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# eSIM Summit at MWC22

eSIM Adoption and  
Global Market Trends

**Theatre 3 - Hall 7**  
**Wednesday 2 March 2022**  
**10.30-12:30 (GMT+1)**



**KORE**

**THALES**  
Building a future we can all trust



**TRUPHONE**



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# eSIM Summit: eSIM Adoption and Global Market Trends

## Market Status

eSIM in 2022 and beyond: assessing new developments, market trends and consumer behaviour

GSMAi

## Part 1 – eSIM involving in Massive IoT

Can eSIM be the Linchpin of Massive IoT ?

KORE

eSIM in Action: How to accelerate and keep Massive IoT SAFE

KORE  
KIGEN





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KEYNOTE SPEAKER  
**Pablo Iacopino,**  
Director of Ecosystem Research,  
GSMA





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Can eSIM be the Linchpin  
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KEYNOTE SPEAKER

**Marco Bijvelds,**

Senior Vice President, EAP,  
KORE



**TRUPHONE**

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**Marco Bijvelds,**  
Senior Vice President,  
EAP, KORE



**Loic Bonvarlet,**  
VP Product and  
Marketing, Kigen





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**eSIM Summit: eSIM Adoption and Global Market Trends**

# **eSIM in 2022 and beyond**

## **Assessing new developments, market trends and consumer behaviour**

DATE  
**2 March 2022**

**Pablo Iacopino**  
**Head of Research and Commercial Content**



## Good progress

- Proliferation of eSIM devices
- Launch of 5G devices with eSIM technology
- Commercialisation of eSIM service for smartphones and smartwatches
- eSIM for connected vehicles
- Work and alignment on global specifications (including ieUICC)
- eSIM for international roaming

## Slow progress

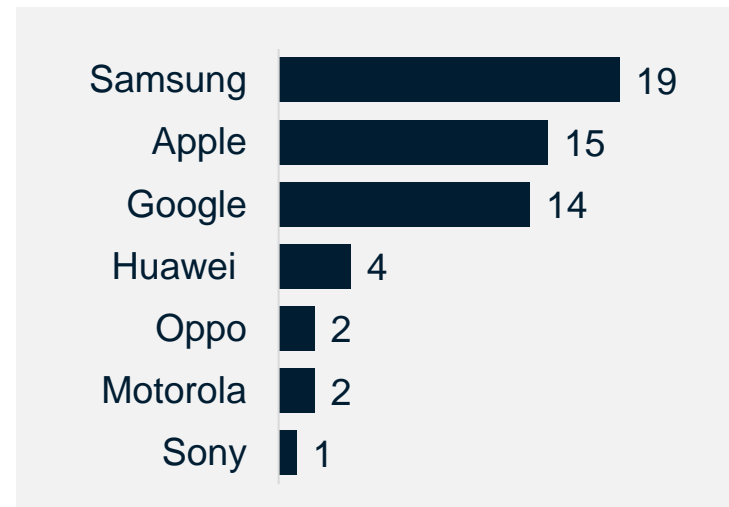
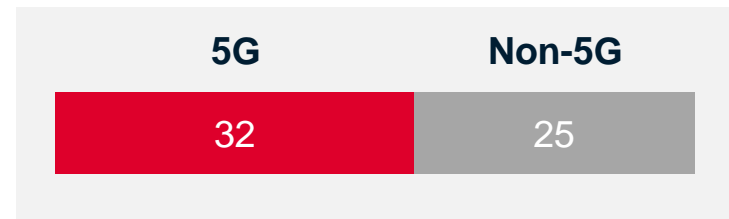
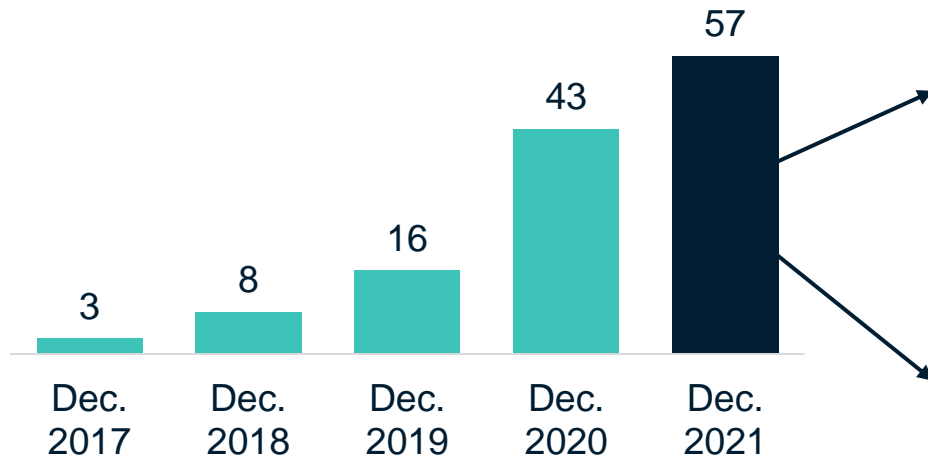
- Consumer awareness and adoption of eSIM
- eSIM 'democratisation' (for consumers) through cheaper devices
- eSIM promotion by OEMs and operators
- eSIM for IoT vertical sectors (beyond Automotive)
- eSIM for laptops

# eSIM in the smartphone market

*Nearly 60 eSIM smartphone models – more than half have 5G technology*

## How many eSIM smartphones have been launched?

Cumulative figures



- Most flagship smartphones are now eSIM-enabled
- 5G and eSIM get together
- Various models have a retail price < USD500

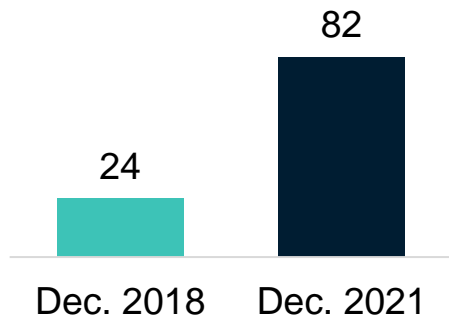


## eSIM service is now global

*eSIM reaches more than 3 billion mobile subscribers*

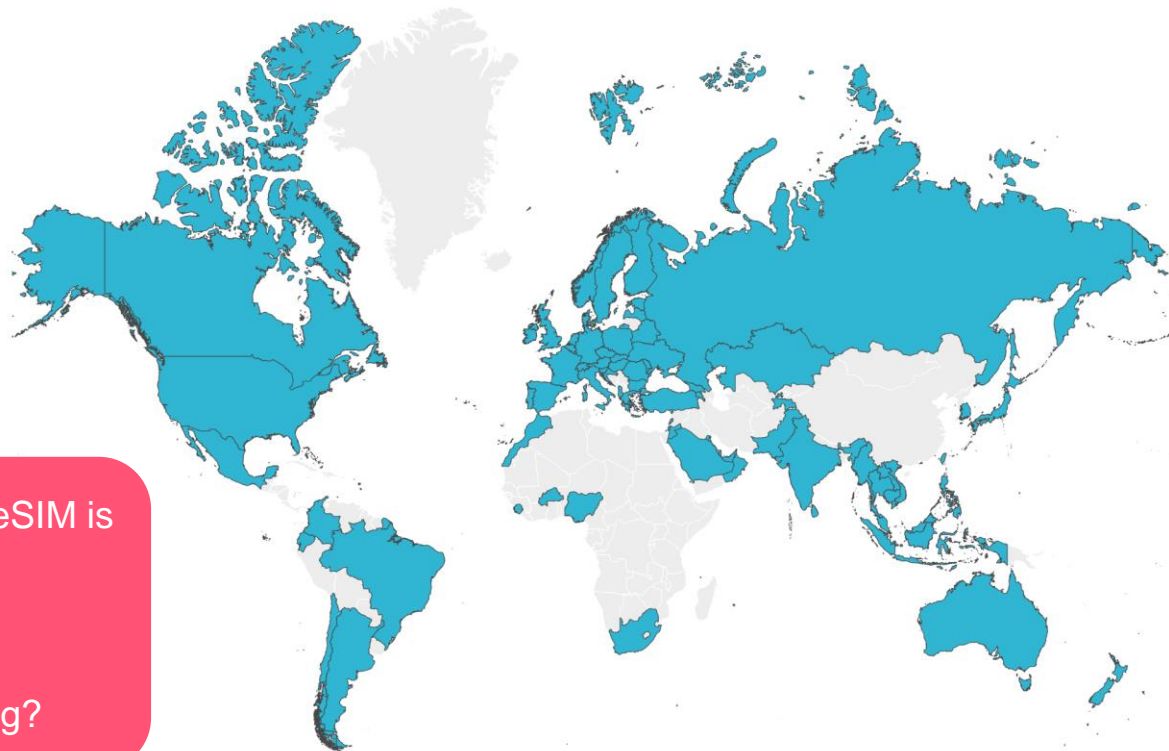
### Commercial availability of eSIM service for smartphones

Number of countries



- Most major markets are on board. eSIM is nearly ubiquitous in major markets
- Africa is catching-up
- China still missing...but for how long?

