

Where does IMS stand?

By Tim Young

In considering the on-again-off-again relationship between market observers and IMS, I thought back to an article I wrote on the topic in 2005. I recall it mostly for the mix of enthusiasm and sheer bafflement demonstrated by many of the vendors and service providers I spoke to about the technology.

The piece was entitled, "Emerging IMS: Charting a New Direction", and most of the vendors I spoke with don't even exist anymore. (If you're itching for a ride in the wayback machine, you can read the whole article here: <http://www.pipelinepub.com/0605/tyoung.php>)

I closed the article with these words: "Optimism is somewhat easier to grab onto on the front end of a challenge. As IMS grows and changes, the true ability of firms to stay ahead of the curve will be tested, and it will be positive results that adorn the firms that display the most accurate vision of the future of IMS."

Now, there were all kinds of things I didn't know in 2005: That taking shampoo onto an airplane would one day be illegal. Which characters on the reimagined Battlestar Galactica were Cylons. That there would ever be such a thing as an iPhone.

But it was clear, even then, that IMS may have a complicated future.



True to form, within a few short years, the death of IMS was being declared in conference sessions and publications throughout the industry. Some, like Yankee Group's Brian Partridge, asserted that it was just the death of the hype cycle, but that the technology would remain active as long as CSPs remained invested in the complex and expensive framework (<http://blogs.yankeegroup.com/2008/04/02/ims-hype-is-officially-dead/>). Others, like unequivocal IMS critic Dean Buble, were far less diplomatic, decrying IMS as a boondoggle whose time had passed and that was only being propped up by those with incentive to do the propping (<http://disruptivewireless.blogspot.com/2009/08/mobile-ims-and-lte-networks-dead-parrot.html>).

And why wouldn't that be the case? Vendors,

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following the Field of Dreams model of infrastructure development (“If you build it, they will come.”) got to work doing the building, but the cost and complexity of IMS was proving to be too much for CSPs.

In fact, when we first discussed mentioning IMS as a part of our network impact issue, the conversation went something like, “now that IMS is dead, what are service providers using to do the things it should have done?”

Meanwhile, however, IMS was not resting in peace. Instead it was waiting for its moment to stride, like Tom Sawyer, into its own funeral service, breathing and grinning.

That moment seems to have arrived, thanks to LTE bullishness.

LTE’s strength is also its weakness: It’s all IP. There is no baked-in support for voice. In order to make LTE voice work, there are essentially four choices at this time (summed up nicely on the Teknocrat blog):

- Circuit switched fallback (CSFB), which is a temporary solution based on 3GPP standards.
- Voice over LTE via Generic Access (VoLGA), which is also a temporary solution and offers little promise of developing into a full multimedia service.
- OTT applications like Skype, which raise access/permissions issues for many carriers And,
- IMS

This is an issue that was addressed by the One Voice initiative orchestrated through the GSMA in 2009-2010. This initiative, composed of AT&T, Orange, Telefónica, TeliaSonera, Verizon Wireless, Vodafone, Alcatel-Lucent, Ericsson, Nokia Siemens Networks, Nokia, Samsung and Sony Ericsson, used current open standards to define the minimum mandatory set of functionality for interoperable IMS-based voice and SMS over LTE. The recommendations of the members of this initiative were folded into the broader VoLTE program in early 2010.

In VoLTE, IMS has found, if not its rebirth, definitely its ride into the future:

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“Our 2011 survey results show that fixed-line VoIP continues to be the primary service deployed over IMS,” said Diane Myers, Directing Analyst for VoIP and IMS at Infonetics Research in a statement released alongside that firm’s IMS global provider survey. “However, there also is a notable continuing shift toward IMS in the mobile world, evidenced by the rising number of mobile services planned over IMS by 2013: 78% of our respondents will have a mobile-specific service such as mobile messaging, VoLTE (voice over LTE), RCS (Rich Communication Service), and/or VoIP over 3G by 2013, up from 35% today.”

According to that survey, the leading factors driving IMS deployments are the desire to possess the ability to offer converged services and LTE deployment. This may be partly driven by pressure from the GSMA VoLTE initiative to avoid the aforementioned temporary solutions whenever possible (solutions like CSFB and VoLGA, which could prove difficult and costly to remove).

This may also be because vendors are as invigorated by this IMS renaissance as the service providers are. Infonetics reports that Nokia-Siemens Networks, Alcatel-Lucent, and Ericsson—all of which were members of the One Voice initiative—are the most commonly cited infrastructure vendors by service providers asked to identify leaders in the IMS space.

Huawei, however, is named by the report as a credible threat to those European powerhouses, and has been underscoring the crucial nature of IMS in the growth of LTE in its own right. According to a presentation by Huawei’s Rebecca Copeland at last fall’s 3GPP release 8 Implementation, Deployment, and Testing workshop, Huawei is the world leader in current LTE deployments, with 18+ commercial projects and 60 trials underway, worldwide. The bulk of these projects are in Europe and Asia (which, according to Infonetics

are leading the way in LTE deployment and IMS spend), but there are also examples in North America and the Middle East.

Copeland underscores the idea that IMS is both useful as a common core for LTE and that the VoLTE push has made IMS mandatory.

The global spend numbers reflect that.

The IMS equipment market hit the \$500million mark in 2010, but that was mostly for fixed-line deployment. As IMS becomes a more major component of LTE and consumer LTE rollouts continue to occur, the IMS market will continue to march forward.

“Activity for mobile IMS-based services will increase in 2011,” says Myers, “as we see the launch of mobile video calling from operators such as SK Telecom and Rich Communication Suite from Vodafone, in addition to select operators such as Verizon Wireless gearing for VoLTE deployments in early 2012.”

Five or six years ago IMS showed promise, but anemic carrier interest led to accusations of the tail wagging the dog as vendors pushed IMS on an unconcerned CSP community. Half a decade later, renewed carrier interest suggests that carriers haven’t given up on IMS quite as quickly as journalists and analysts have.

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