MWC GSMA | In partnership with ctia™

LAS VEGAS
SEPTEMBER 26 – 28
2023

How eSIM is boosting connected industries

Tuesday 26 September 2023, 11:30 - 13:30
Las Vegas Convention Center, West Hall 300,
Theatre 2 W220

Platinum: IDEMIA

Gold: Valid KORE TEAL



GSMA Intelligence

MWC GSMA

How eSIM is Boosting Connected Industries

eSIM - New developments and market trends

DATE
26 September 2023

Yolanda Sanz, eSIM Working Group Director, GSMA

GSMA Intelligence

eSIM looking for scale

Some of the latest trends we see in the market

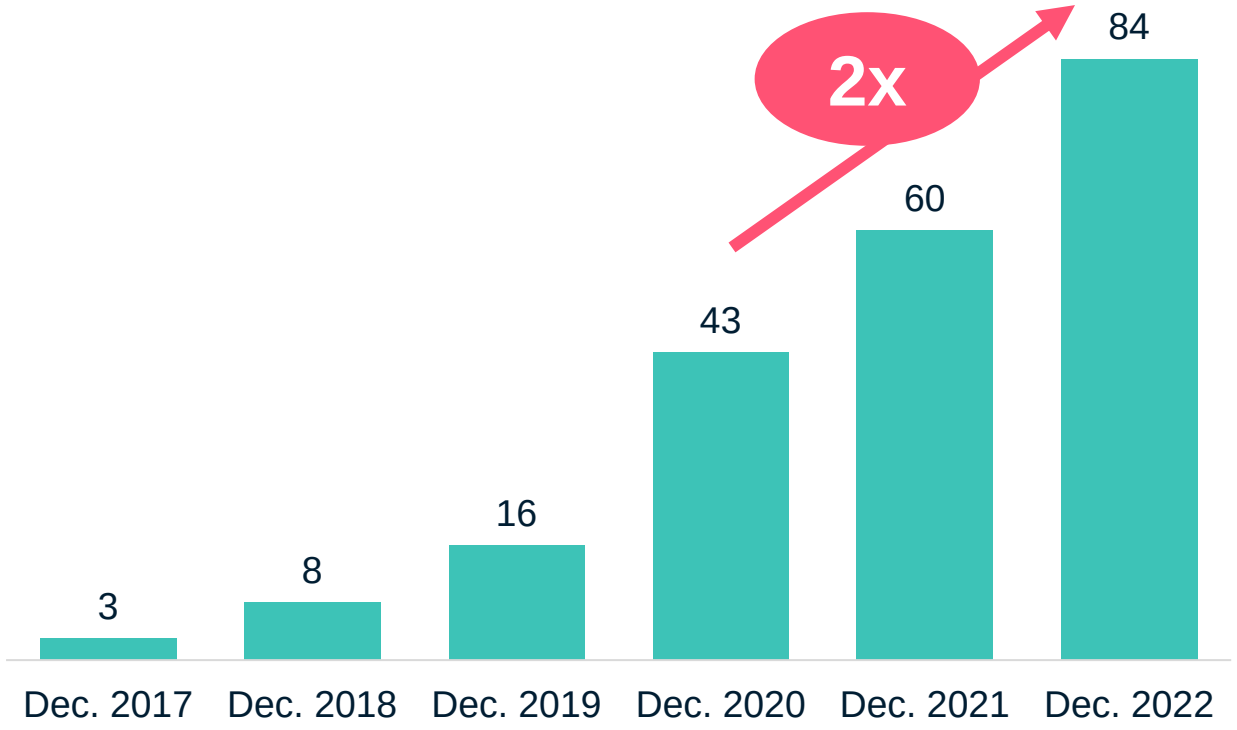
1. The launch of eSIM-only iPhones in the US in September 2022 has accelerated eSIM deployments and commercial launches globally
2. Consumer awareness of eSIM is growing, but adoption remains low. Customer transition to eSIM takes time!
3. Operators (MNOs and MVNOs) have started to talk more about eSIM to customers
4. IoT: eSIM making inroads into private networks while seeking scale beyond connected vehicles
5. Ecosystem work on global specifications continues, including integrated eUICC

eSIM in the smartphone market

Momentum is accelerating: eSIM-only smartphones a major milestone

How many eSIM smartphones have been launched?