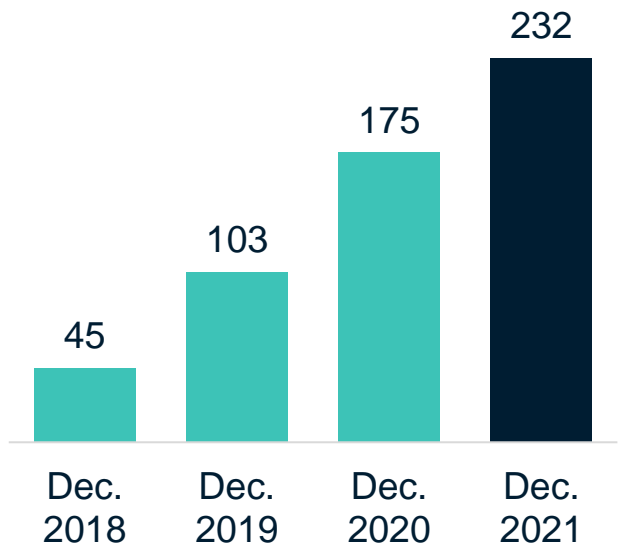
### Geographical reach



# More than 230 operators offer commercial eSIM service

*Fivefold increase over the last 3 years*

## Number of mobile service providers offering commercial eSIM service for smartphones



- Discussions with eSIM vendors indicate that this figure is even higher
- eSIM is a group strategy
- MVNOs are driving eSIM for international roaming

## What lies ahead?

**88%**

of surveyed operators plan to offer eSIM service by 2023

**98%**

by 2025

# Potential benefits of eSIM: what do operators think?

*Incremental revenues and opex savings – it's all about further digitisation*

## Potential benefits of eSIM

Operator views

2021 survey

Compared to  
2020 survey

- Streamline logistics costs by reducing physical SIM purchasing



- Explore opportunities in new digital services (e.g. digital identity, access authorisation, mobile ticketing and payment)



- Increase adoption of other mobile devices by linking them to a consumer's main subscription plan



- Facilitate international roaming services



- Be able to capture new opportunities in the growing IoT market (consumer and enterprise)



- Be able to capture new opportunities among Digital Native consumers



- Drive greater use of digital distribution channels



- Enhance customer experience by digitising SIM-related operations





# IoT is a promising market for eSIM

*However, eSIM adoption is still low relative to its long-term potential*

## TODAY

### Automotive

eSIM is already mainstream in connected vehicles

### Beyond Automotive

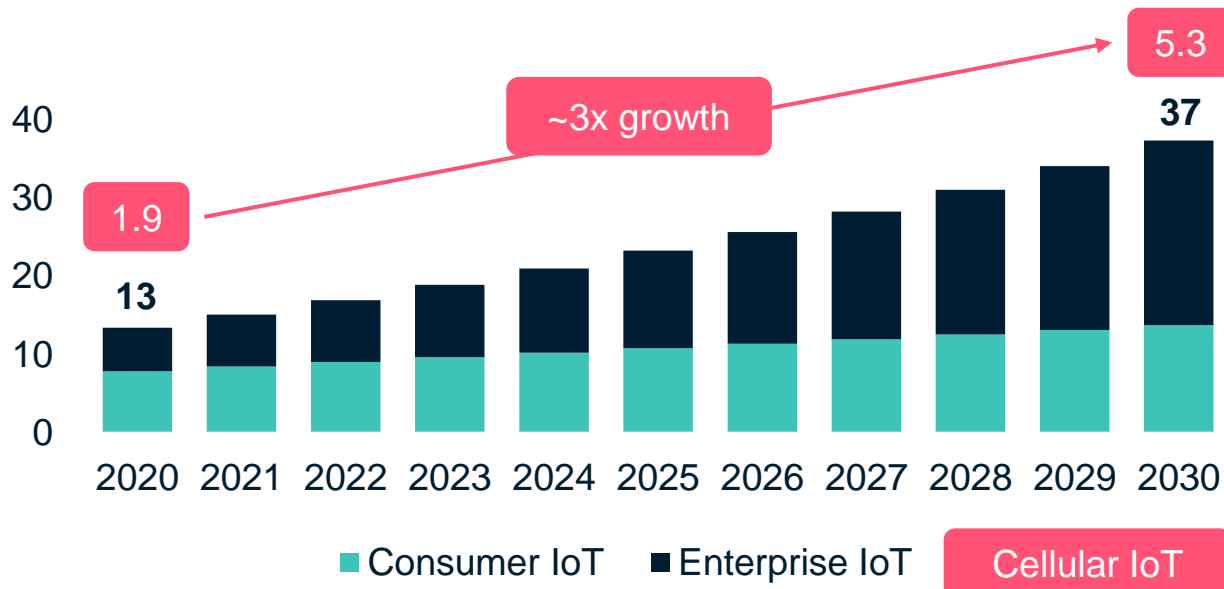
Single initiatives rather than sector-wide deployments

## FUTURE

### Global IoT connections – billion

The addressable market for eSIM and iSIM is significant

eSIM and iSIM are targeting a share of the cellular market



# eSIM for IoT: there is untapped demand

*Enterprises are accelerating their digital transformation*

## IoT deployments drive digitisation

Enterprises speak; % of respondents  
IoT deployments are:

IoT deployments are largely part of a wider digital transformation agenda

63%



Part of a wider digital transformation agenda

37%



Standalone initiative

## Importance of eSIM in future IoT deployments

Enterprises speak; % of respondents

eSIM for IoT is  
eSIM for digitisation

40%



Very important

44%



Somewhat important

10%



Not at all important

4%



I don't know

2%



I am not familiar with eSIM

- Awareness of eSIM is high
- 40% of enterprises see eSIM as very important to a successful IoT deployment
- Security and remote update of large volumes of devices are seen as the top eSIM benefits

