



# IP Multimedia Subsystems Status Report

Emerging from the Trough of Disillusionment

## Overview

IP Multimedia Subsystem (IMS) Status Report: Emerging from the Trough of Disillusionment provides a valuable independent IMS status report that can help all in the industry have a clear view on its current status and the likely paths operators will take in the evolution of their networks.

### Report Structure:

This report provides an independent and quantified view of what is happening in the industry with IMS (IP Multimedia Subsystem), through the presentation of results from an industry-wide survey that encompasses 137 interviews (101 of with network operators).



The report also includes operator and supplier case studies, presenting a factual based current state of the market, without the hype and marketing spin that has frustrated many people on this topic.

These two objectives are reflected in the two main sections of this report: Market Survey Results and Case Studies which include Verizon, China Mobile, and Vodafone Spain.

## Key Findings

- IMS remains niche, with only 8% of those operators surveyed deploying IMS. (Note, none of those operators have completed the conversion of their network, all considered it a 5-7 year process) Another 12% are in an extended field trial, which is characterized by services being launched on the IMS core, with in some cases paying customers; but a decision has not yet been made to commit to service migration onto the IMS core.
- IMS does not appear to be entering a period of rapid adoption, rather a linear growth in initial adoption over the next 5 years, with by 2014 about 32% of operators commencing an IMS deployment.
- Regionally, NAR (North America Region) provides the bulk of the growth in years 2010 and 2011, while EMEA (Europe Middle East and Africa) and APAC (Asia Pacific) regions provide the bulk of growth in later years.
- Lack of business case, lack of standards compliance and BOSS (Business and Operational Support System) integration were the top three barriers to adoption as identified by operators.



## Companies in Report

### Operators

- AT&T
- Belgacom
- Bermuda Telecom
- Bharti Airtel
- BSKyB
- BT
- Cable One
- Charter
- City Telecom
- Cox
- Deutsche Telekom
- Etisalat (and operating companies)
- Hong Kong CSL
- Indosat
- KPN (and operating companies)
- Kuwait Telecom
- Maxis
- Mobilcom
- O2
- Optus
- Orange / France Telecom (and operating companies)
- Qtel
- Rogers
- SingTel
- Sprint
- Swisscom
- T-Com
- T-Mobile (and operating companies)
- Telecom Italia
- Telecom New Zealand
- Telefonica (and operating companies)
- Telenor (and operating companies)
- Telstra
- Telus
- Three (and operating companies)
- TWC
- Verizon
- Vodafone (and operating companies)

### Suppliers

- 4dk
- Alcatel Lucent
- AppTrigger
- Argela
- Camiant
- Cisco
- Comneon
- Comptel
- Converged Network Systems
- Dialogic
- Ecrio
- Espial
- Genband
- HP
- hSeind
- HTK
- Huawei
- IBM
- Intellinet
- jNetx
- Motorola
- NeuStar
- Nokia Siemens Networks
- Oracle
- OpenCloud
- Sigma Systems
- Tekelec
- Telcordia
- TM Forum
- Veraz
- Wipro

## Table of Contents

<b>FORWARD</b>	<b>IMS Plans</b>	<b>Case Study Review</b>
<b>Executive Summary</b>	<b>IMS Pricing</b>	<b>Where the market is going: IMS prognosis</b>
<b>Operator Recommendations</b>	<b>Rich Communications Suite</b>	<b>Conclusions and Recommendations</b>
<b>Network Equipment Recommendations</b>	<b>Alternatives and paths to IMS</b>	<b>Operator Recommendations</b>
<b>Service Layer Component (e.g. Service Broker) Recommendations</b>	<b>IMS Market Survey Conclusions</b>	<b>Network Equipment Recommendations</b>
<b>Mobile Handset Vendors</b>	<b>Case Studies</b>	<b>Service Layer Component (e.g. Service Broker) Recommendations</b>
<b>Application Developer Recommendations</b>	<b>Verizon Communications Case Study</b>	<b>Mobile Handset Vendors</b>
<b>Investor Recommendations</b>	<b>Verizon Background</b>	<b>Application Developer Recommendations</b>
<b>Introduction and Background Purpose</b>	<b>Principles behind Verizon's IMS deployment</b>	<b>Investor Recommendations</b>
<b>Brief IMS review</b>	<b>Breaking down the Silos</b>	<b>Appendix 1 - AcroNyms</b>
<b>IMS Market Survey Results</b>	<b>Service Delivery Ecosystem</b>	<b>Appendix 2 - Companies Interview</b>
<b>Background on the Research</b>	<b>Integration Experience</b>	<b>Operators</b>
<b>Operator Interviewee Analysis</b>	<b>Conclusion</b>	<b>Suppliers</b>
<b>Supplier Interviewee Analysis</b>	<b>China Mobile Case Study</b>	
<b>IMS Activity</b>	<b>Vodafone Spain Service Broker</b>	
<b>IMS Barriers</b>	<b>Explaining the Service Broker</b>	
<b>Vendor Perception Rankings</b>	<b>Vodafone Spain HomeZone Service</b>	
	<b>AppTrigger Case Study of an APAC Operator</b>	

