprise pattern, it's likely that IP SANs will be sold as adjuncts.

The enterprise pattern is that a NAS head is an adjunct to a SAN. With SMEs an IP SAN is an adjunct to a NAS filer, the two forming IP storage, delivering files or blocks to order. No wonder that Network Appliance is so successful as an iSCSI vendor; NAS products have a magnetic market attraction for iSCSI and NetApp has a great NAS installed base.

With enterprise departments and their non-FC-connected servers iSCSI will, I think be used in an additional way - as a Fibre Channel SAN extension product. It's a cheap way to link the great (FC) unwashed to SANs.

In the enterprises we're seeing the FC SAN remain at the heart of the storage infrastructure with NAS access being layered around it.

In the SMEs we're seeing the NAS filer remain at the heart of the storage infrastructure with IP SAN access being layered on alongside it. The iSCSI technology is a route to get a NAS filer to deliver blocks as well as files.

What this means for IP SAN companies such as EqualLogic, Intransa and LeftHand Networks, is that they need to link up with NAS suppliers.

That's the story I heard. I wrote before about [SAN schism](#). It looks as if it will happen - if this IP SAN story is true.

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