Number of models commercially available for purchase



- **Major milestone for the eSIM industry:** launch of eSIM-only smartphones in the US in September 2022 (Apple)
- **Most brands are on board:** Samsung, Google and Apple have the widest portfolios of eSIM smartphone models
- **Xiaomi and Nokia new entrants in 2022**
- **Mainstream in flagship smartphones:** most flagship phones are now eSIM-enabled.
- **5G and eSIM get together:** ~70% of eSIM smartphones have 5G technology

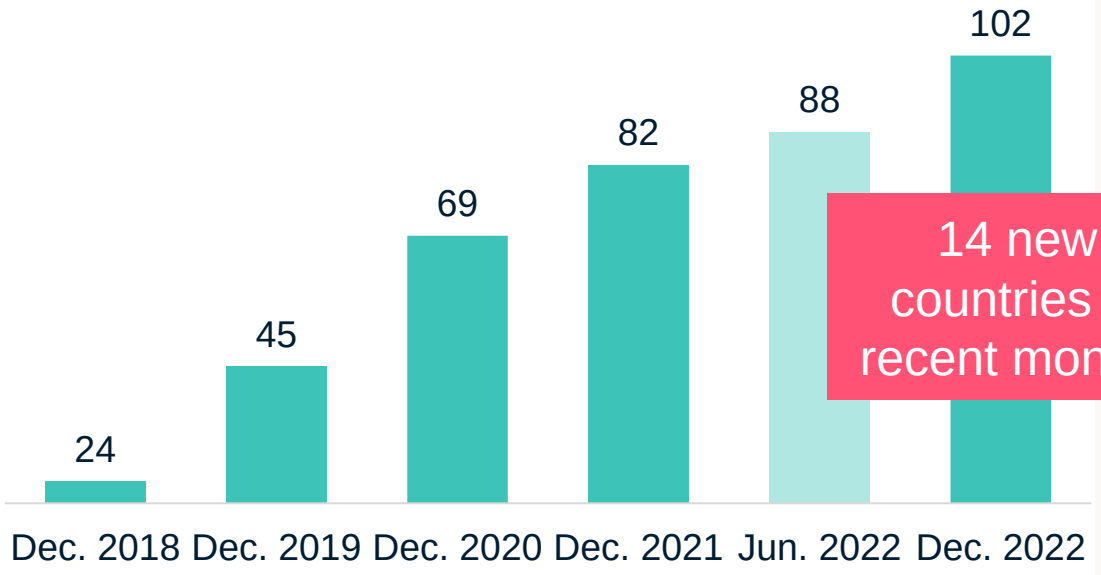
Source: GSMA Intelligence

eSIM service for smartphone is now global

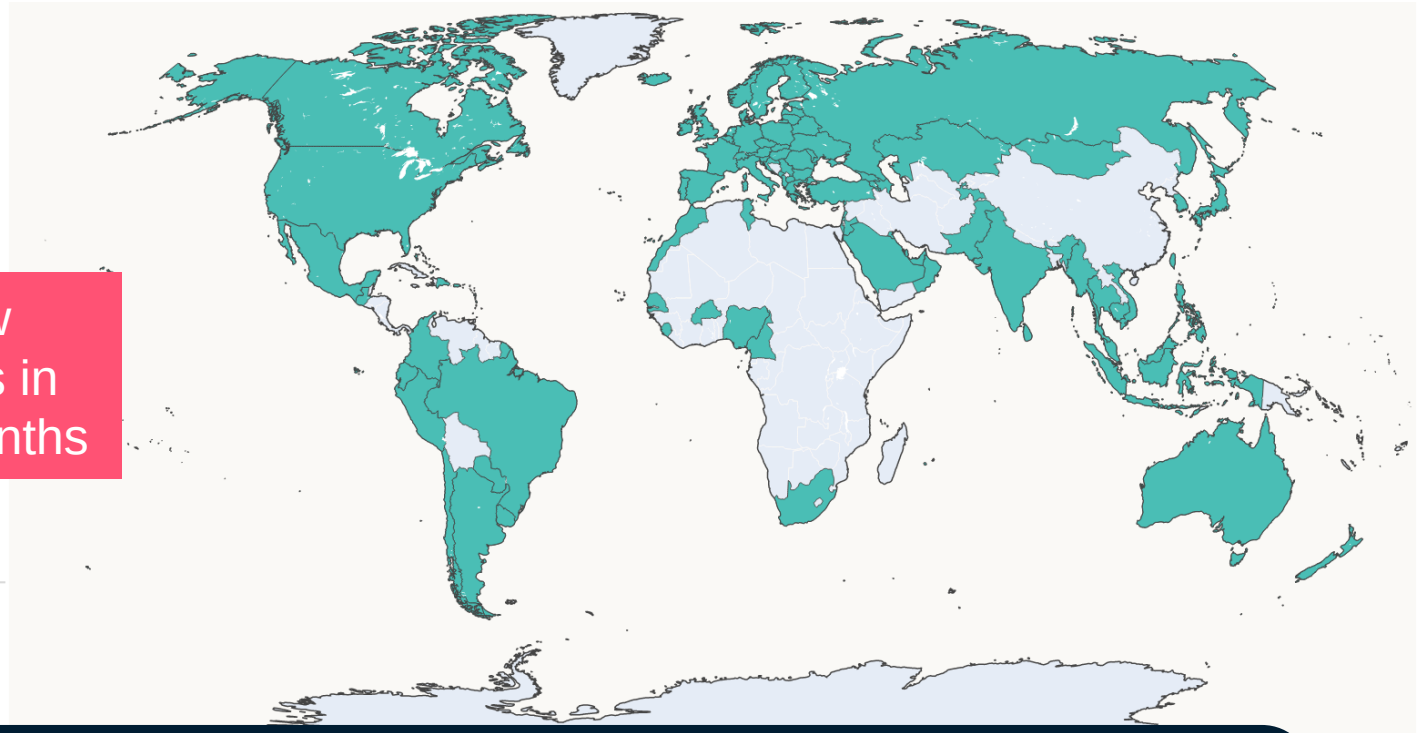
Around half the world's countries have launched eSIM service