eSIM

Assessing consumer  
behaviour

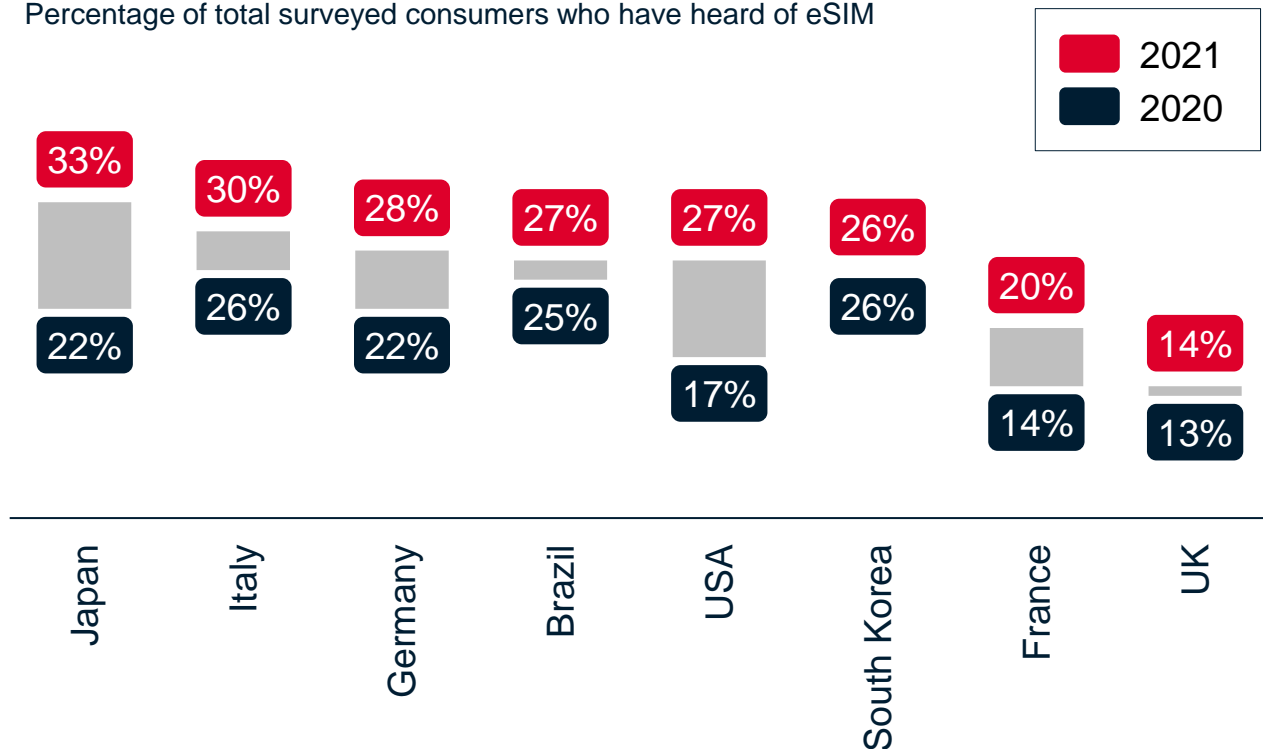


# Consumers: do they know what eSIM is?

*Consumer awareness of eSIM is still low*

## Consumer awareness of eSIM

Percentage of total surveyed consumers who have heard of eSIM



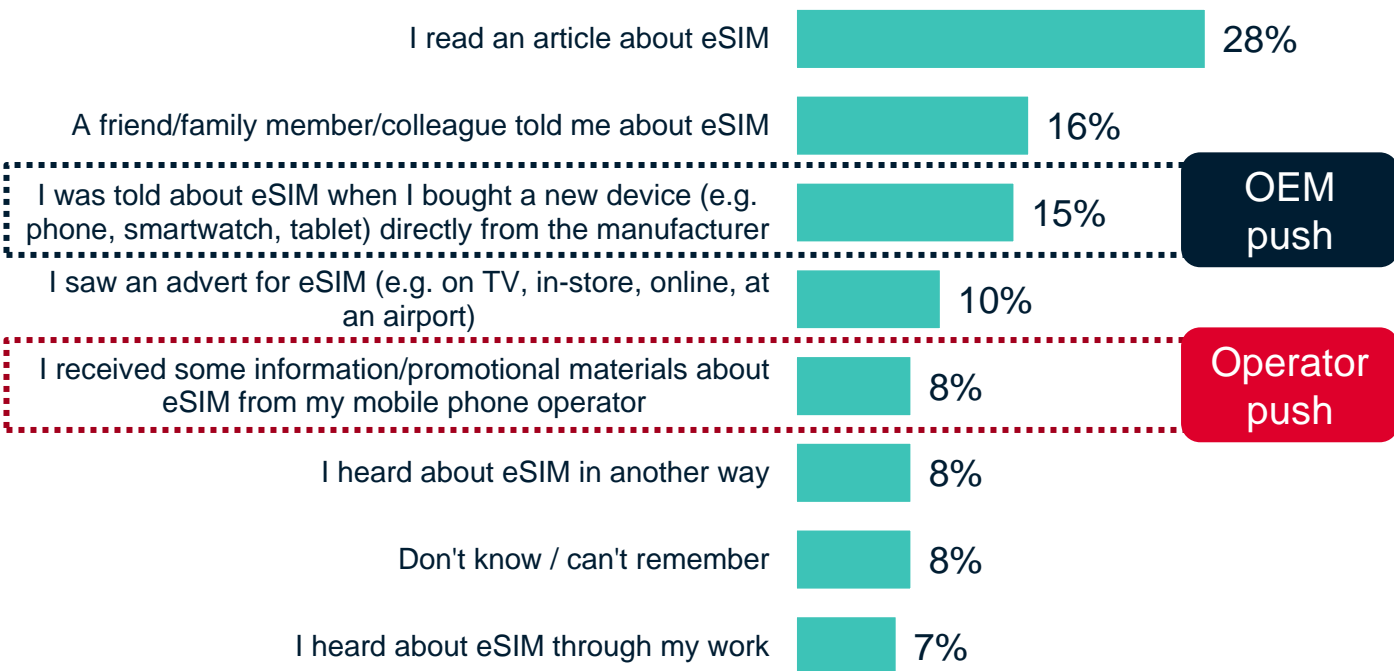
- Less than 30% of consumers are aware of eSIM (average)
- 5pp increase compared to 2020 (average)
- Significant variations by country...but no correlation with eSIM service availability
- More work is needed by operators and OEMs

# How do consumers first find out about eSIM?

*Slow push by OEMs and operators*

## Finding out about eSIM

Among surveyed consumers who have heard of eSIM (aggregate, 8 countries)



- Operators and OEMs don't talk much about eSIM to their customers

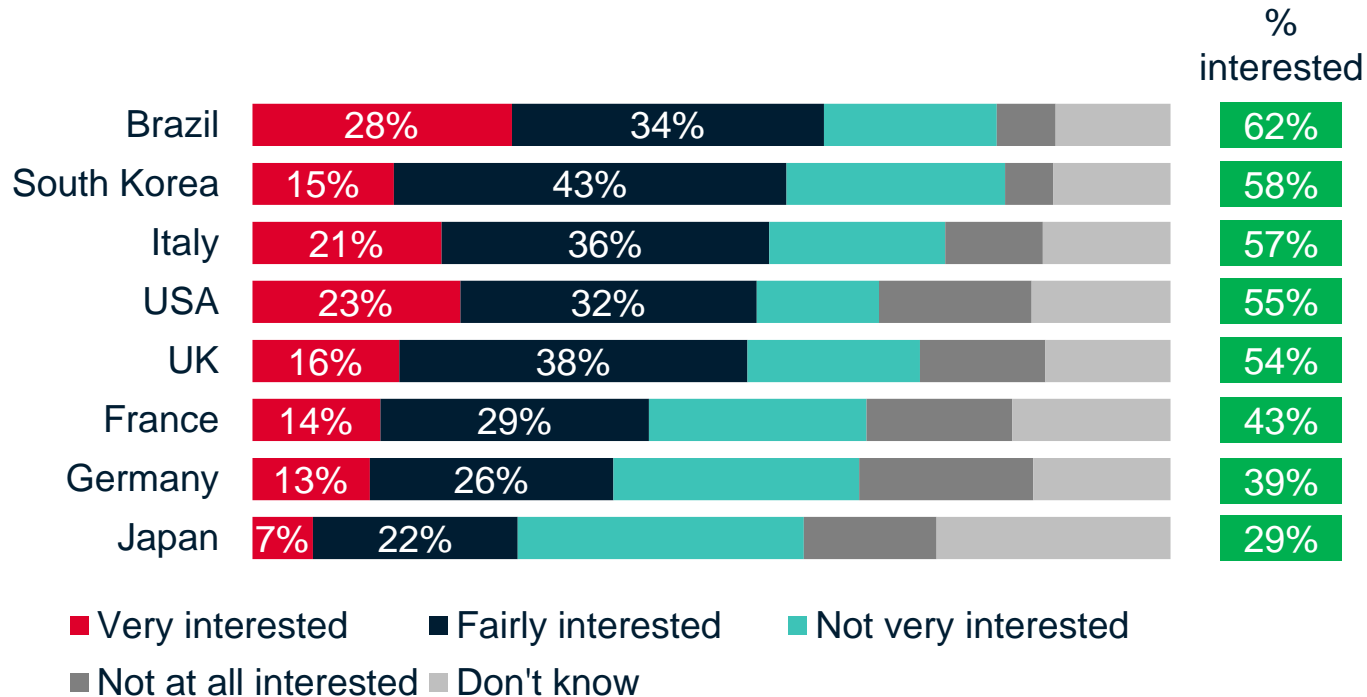
- OEMs talk more than operators, especially in the USA, Japan and South Korea

# Are consumers interested in using eSIM?

*50-50: half of consumers are interested (average)*

## Consumer interest in using eSIM on a mobile phone at some point in the future

Percentage of total surveyed consumers who own/use a mobile phone



- Significant variations by country...
- ...but (again) no correlation with eSIM service availability
- 16% don't know (average)...fairly high share
- No major differences by smartphone brand

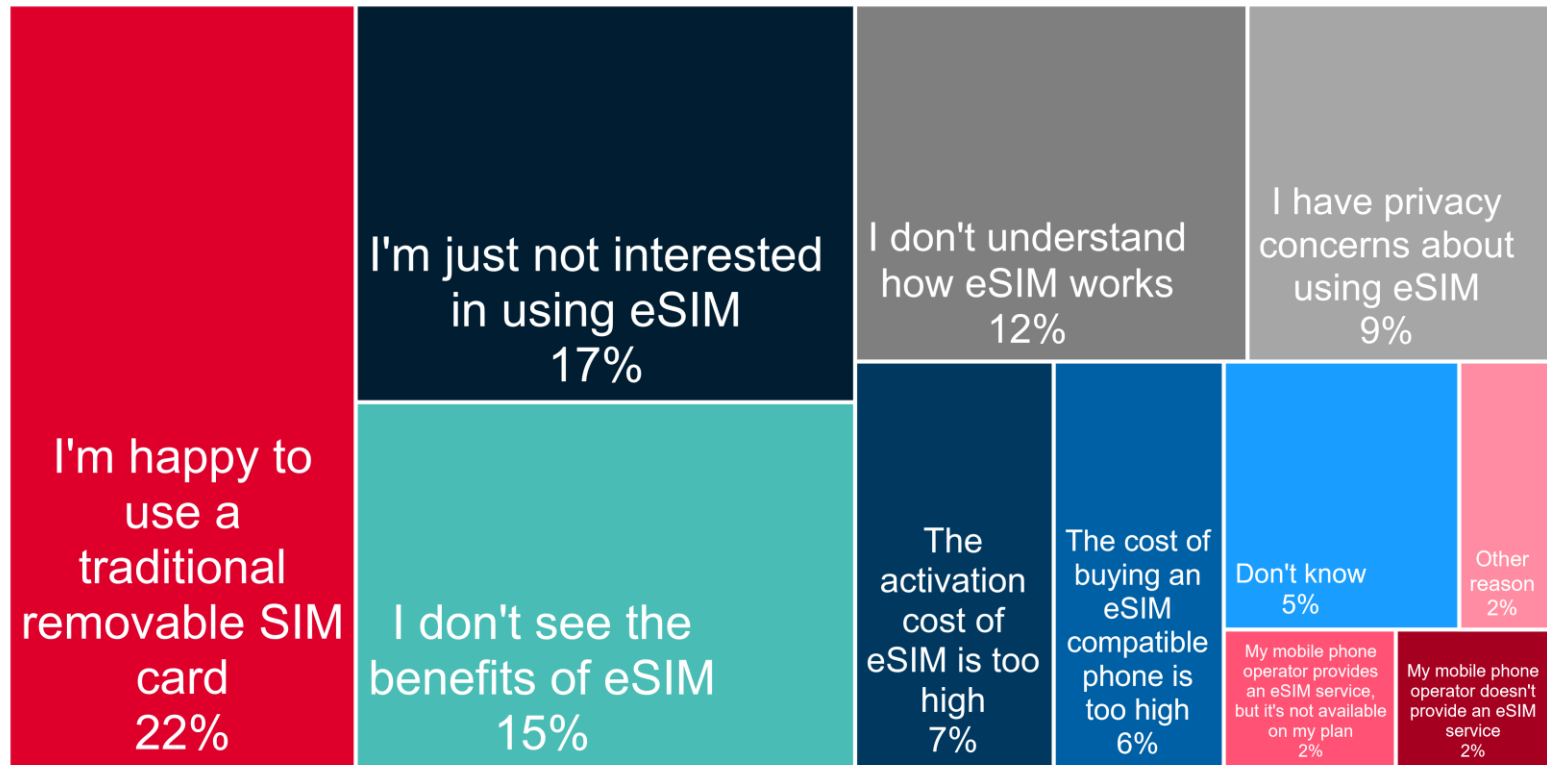


# Why are some consumers not using/interested in eSIM?

*Various reasons – it means multiple challenges*

## Reasons for not using eSIM or not being interested in eSIM

Percentage of surveyed consumers who are not using eSIM or are not interested in using eSIM (aggregate, 8 countries)