## Table of Figures

<b>Figure 1. Operator IMS activity, and Distribution by Operator Type</b>	<b>Figure 22. Estimate of the Initial Application of IMS</b>
<b>Figure 2. Cumulative Percentage of Operators by year they anticipate starting IMS Deployment</b>	<b>Figure 23. Potential Service Drivers</b>
<b>Figure 3. IMS Barrier and Frequency of Occurrence from Operators</b>	<b>Figure 24. IMS Price Range per Region (Cost per Subscriber in US Dollars)</b>
<b>Figure 4. Supplier Ranking of Barriers</b>	<b>Figure 25. Rich Communication Suite Results</b>
<b>Figure 5. Estimate of the Initial Application of IMS</b>	<b>Figure 26. Alternatives and Paths to IMS</b>
<b>Figure 6. Alternatives and Paths to IMS</b>	<b>Figure 27. IMS Evolution</b>
<b>Figure 7. IMS Architecture</b>	<b>Figure 28. Verizon's IMS and SDE Vision (source Verizon)</b>
<b>Figure 8. Split between Operator and Supplier Interviews</b>	<b>Figure 29. Shared Infrastructure Vision (source Verizon)</b>
<b>Figure 9. Geographical Distribution of Operators Interviewed</b>	<b>Figure 30. Legacy Integration (source Verizon)</b>
<b>Figure 10. Operator Types Interviewed</b>	<b>Figure 31. China Mobile Network Architecture (source Huawei)</b>
<b>Figure 11. Distribution of Operator Interviews by Role</b>	<b>Figure 32. China Mobile Target Architecture (source Huawei)</b>
<b>Figure 12. Geographical Distribution of Suppliers Interviewed</b>	<b>Figure 33. Service Roadmap (source Huawei)</b>
<b>Figure 13. Distribution of Supplier Interviews by Role</b>	<b>Figure 34. Typical Prior Situation (source OpenCloud)</b>
<b>Figure 14. Distribution of Supplier Interviews by Type of Supplier</b>	<b>Figure 35. Service Broker Extending Pre-pay Applications (source OpenCloud)</b>
<b>Figure 15. Operator IMS Activity and Distribution by Operator Type</b>	<b>Figure 36. Vodafone Spain Service Broker Scenario (source OpenCloud)</b>
<b>Figure 16. Live IMS Services</b>	<b>Figure 37. APAC Operator Situation (source AppTrigger)</b>
<b>Figure 17. IMS Barrier and Frequency of Occurrence from Operators</b>	<b>Figure 38. Operator Decision Matrix (source AppTrigger)</b>
<b>Figure 18. Supplier Ranking of Barriers</b>	<b>Figure 39. Proposed Solution (source App Trigger)</b>
<b>Figure 19. IMS Vendor Ranking (Perception based)</b>	<b>Figure 40. Total Cost of Ownership Analysis (source AppTrigger)</b>
<b>Figure 20. IMS Vendor Ranking Regional Variation</b>	<b>Figure 41. Return on Investment Analysis (source AppTrigger)</b>
<b>Figure 21. Cumulative Percentage of Operators by year they anticipate starting IMS Deployment</b>	

# Order Form

Report Title

**IP Multimedia Subsystem (IMS) Status Report: Emerging from the Trough of Disillusionment**

License Type

- Single User License..... \$1,995 USD     
  Company-wide License.....\$4,995 USD  
 Team License (2-5 people) ... \$3,465 USD     
  Other licensing options available: Contact Mind Commerce

Family/Surname

First Name

Position

Company

Address

Country

Post Code

FAX

Telephone

Email

Order Type

-    
 Order by FAX at 1 877 646 3266

Card Number

Expiration Date (MM/YY)

CV Code

Cardholder's name

Signature

Billing Address

Postcode

Country

Signature

Date

## Online Ordering

Customers can order online by visiting report web page:

[http://www.mindcommerce.com/Publications/IMS\\_Status.php](http://www.mindcommerce.com/Publications/IMS_Status.php)