



# eSIM Seminar MWC 2019

28 February 2019

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# Impressive Industry support



**90+**  
Major industry players support the initiative



## Agenda part 1



Welcome speech

09:00 - 09:10

***Jean-Christophe Tisseuil, GSMA***

***Pablo Iacopino, GSMA***

eSIM is here! Learn the latest and what's next?

09:10 – 09:30

***Kerrie Lenhart Hogan, Google***

***Carsten Ahrens, G&D***

Digitisation of the Customer Journey

09:30 – 09:50

***Benoit Jouffrey, Gemalto***

Accelerating the pervasiveness of device connectivity with eSIM

09:50 – 10:10

***Erin Chapple, Microsoft***

***Emir Aboulhosn, Idemia***



## Agenda part 2



The challenges deploying IoT

10:15 - 10:55

Introduction

10:15 - 10:30

***Jean-Philippe Betoïn, Arm***

Panel Discussion: Beyond eSIM in IoT

10:30 - 11:00

***Ilan Reingold, Altair***

***Lars Wemme, Infineon***

***Crystal Lam, Sierra Wireless***

Conclusion

11:00

## Consumer Electronics

- Smartwatches lead the way. Adoption on the rise: 9% of adults ➡ ~100 million owners
- Cellular service availability still limited: 10 cities (One Number for Dual Terminals)
- The ecosystem speaks: eSIM in smartwatch will grow fast, but new VAS beyond fitness and healthcare are needed
- New wave beyond smartphones starting now? Laptops, tablets

## Internet of Things

- Four areas of progress: tech, partnerships, commercial products and regulation
- China too big to stay behind. Potentially the largest eSIM market over time
- The ecosystem speaks: Automotive, Logistics and Energy & Utilities top three markets for eSIM
- Key challenges: IoT market very fragmented/diverse, security, IoT business models changing

## Smartphones

- China lags behind: eSIM in smartphones yet to be launched
- Timelines are unclear ➡ we assume 2021
- The ecosystem speaks: smartphone key to drive eSIM scale and reduce costs
- Scenario analysis: eSIM adoption by 2025\*

	Low	Medium	High
China	22%	29%	35%
Global	25%	33%	42%