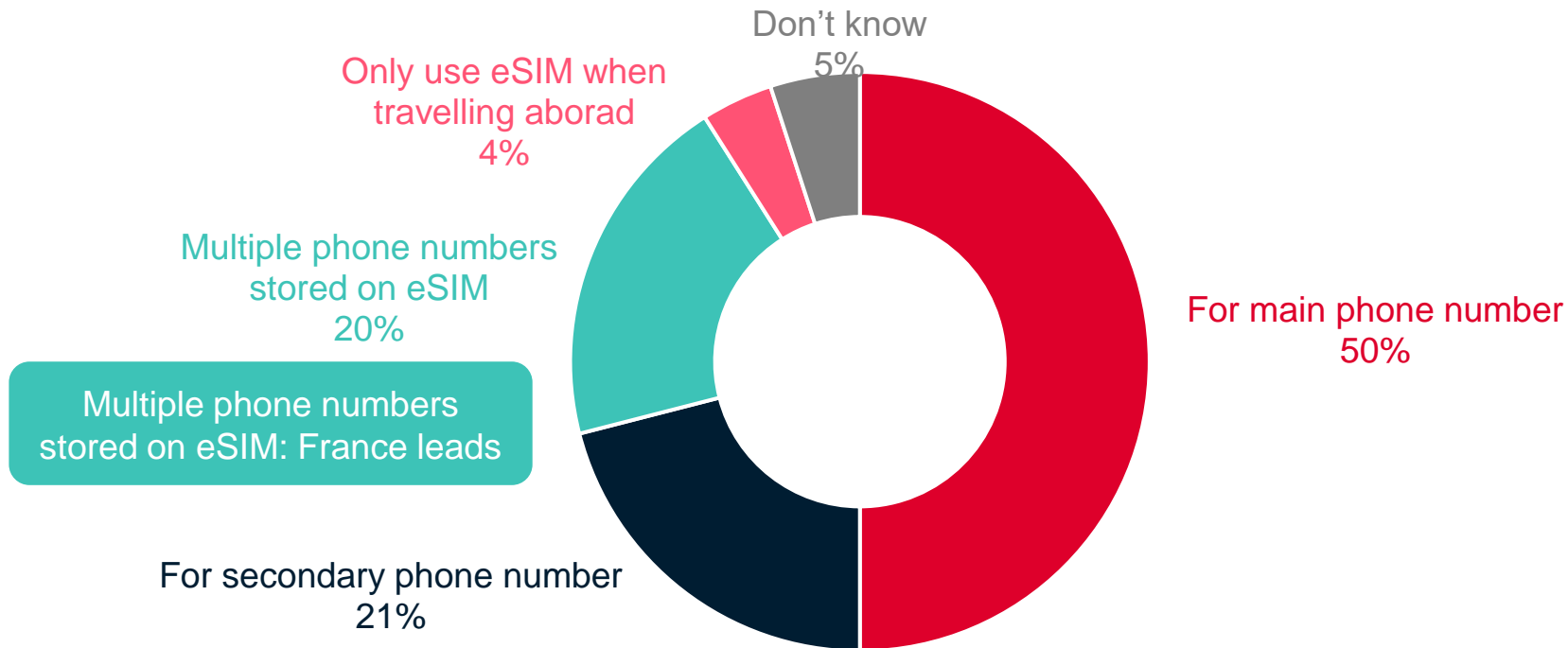
- Happiness with traditional SIM leads, especially in Europe
- 15% don't see the benefits of eSIM
- 12% don't understand how eSIM works

# How do consumers use eSIM?

*For main phone number*

## Use of eSIM in mobile phones

Percentage of surveyed consumers who use eSIM (aggregate, 8 countries)

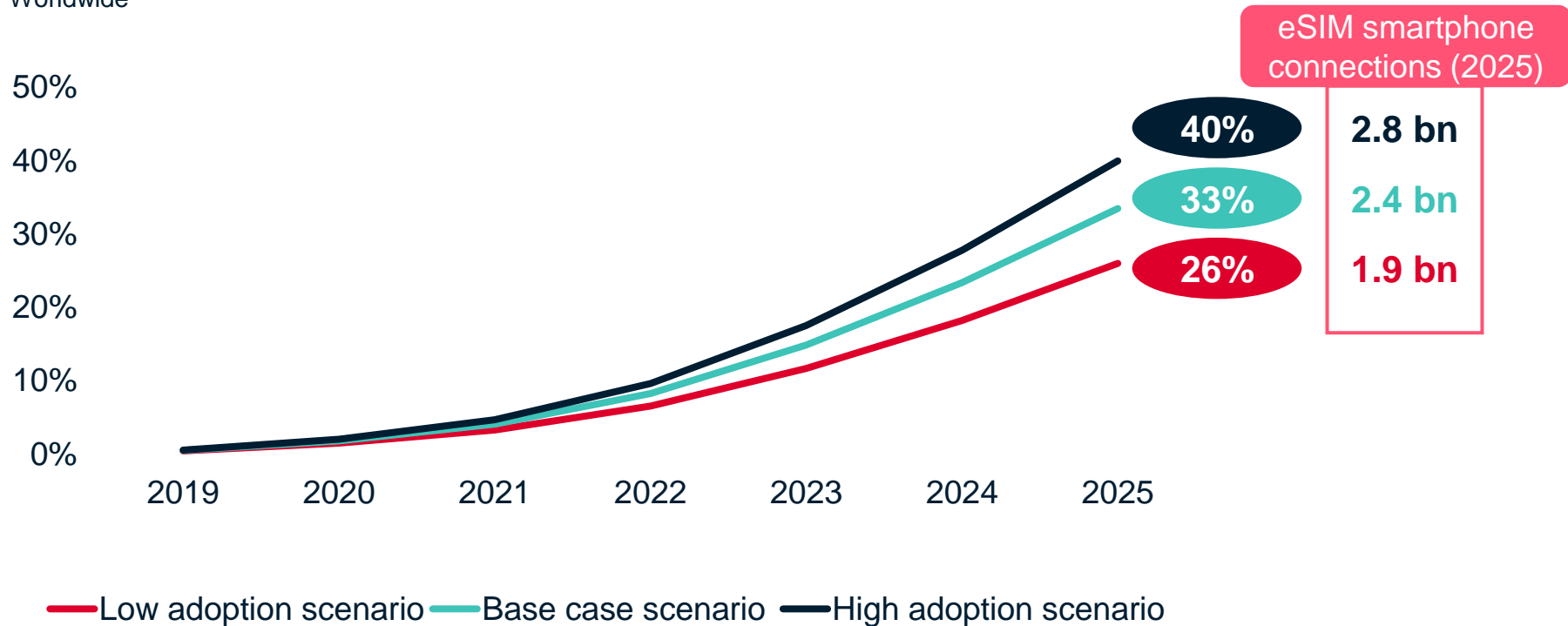


# Charting the future: eSIM adoption in smartphones

*The march towards mainstream – Acceleration from 2023 onwards*

## eSIM smartphone connections as % of total smartphone connections (installed base)

Worldwide



# eSIM

Future outlook: what could  
accelerate eSIM adoption?



### eSIM in the Consumer Market

- OEMs and operators raising consumer awareness of eSIM and promoting its benefits
- Enhancing user experience for eSIM activation and service management
- Full launch by all OEMs
- Transition to eSIM-only smartphones
- China launching commercial eSIM service for smartphones
- Migration to 5G: opportunity to push the transition to eSIM

### eSIM in the Enterprise Market

- Adoption of global standards/specifications (as opposed to proprietary solutions)
- 5G adding momentum to the use of cellular connectivity for IoT – hence pushing eSIM
- The combined effect of eSIM- and iSIM-based solutions
- eSIM helping address key IoT deployments challenges (integration with existing technologies, cost of implementation and security)
- IoT companies having a clear eSIM strategy alongside their main IoT proposition



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# eSIM Summit: eSIM Adoption and Global Market Trends