Commercial availability of eSIM service for smartphones

Number of countries



Geographical reach



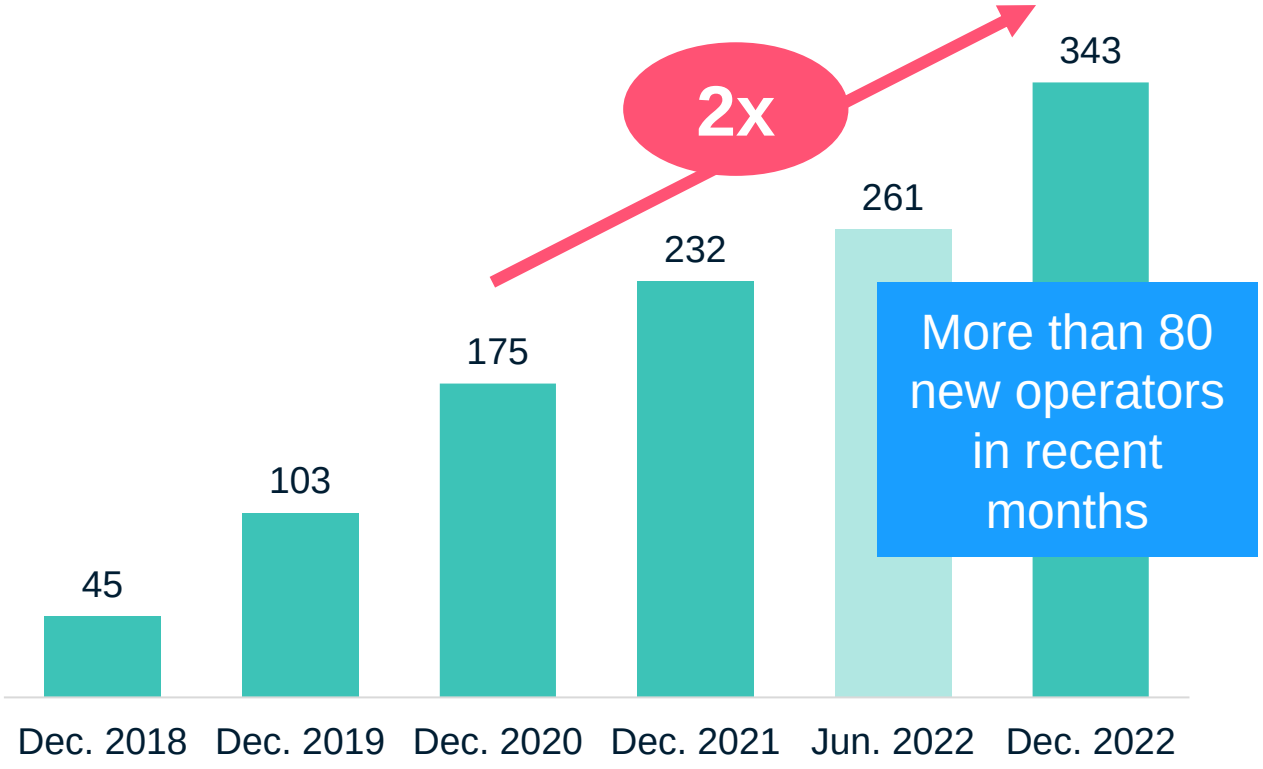
- **eSIM-only effect:** eSIM commercialisation has accelerated following the launch of eSIM-only iPhones in the US in September 2022
- **China still missing**…but for how long?

