

IP Multimedia Subsystem Market Forecasts to 2034 – Global Analysis By Component (Product, and Services), Network Type (Fixed Network, and Mobile Network), Deployment (Cloud-Based, and On-Premises), Application, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global IP Multimedia Subsystem Market is accounted for \$4.0 billion in 2026 and is expected to reach \$13.1 billion by 2034 growing at a CAGR of 15.9% during the forecast period. IP Multimedia Subsystem is a standardized architectural framework for delivering IP-based multimedia services, enabling voice, video, messaging, and data services across fixed and mobile networks. IMS facilitates seamless communication between different networks and devices, supporting applications including Voice over LTE (VoLTE), Voice over Wi-Fi, Rich Communication Services, and 5G voice services. The market encompasses cloud-based and on-premises deployments serving fixed and mobile network operators, communication service providers, and enterprises.

Market Dynamics:

Driver:

Rapid deployment of 5G networks and VoLTE services

The global rollout of 5G networks and expansion of Voice over LTE services are primary drivers for the IMS market. IMS is essential for delivering voice and multimedia services over 5G standalone networks, enabling features including enhanced voice quality, video calling, and network slicing. As mobile operators transition from legacy circuit-switched voice to IP-based voice services, IMS deployment becomes mandatory. The migration

of 2G and 3G networks to LTE and 5G, particularly in developing regions, creates substantial IMS demand. The increasing adoption of VoLTE devices and growing consumer expectations for high-quality multimedia communication support continued market growth.

Restraint:

High deployment costs and integration complexity

The significant investment required for IMS deployment and the complexity of integrating with legacy network infrastructure represent major restraints for market growth. IMS implementation requires substantial capital expenditure for new hardware, software, and network upgrades. Integration with existing circuit-switched networks, billing systems, and operational support systems demands significant technical expertise and resources. Network operators face challenges in achieving seamless interoperability between legacy and IMS-based services during transition periods. These cost and complexity factors may delay deployment timelines, particularly for smaller operators with limited budgets.

Opportunity:

Emergence of cloud-native IMS and network function virtualization

The shift toward cloud-native architectures and network function virtualization presents significant opportunities for the IMS market. Virtualized IMS solutions running on standard servers reduce hardware dependency and deployment costs. Cloud-native IMS enables greater scalability, flexibility, and faster service innovation compared to traditional appliance-based deployments. Operators can deploy IMS functions on commercial off-the-shelf hardware, reducing capital expenditure and enabling dynamic resource allocation. The adoption of containerization and microservices architecture supports continuous deployment and operational efficiency. As operators modernize network infrastructure, cloud-native IMS adoption accelerates.

Threat:

Competition from over-the-top (OTT) communication applications

The widespread adoption of over-the-top communication applications including WhatsApp, Skype, Telegram, and WeChat poses a significant threat to operator-

controlled IMS services. OTT applications offer free or low-cost voice, video, and messaging services, reducing revenue from traditional communication services. Younger demographics increasingly prefer OTT applications over carrier services, potentially reducing IMS adoption. Network operators face challenges in competing with OTT innovation cycles. Differentiation through quality of service, reliability, and integration with other carrier services is essential for maintaining IMS value proposition against OTT competition.

Covid-19 Impact:

The COVID-19 pandemic accelerated IMS adoption as communication traffic surged during lockdowns and remote work requirements. Network operators prioritized network modernization and capacity expansion, including IMS deployments. The surge in voice and video traffic demonstrated the importance of IP-based communication infrastructure. However, deployment timelines faced delays due to supply chain disruptions and site access restrictions. Post-pandemic, remote work and digital communication have sustained elevated demand, with the crisis reinforcing the importance of robust, scalable multimedia communication infrastructure. The market has recovered strongly with operators continuing modernization programs.

The Mobile Network segment is expected to be the largest during the forecast period

The Mobile Network segment is expected to account for the largest market share during the forecast period, driven by the widespread adoption of VoLTE, VoWiFi, and 5G voice services across global mobile networks. Mobile operators are deploying IMS to enable high-quality voice services over LTE and 5G networks, replacing legacy circuit-switched voice infrastructure. The segment benefits from the continuing migration from 2G and 3G networks and expanding 5G coverage across developed and developing regions. Growing mobile subscriber bases and increasing smartphone penetration support sustained IMS demand. With the mobile network segment representing the primary IMS deployment, it maintains market leadership.

The Cloud-Based segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Cloud-Based segment is predicted to witness the highest growth rate, fueled by advantages in scalability, reduced capital expenditure, and operational efficiency. Cloud-based IMS deployment eliminates the need for dedicated hardware, reducing upfront investment and enabling pay-as-you-go models. Automatic

scaling accommodates varying traffic demands, optimizing resource utilization and enabling rapid service deployment. Software updates are automatically applied, reducing maintenance overhead and accelerating time-to-market. As network operators and enterprises embrace cloud-native architectures and virtualization, cloud-based IMS adoption grows at exceptionally high rates.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by advanced telecommunications infrastructure, early 5G deployment, and the presence of major IMS vendors. The region's operators were early adopters of VoLTE and continue investing in IMS for 5G services. Strong enterprise communication requirements and technology leadership create favorable conditions for IMS adoption. Regulatory frameworks support network modernization investment. With established IMS deployments and continued investment, North America maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by massive 5G network deployments, rapid mobile subscriber growth, and expanding telecommunications infrastructure investment. Countries including China, India, Japan, South Korea, and Southeast Asia are experiencing accelerated network modernization. The region's large populations and growing mobile penetration create substantial IMS demand. Government initiatives promoting broadband connectivity and digital infrastructure support market expansion. As 5G adoption accelerates and mobile networks transition to IP-based services, Asia Pacific delivers the fastest IMS market growth globally.

Key players in the market

Some of the key players in IP Multimedia Subsystem Market include Telefonaktiebolaget LM Ericsson, Nokia Corporation, Huawei Technologies Co., Ltd., ZTE Corporation, Cisco Systems, Inc., Oracle Corporation, Mavenir Systems, Inc., Ribbon Communications Inc., Samsung Electronics Co., Ltd., NEC Corporation, Fujitsu Limited, Amdocs Limited, Netcracker Technology Corporation, Hewlett Packard Enterprise Company, Juniper Networks, Inc., Comarch S.A., Matrixx Software, Inc., and Affirmed Networks, Inc.

Key Developments:

In June 2026, Ribbon Communications expanded its technological partnership with regional operator Comporium, deploying its vC20 Call Controller and IP Application Server to replace legacy ATCA-based and TDM hardware systems with modern, cloud-hosted IP voice capabilities.

In March 2026, Ericsson signed a comprehensive multi-year framework agreement with SoftBank Corp. in Japan to deploy its Cloud IMS and dual-mode 5G Core running on Ericsson Cloud Native Infrastructure Solution (CNIS), modernizing existing voice and multimedia domains to accelerate the operator's transition to 5G Standalone (SA).

In March 2026, Nokia demonstrated an advanced IMS Data Channel prototype at Mobile World Congress (MWC 2026), showing how real-time automated text translation and transcription layers can be directly embedded into active mobile voice streams without causing call degradation.

Components Covered:

Product

Services

Network Types Covered:

Fixed Network

Mobile Network

Deployments Covered:

Cloud-Based

On-Premises

Applications Covered:

VoLTE

VoWiFi

Rich Communication Services (RCS)

Unified Communications

IPTV

Video Conferencing

Messaging Services

End Users Covered:

Telecom Operators

Enterprises

Government Organizations

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

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