GSMA eSIM Consumer



SCAN ME

GSMA eSIM M2M



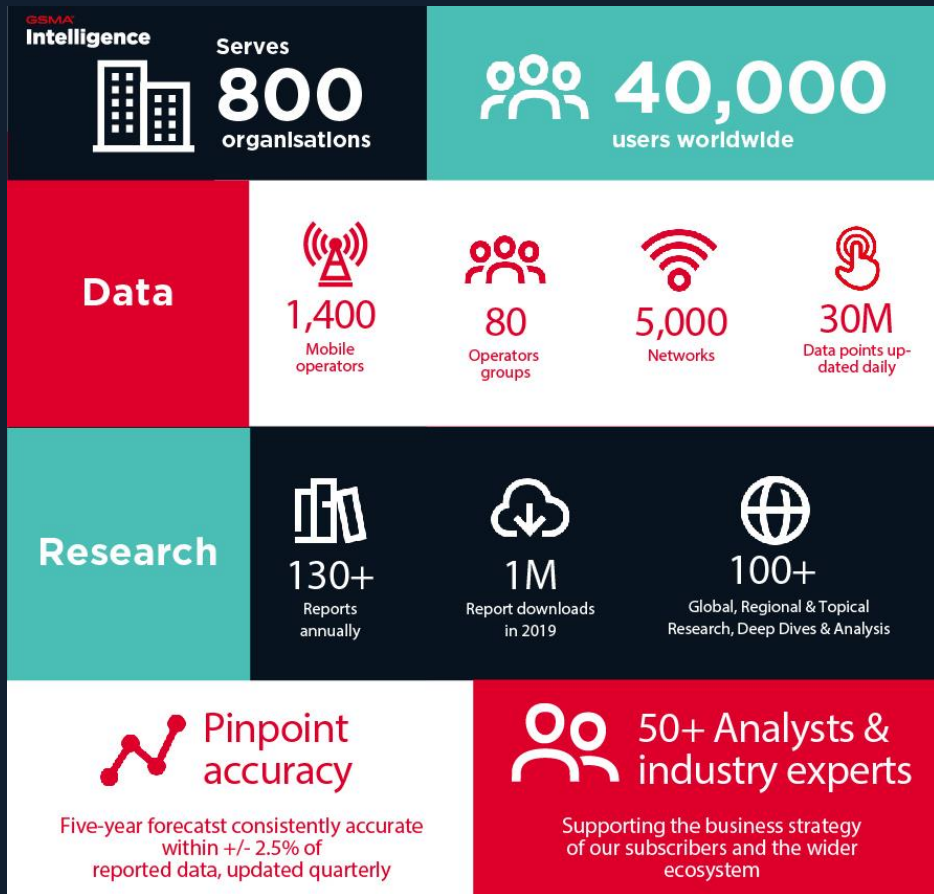
SCAN ME

GSMA eSIM Service

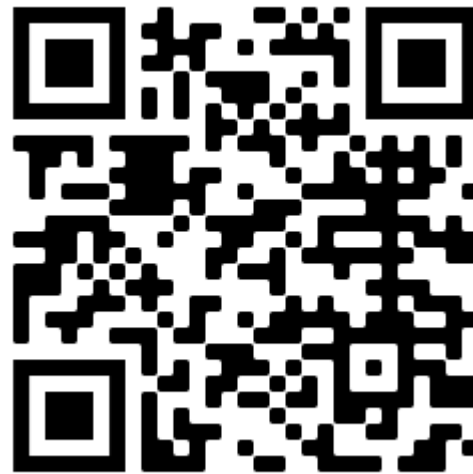


SCAN ME

# About GSMA Intelligence



[info@gsmainelligence.com](mailto:info@gsmainelligence.com)





# THANK YOU!

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Pablo Iacopino

Head of Research and  
Commercial Content

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**MARCO BIJVELDS**

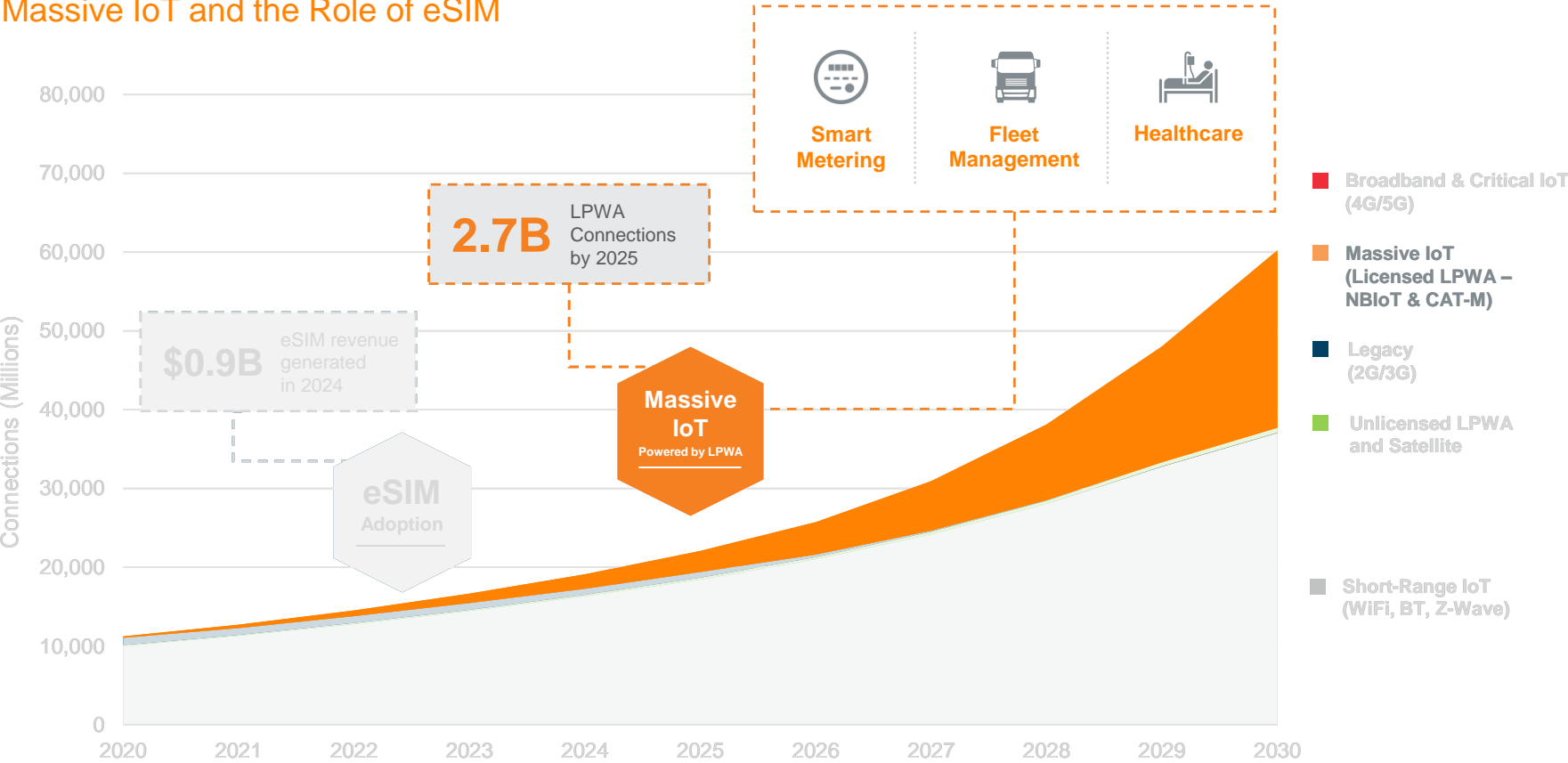
SVP, EAP  
KORE

## AGENDA .....

- 1** Can eSIM be the Linchpin of Massive IoT?
- 2** KORE discusses where this technology fits in opening the globe to extensive IoT enablement, and how to optimise a technology that is rapidly developing in a competitive market.

# The State of Connectivity

## Massive IoT and the Role of eSIM



# Industry and Customer Drivers to eSIM

## Network Sunsets



## Permanent Roaming



## Supply Chain



Connected vehicles  
Autonomous vehicles  
Connected asset tracking



Connected medical equipment  
Police bodycams  
Remote patient monitoring



Environmental monitors  
Infrastructure monitors  
Connected water meters



# Mitigating Roadblocks in Massive IoT with eSIM



# Finding the True eSIM



## What Characteristics Sets Apart the Real eSIM?

- eSIM or eUICC
- GSMA version and features
- Switching options
- Device compatibility
- Carrier availability
- Multi-vendor compatibility

# 5 Stages to eSIM Deployment

1

Strategy &  
Business Case

2

Technology &  
Connectivity  
Options

3

Technical &  
Operational  
Readiness

4

Deployment of  
eSIM  
Connected  
Devices

5

Management  
of Connectivity  
and Profiles

# eSIM as the Linchpin to the Future

The KORE logo features the word "KORE" in a bold, sans-serif font. The letter "O" is stylized as a circle with a horizontal gradient from orange to red.

Global eSIM Connectivity

The Kigen logo consists of a blue icon of three chevron-like shapes pointing left, followed by the word "Kigen" in a blue, sans-serif font.

OPEN IoT SAFE



energy web

Blockchain



**MARCO BIJVELDS**  
SVP, EAP – **KORE**



**LOIC BONVARLET**  
VP PRODUCT AND  
MARKETING – **KIGEN**

## AGENDA .....

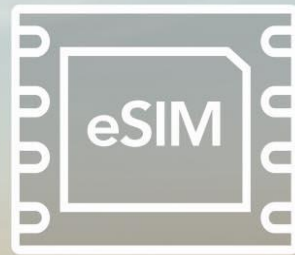
1

eSIM in Action: How to accelerate and keep Massive IoT SAFE?

2

KORE and Kigen address adoption and acceleration of eSIM and how to make most of standards-based security schemes such as IoT SAFE.