Source: GSMA Intelligence

Operators: acceleration of eSIM deployments/launches

More than 340 operators offer commercial eSIM service for smartphones

Number of mobile service providers (MNOs and MVNOs) offering commercial eSIM service for smartphones



- **Two-fold increase:** the number of mobile service providers offering commercial eSIM service for smartphones has doubled in the last two years
- **eSIM-only effect since September 2022:** a clear impact in the US and globally
- **What about the rest of operators?:** it is realistic that many of them have started working on eSIM implementation, with commercial launches coming later in 2023 or in 2024

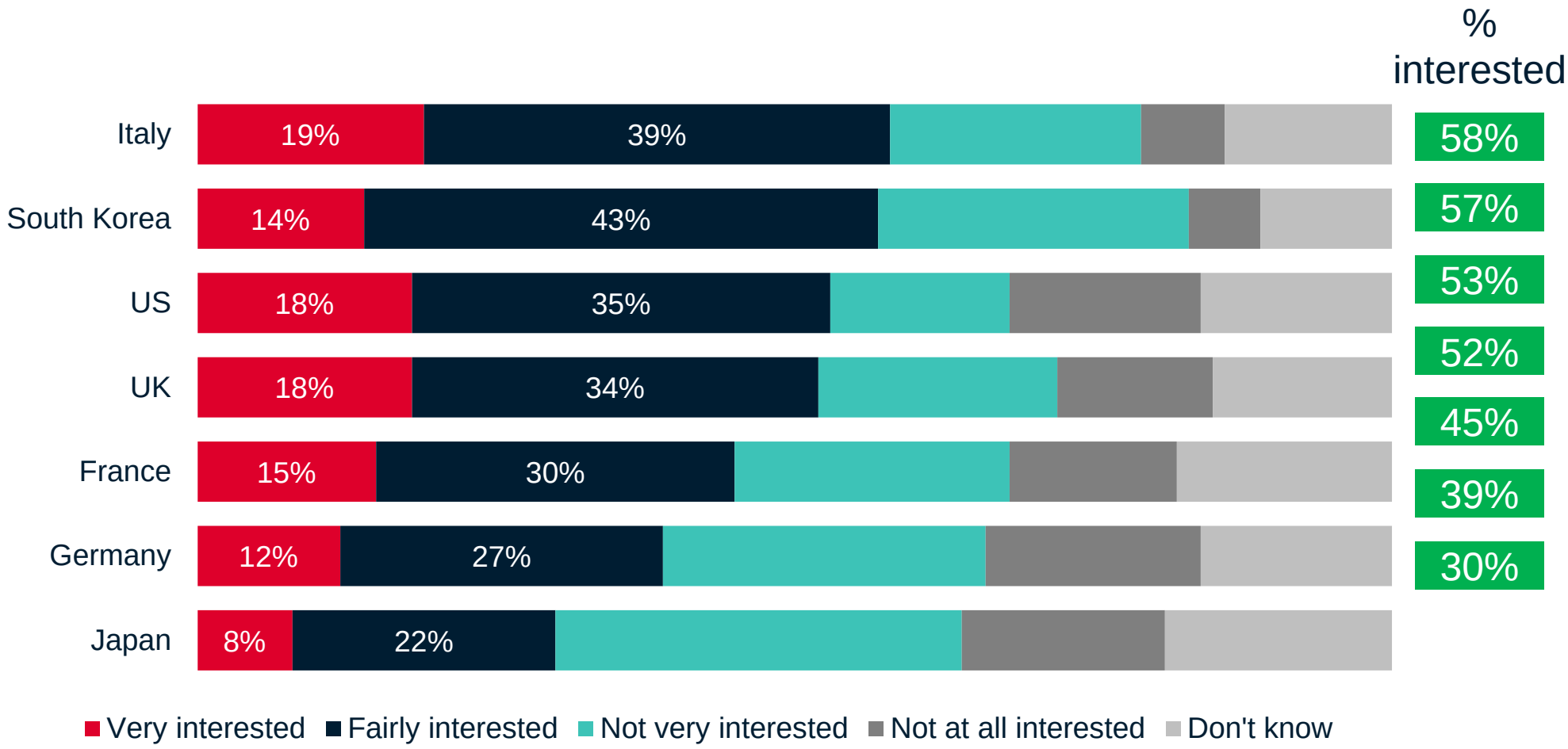
Source: GSMA Intelligence

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 consumers who own/use a mobile phone



- **50-50**…but significant variations by country
- **16% don't know**: fairly high share!

