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IP Multimedia Subsystem (IMS) Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component (Product, Services (Managed Services, Professional Services)), By Telecom Operator (Mobile Operators, Fixed Operators), By Region & Competition, 2021-2031F

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Abstracts

The Global IP Multimedia Subsystem (IMS) market is projected to expand significantly, rising from USD 3.57 billion in 2025 to USD 7.22 billion by 2031, reflecting a compound annual growth rate of 12.45%. Functioning as a standardized architectural framework, IMS facilitates the distribution of multimedia services, such as voice and video, across IP networks. The market's momentum is largely propelled by the telecommunications sector's migration from legacy circuit-switched architectures to comprehensive IP systems, coupled with the widespread deployment of 5G Standalone networks. This transition necessitates robust IMS implementation to support Voice over LTE and Voice over New Radio, which are vital for optimizing spectrum efficiency and ensuring service continuity. Highlighting this reliance, the Global Mobile Suppliers Association reported in 2025 that 375 operators across 156 countries are investing in Voice over LTE services, emphasizing the essential nature of IMS in modern connectivity.

Despite this growth, the market encounters substantial obstacles related to the intricacy of network integration. As service providers embrace modern IMS solutions, the requirement to establish seamless interoperability between emerging protocols and existing legacy systems introduces significant technical difficulties. This burden of integration can result in prolonged deployment schedules and escalated operational costs, which may hinder the speed of market expansion. Consequently, the difficulties associated with merging new technologies with established infrastructure remain a

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critical concern for operators aiming to modernize their networks efficiently.

Market Driver

The rapid deployment of 5G Standalone (SA) network architectures acts as a major driver for the Global IMS Market, primarily because this framework depends on IMS to facilitate Voice over New Radio (VoNR). In contrast to Non-Standalone deployments that rely on legacy LTE cores for voice, 5G SA necessitates a fully cloud-native IMS core to handle voice and video services, forcing operators to upgrade to exclusively IP-based communication infrastructures. This shift is gaining momentum as operators transition from testing phases to commercial launches to utilize advanced features like network slicing and ultra-low latency. Data from the Global Mobile Suppliers Association in December 2025 indicates that 181 operators across 73 countries are investing in public 5G standalone networks, signaling a significant surge in the procurement of modern IMS solutions.

Concurrently, the strategic decommissioning of legacy 2G and 3G circuit-switched networks is mandating a universal shift toward IMS-supported Voice over LTE (VoLTE). As telecom providers retire these older, spectrum-inefficient technologies to free up bandwidth for 4G and 5G, the traditional circuit-switched fallback for voice is removed, requiring robust IMS systems to maintain service continuity. According to Orange in October 2025, over 200 operators globally have initiated or finished their 2G or 3G phase-outs, directly intensifying the operational need for IMS to support basic connectivity. This migration serves a massive user base, with the Ericsson Mobility Report from June 2025 projecting that global 5G subscriptions will hit 2.9 billion by the end of the year, creating a vast market for IMS-enabled voice services.

Market Challenge

The complexities of network integration present a significant obstacle to the growth of the Global IP Multimedia Subsystem (IMS) market. As telecommunication operators work to modernize their systems, the technical requirement to establish seamless interoperability between emerging 5G protocols and established legacy systems creates a major operational bottleneck. This challenge compels service providers to allocate excessive resources toward testing and validation, resulting in increased capital expenditures and delayed time-to-market for essential multimedia services. As a result, the realization of revenue from advanced applications is postponed, which diminishes the immediate attractiveness of IMS investment for numerous operators.

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This operational friction is highlighted by a distinct disparity between investment intentions and actual deployment rates within the industry. According to the Global Mobile Suppliers Association in August 2025, although 173 operators were actively funding public 5G Standalone networks, only 77 had successfully achieved commercial launch. This notable gap demonstrates how integration difficulties effectively retard the speed of deployment. By extending the transition phase, these technical barriers limit the potential market for next-generation voice and video services, thereby constraining the overall growth potential of the IMS sector.

Market Trends

The rise of Network API Exposure and Monetization Models is fundamentally altering the IMS sector by converting networks into programmable platforms. Operators are utilizing standardized interfaces to make core IMS functions, such as Number Verification, accessible to developers, allowing providers to generate revenue from their infrastructure through real-time API access rather than relying solely on traditional subscriptions. This initiative has reached a massive scale; the GSMA's 'Open Gateway State of the Market' report from June 2025 notes that the initiative now encompasses 79% of the global mobile market share, with 73 operator groups pledging to support these APIs to access new enterprise revenue streams.

Furthermore, the expansion of Rich Communication Services (RCS) for Enterprise Messaging has become a key driver of IMS traffic growth, supported by universal operating system compatibility. Businesses are rapidly transitioning from SMS to RCS to take advantage of capabilities like high-resolution media and interactive carousels for better customer engagement, a shift that requires high-capacity IMS to handle the intricate signaling involved in rich business-to-consumer communications. This trend is having an immediate effect; Infobip's 'Messaging Trends Report' from March 2025 highlights a 500% year-on-year increase in global RCS usage on their platform, indicating a substantial spike in enterprise demand that necessitates robust IMS scaling.

Key Market Players

Huawei Technologies Co. Ltd

Ericsson AB

IBM Corporation

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Samsung Networks

CommVerge Solutions

Ribbon Communications

Cisco Systems Inc.

Oracle Corporation

Nokia Corporation

ZTE Corporation

Report Scope

In this report, the Global IP Multimedia Subsystem (IMS) Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

IP Multimedia Subsystem (IMS) Market, By Component

Product

Services

IP Multimedia Subsystem (IMS) Market, By Telecom Operator

Mobile Operators

Fixed Operators

IP Multimedia Subsystem (IMS) Market, By Region

North America

United States

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- Canada
- Mexico

Europe

- France
- United Kingdom
- Italy
- Germany
- Spain

Asia Pacific

- China
- India
- Japan
- Australia
- South Korea

South America

- Brazil
- Argentina
- Colombia

Middle East & Africa

- South Africa

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Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global IP Multimedia Subsystem (IMS) Market.

Available Customizations:

Global IP Multimedia Subsystem (IMS) Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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