**KORE**®

 **Kigen**



# THANK YOU



# SCAN ME



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Part 2 - eSIM Revolution







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# eSIM Summit: eSIM Adoption and Global Market Trends

## Part 2 – eSIM revolution

The inconvenient truth –  
6 years as an eSIM partner with Apple

TRUPHONE

Unleash the power of the eSIM

THALES



# eSIM Summit at MWC22

The inconvenient truth – 6 years  
as an eSIM partner with Apple

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KEYNOTE SPEAKER  
**Michael Moorfield,**  
Chief Technology Officer,  
Truphone





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KEYNOTE SPEAKER  
**Antoine Thomas,**  
eSIM solutions Director,  
Thales DIS



KEYNOTE SPEAKER  
**François Bogusz,**  
Digital Telco Director  
Thales DIS



# eSIM Summit at MWC22

The inconvenient truth – 6 years  
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# THE INCONVENIENT TRUTH



**TRUPHONE**

6 years as an eSIM partner with Apple



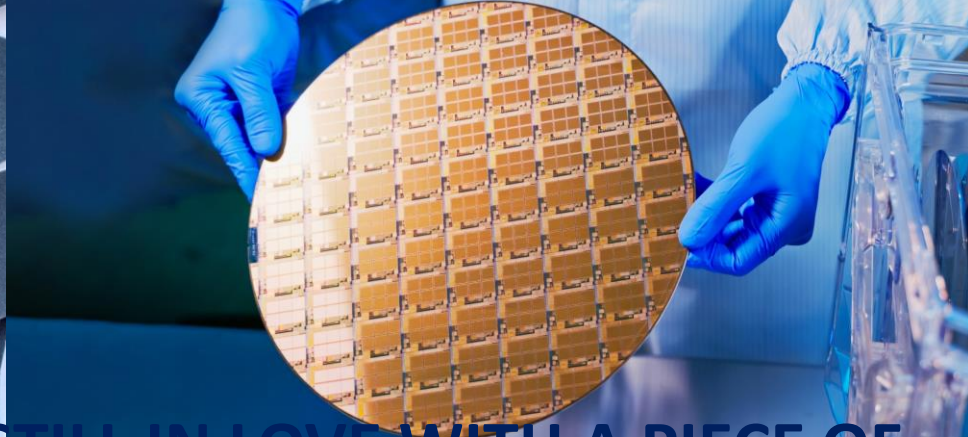
IT ALL STARTED  
WITH AN iPad...



6 YEARS ON  
eSIM IS NOW AT THE HEART  
OF EVERY FLAGSHIP  
CONSUMER DEVICE







## HOWEVER, THE INDUSTRY IS STILL IN LOVE WITH A PIECE OF PLASTIC

We are just as reliant on the SIM card today as we were 6 years ago.





Replying to @mike\_fan



Hello, thanks for reaching out. Currently, we don't support eSIM transfer yet. So you will need to buy a new eSIM from our store. :) Hope this helps. bk



Replying to @mike\_fan



It's definitely on the cards this year - our tech peeps haven't finalised a date but as soon as we'll let you know! LJ

# AND WE ARE HOLDING CUSTOMERS BACK...



Replying to @mike\_fan



Following a successful trial in a small number of retail stores, we're pleased to tell you that we will be launching eSIM in 2022. We don't have a date right now, but rest assured we'll inform you when this is available for both consumer and business customers. -Iain



Replying to @mike\_fan



Please note we currently support eSIM for cellular capable, wearable devices only. Please view more here:



...AND WHAT'S THE HOLD UP?





NOT ENOUGH DEVICES  
SUPPORT eSIM

eSIM WILL BE AVAILABLE  
JUST AFTER OUR DIGITAL  
TRANSFORMATION IS  
COMPLETED

eSIM WILL DESTROY  
ROAMING REVENUES

OEM'S WILL BECOME  
THE GATEKEEPER  
BETWEEN OUR NETWORK  
AND THE CUSTOMER

# THE MAGPIE



# THE BULL



WHERE DO YOU SIT?

# THE OSTRICH

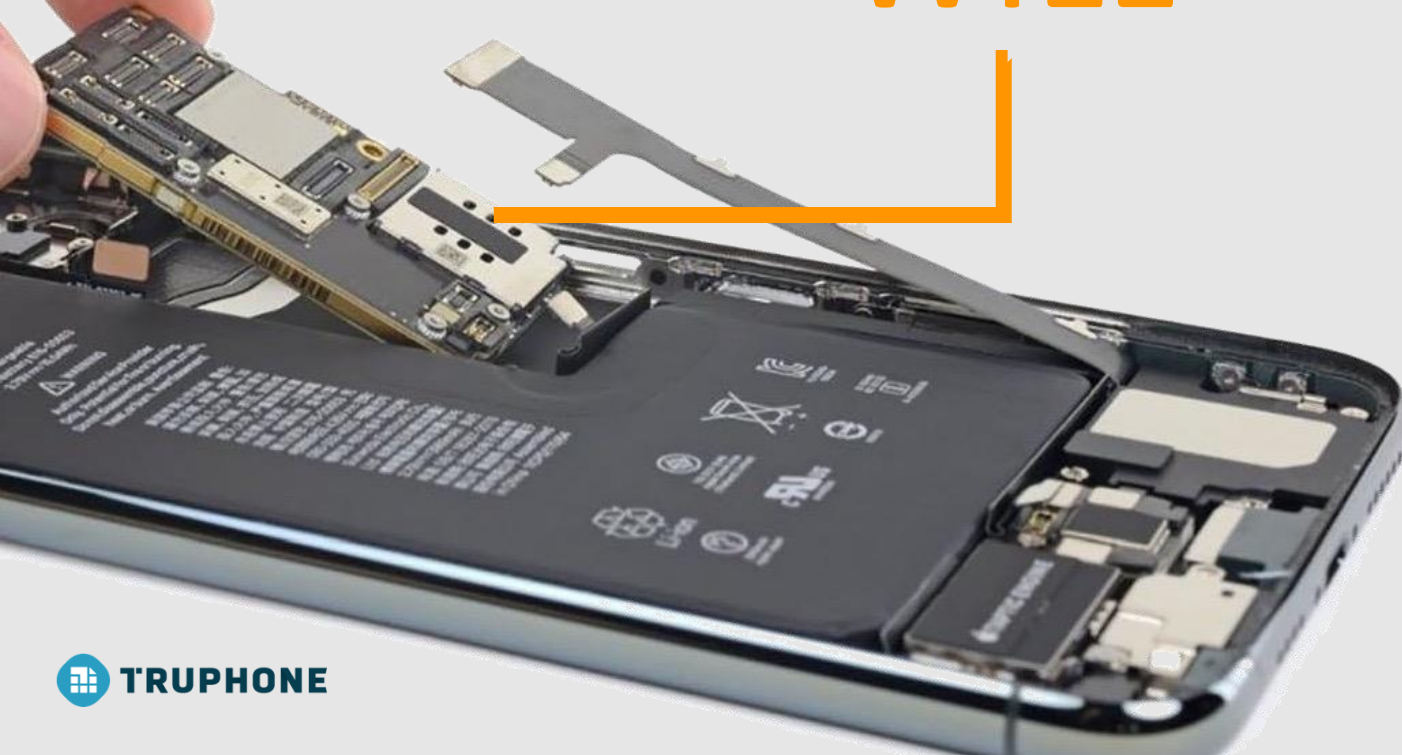


# THE GOAT



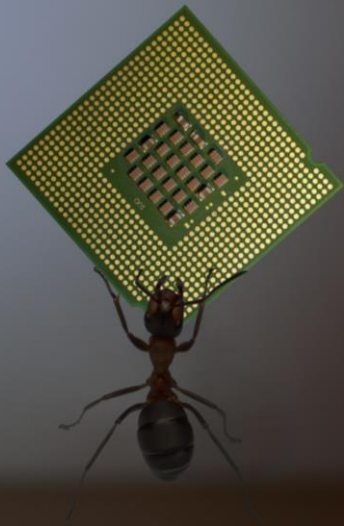


THE INCONVIENT TRUTH IS:  
THE SIM SLOT **WILL** DISAPPEAR



# WE BELIEVE IN THE eSIM PROMISE

Smaller, efficient and  
faster devices



Simple logistics  
and reduced  
distribution costs



Choice and flexibility  
for customers







# eSIM IS SAVING MONEY



# eSIM IS ENABLING NEW EXPERIENCES

```
// Launch Truphone Connect
const Connect = require('./connect.js')
const connect = new Connect({})

// New connectivity for any eSIM on the planet
connect.orderSim("89049032007008882600011111111111") ,
    null, (results) => {
    console.log("Hello New Connected World");
}

// Your new eSIM is on it's way!
```



SETTINGS

now

**Cellular Plan Ready to Be Installed**

Tap this notification to finish your Cellular plan set up.