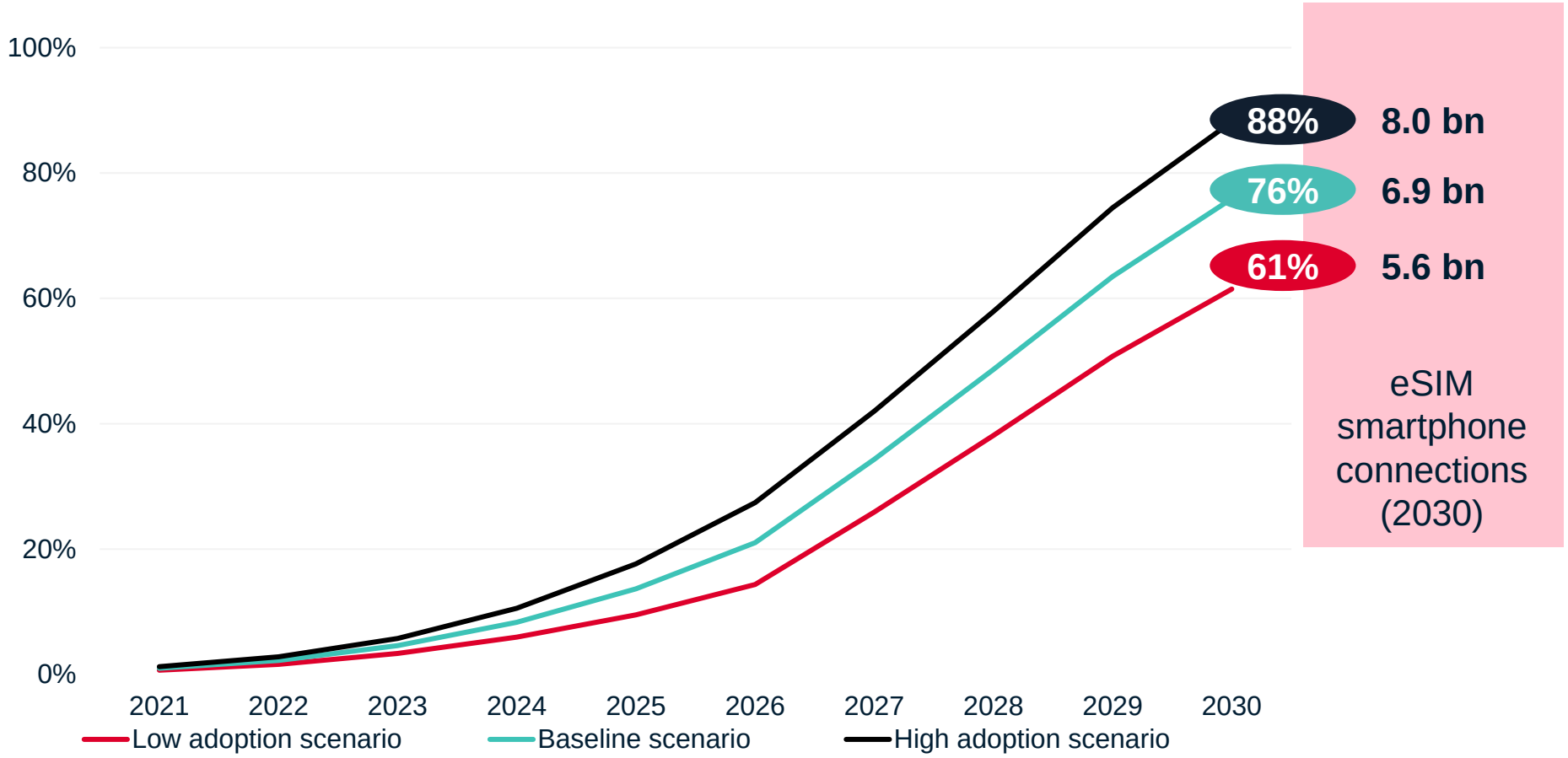
Source: GSMA Intelligence Consumers in Focus Survey 2022

eSIM adoption in the smartphone market: forecast to 2030

The march towards mainstream

eSIM smartphone connections to 2030

Percentage of total smartphone connections (installed base) globally



Key milestones: Baseline scenario (globally)

- **1 billion** eSIM smartphone connections by **2025**
- By 2028, **half** of smartphone connections will use eSIM
- North America will be leading by far **(eSIM-only effect)**. Europe follows

Source: GSMA Intelligence