TRUPHONE





# eSIM IS MAKING THINGS EASIER

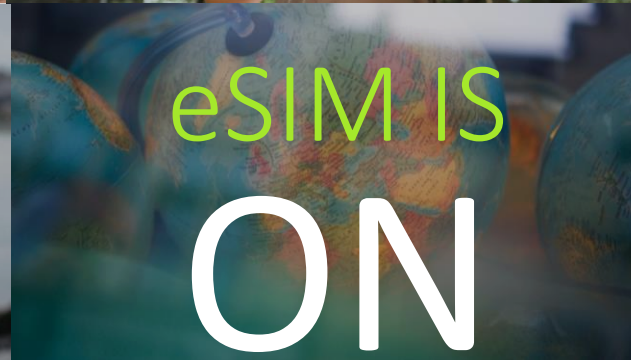
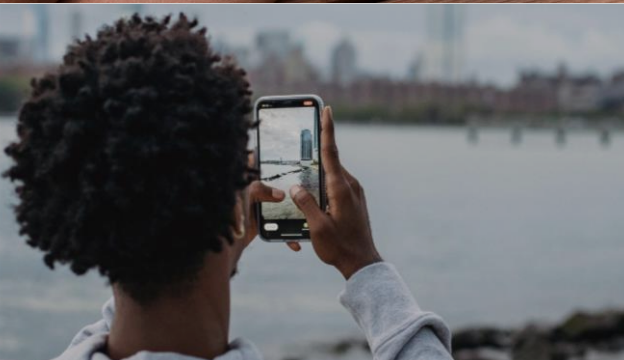




And we are at the forefront  
of this acceleration

0 TO 18M eSIM  
ACTIVATIONS  
IN 3 YEARS

14-Mar-22



# THE WORLD's most complete eSIM solution



Business and IoT  
solutions



Consumer apps



Connect API

Full ownership of the entire eSIM ecosystem for future proof connectivity



Entitlements



RSP



SIM OS



Bootstrap

IF NOT  
NOW  
THEN  
WIN



Visit us at Stand 5A32, Hall 5





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Unleash the power of eSIM

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*Unleash the power of eSIM*

**eSIM summit at MWC 22**



# Multiple devices types need connectivity

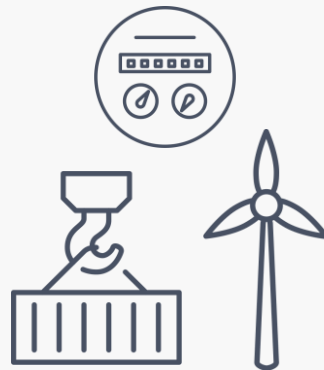
## CONSUMER ELECTRONICS



## Consumer IoT



## Industrial IoT



## M2M



**Secure**



**Miniaturized**



**Robust**



**Digital**

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# The IoT market needs



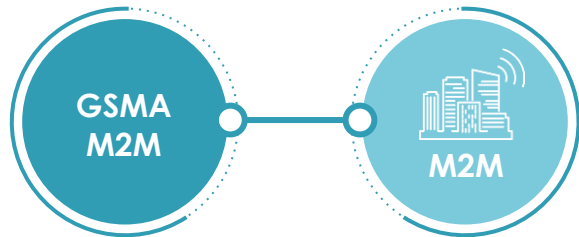
## Design constraints

- Miniaturization
- Low power consumption
- Out-of-the-box cellular connectivity

## Services

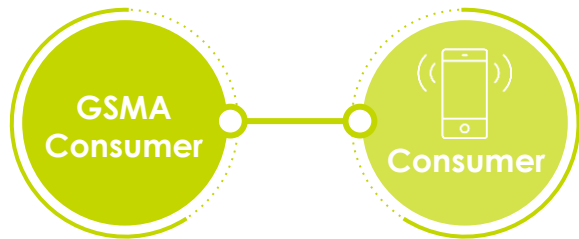
- Scalable
- Cost effective
- Secure
- Device & Connectivity management

# IoT dilemma: How to boost cellular connectivity for IoT devices?



## GSMA M2M

- Offers fleet management
- Deployment can be seen as complex



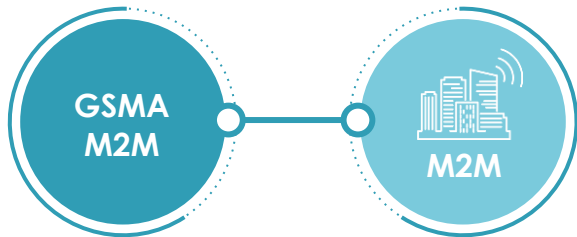
## GSMA Consumer

- Simple deployment
- Needs an End-user consent
- No fleet management

OPEN

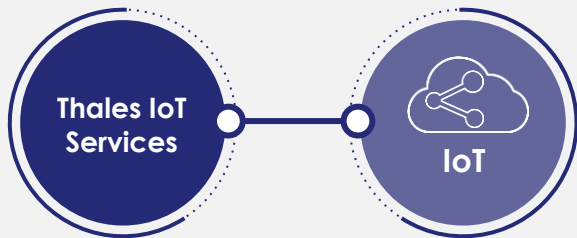


# IoT dilemma: How to boost cellular connectivity for IoT devices?



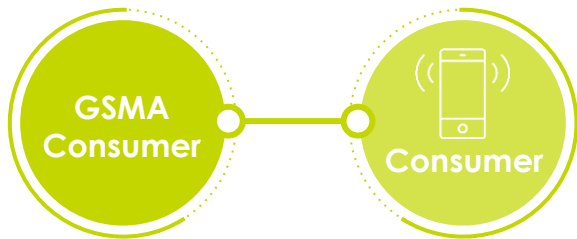
## GSMA M2M

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## Thales for IoT

- Relies on the Consumer eSIM ecosystem (SM-DP+)
- Leverages on the best of the two models Consumer & M2M



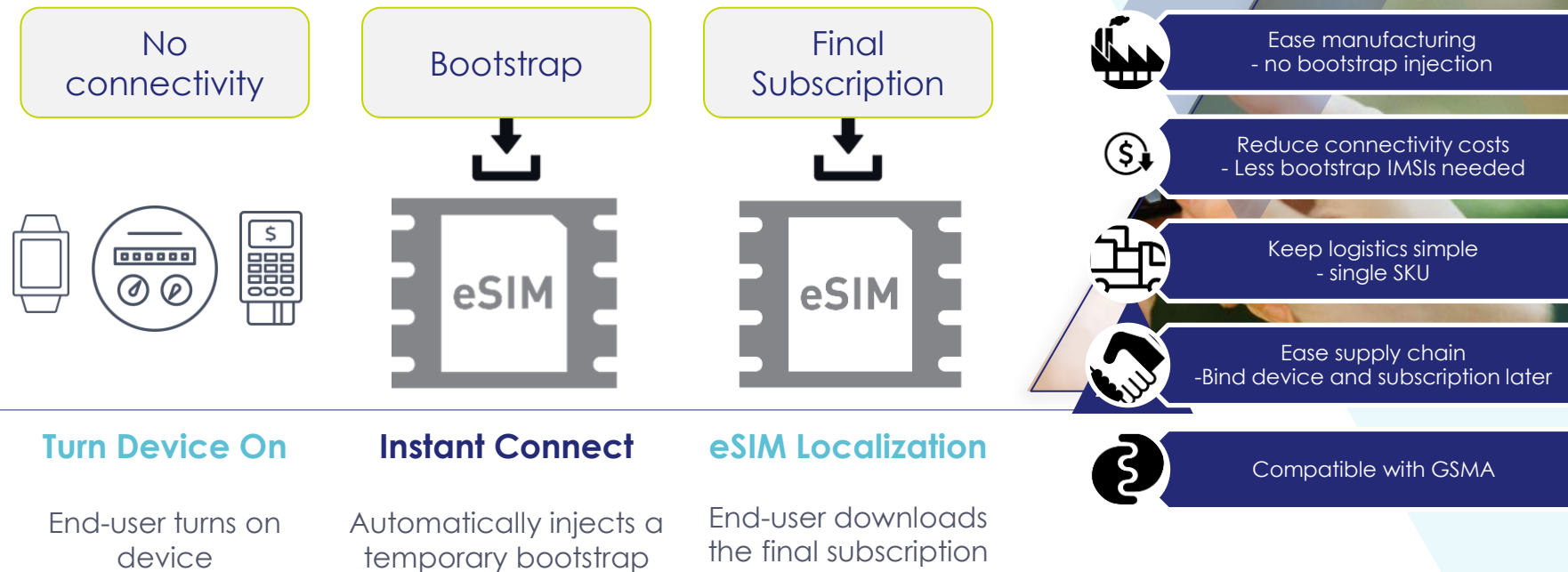
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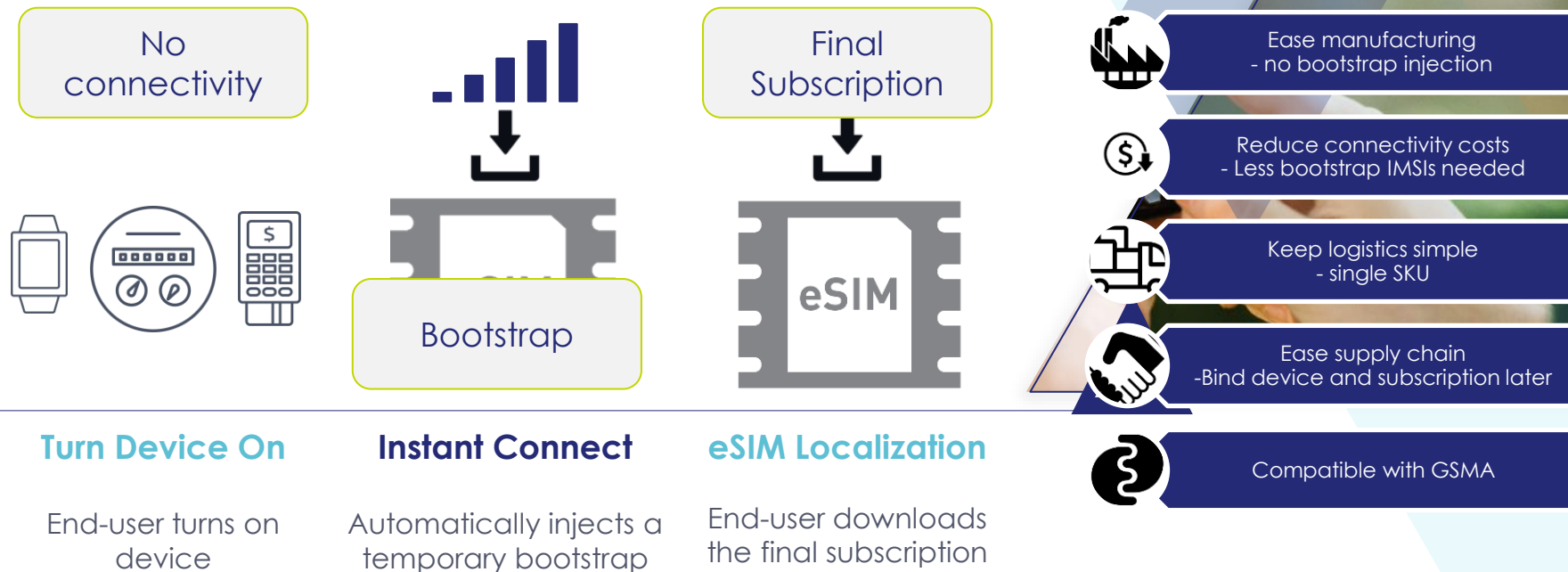
# Thales Instant Connect

Bootstrap connectivity for eSIM localization  
available in 186 countries with 383 roaming partners



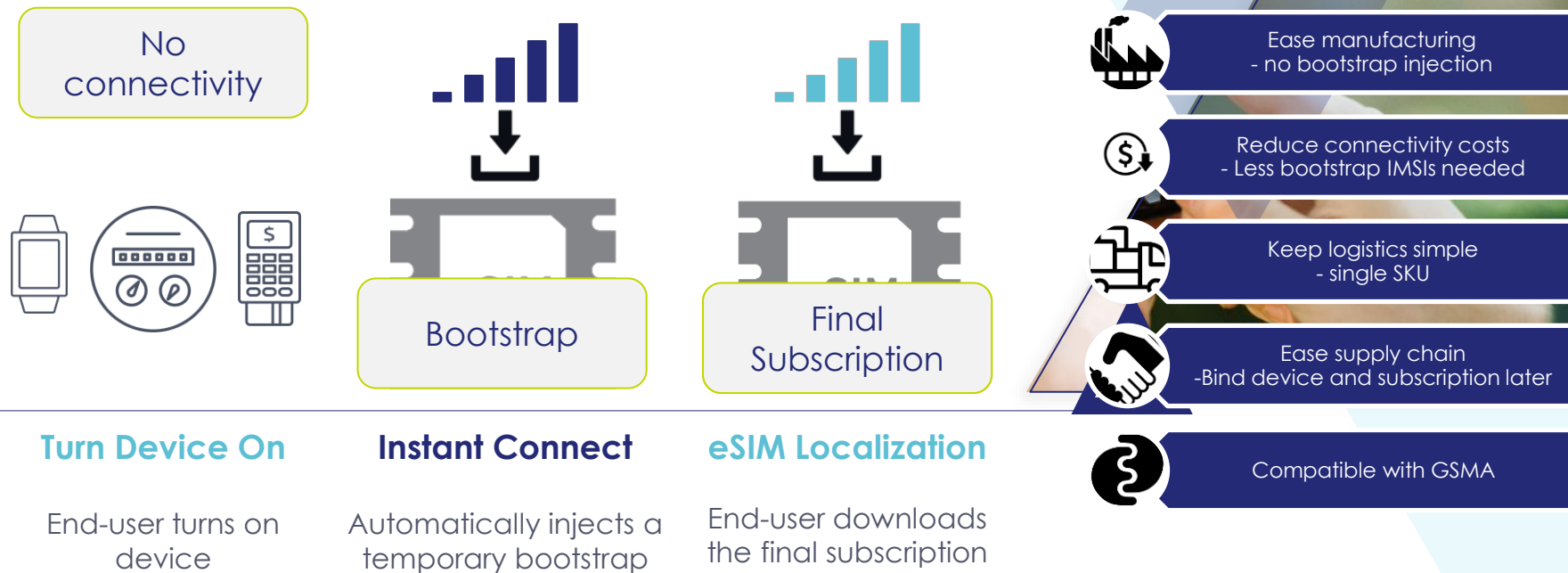
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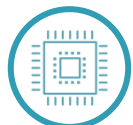
# Thales Instant Connect

Bootstrap connectivity for eSIM localization  
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# "MAKE THE IoT CONNECTED WORLD A PLACE WE CAN ALL TRUST"



## eSIM / iSIM

Smartcard software packaged to be embedded into devices at manufacturing time



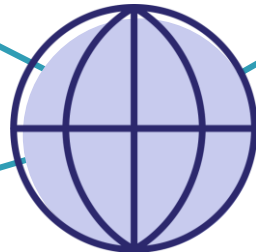
## eSIM Cloud Platform

Service to MNOs, OEMs and SPs to remotely distribute and manage cellular subscriptions



## Thales Adaptive Connect

A connectivity management service to allow enterprises to manage their IoT devices



## Thales Instant Connect

Bootstrap connectivity to enable eSIM localization

Join us at MWC Barcelona 2022

28 February - 3 March 2022 | Hall 2 - Stand 2J30



“  
Thank you  
”





## Trusted Digital Telco

*Unleash the power of eSIM to launch  
your digital-first brand*

**eSIM summit at MWC 22**

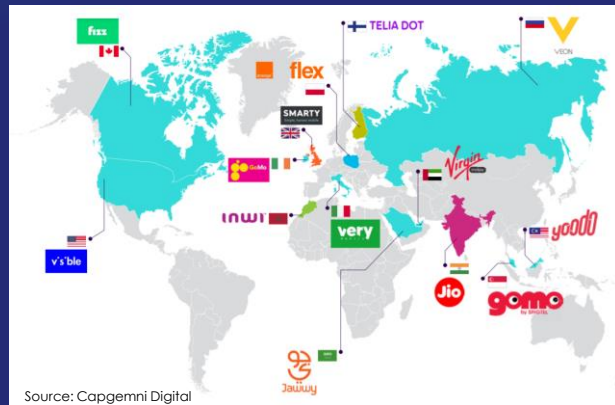


# A Bigger Digital Transformation for Telco

## Digitization



**Empower** customers by providing a full service mobile app



Source: Capgemini Digital Operator Observatory

Go **cloud-native** to reduce deployment time & cost-to-acquire and cost-to-serve

Get rid of legacy IT Stack and adopt a **greenfield approach**



# Anywhere, Anytime, in a Snap !

**THALES**  
Building a future we can all trust

eSIM



eKYC

Thales & triPica assembled best of breed technologies to create:  
**Trusted Digital Telco,**  
**« A telco-in-an-App experience »**

**A 100% Digital  
and Simple  
Customer  
Experience**

**triPica.**



digital  
BSS

**I order  
in 4 clicks**



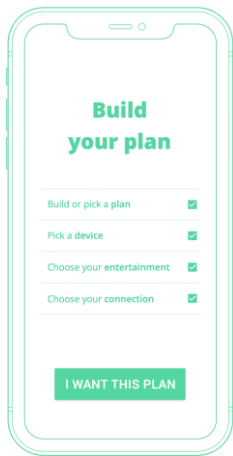
**I scan  
my documents**



**I get all my  
answers online**



# Customer Empowered to Build, Enroll and Manage His/Her Services



## Define

Build your plan



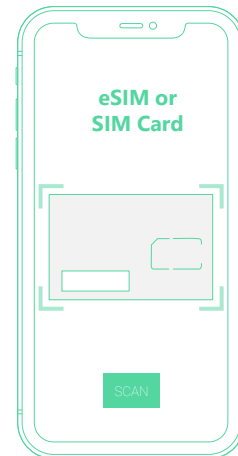
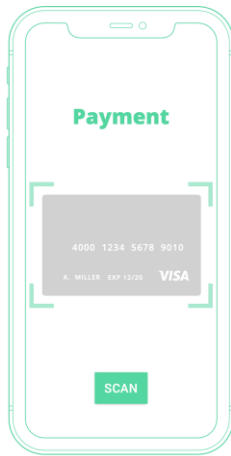
## Be Enrolled / Buy

### Prove ID

Take a selfie and scan the relevant identification document

### Pay

Scan your Banking Card and authorize payment



## Start Using Your Service

### SIM/eSIM card

For eSIM enabled devices the activation is done in instants after enrollment

**Make changes at any time**  
selfcare/support

Digital BSS  
Agent Tool: CRM  
Analytics : BI & Reporting

# One Step Ahead of the Disruptors

> Implement your Digital Brand in

4 Months

> Give the tool to your Marketers to launch a marketing offer in

48h

> Enroll a new customer in less than

7mn

**THALES**  
Building a future we can all trust

**triPica.**

**THALES**  
Building a future we can all trust



“  
Thank you  
”







# eSIM Summit at MWC22

eSIM Adoption and  
Global Market Trends

**Theatre 3 - Hall 7**  
**Wednesday 2 March 2022**  
**10.30-12:30 (GMT+1)**

Closing session





**MWC™**  
Barcelona

# eSIM Summit: eSIM Adoption and Global Market Trends

**GSMA eSIM Consumer**



**SCAN ME**

**GSMA eSIM M2M**



**SCAN ME**

**GSMA eSIM Service**



**SCAN ME**



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# THANK YOU



