

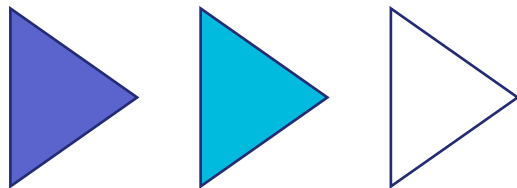
Future-Ready with eSIM:

Expanding
Opportunities for a
Connected World

eSIM SUMMIT 2025

www.thalesgroup.com

Benjamin MAZET



**Product Line Manager
of On-Demand Connectivity**

eSIM massification continues to accelerate



+55%

TRANSACTION INCREASE
worldwide in 2024



90%

SMARTPHONE SHARE
across total eSIM activations



~45%

eSIM ONLY SMARTPHONE SHARE
across total eSIM activations



60%

OF SMARTPHONE ACTIVATIONS
Generated by installed base

Source: Thales Market Intelligence

Increasing eSIM adoption opens up new opportunities



Answer subscriber needs of flexibility & personalization



SIMPLIFY
the eSIM user journey



Focus on developing new businesses



SIMPLIFY
eSIM deployment & operations



Address the rapidly growing IoT Market



SIMPLIFY
eSIM connectivity in IoT

Answer subscriber needs of flexibility & personalization



By simplifying the eSIM user journey



More digital methods



Effortless activation



Secure onboarding & management of the subscription





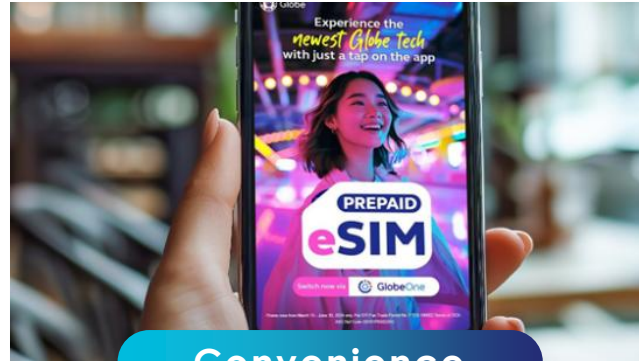
Globe: Experience the latest offers with just a tap on the app



More flexibility



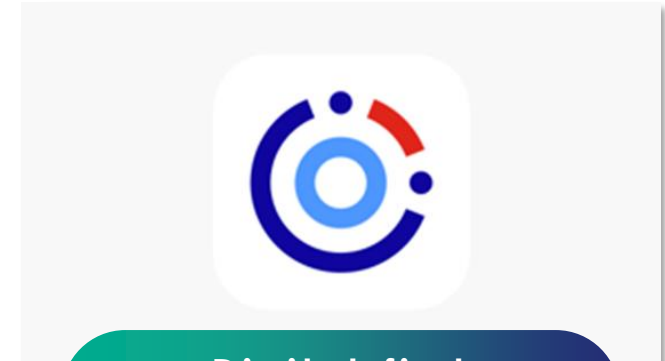
- Manage **multiple subscriptions on a single device**
- **Switch between prepaid profiles** optimized for different usage scenarios & specific needs



Convenience



- **On-Demand activation:** Instant access to connectivity
- **Ease of switching to eSIM:** **in less than 3 minutes**
- Keep the **same phone number**



Digital-first approach



- **App-centric & all-in-one experience** for eSIM users with GlobeOne App
- **Account management in one place:** from purchasing and activating eSIMs to managing promos, data, and balances.

Source: Globe Telecom

Singtel : Unlocking multiple opportunities with eSIM



Tourists

Leverage inbound tourist arrival to Singapore



- Can be purchased on Singtel's website or through travel booking platforms

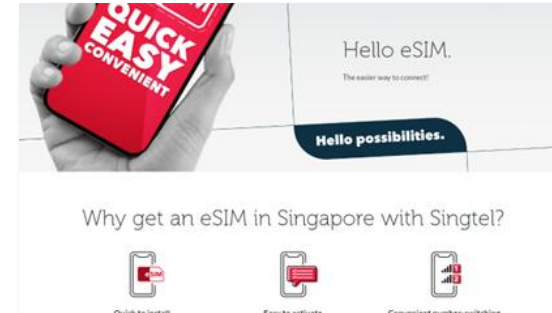


Youth

Meeting new demands for multiple SIM holding among youths



- **All-digital product**
- 4G/5G no-contract plans
- eSIM available on all plans
- In-app activation

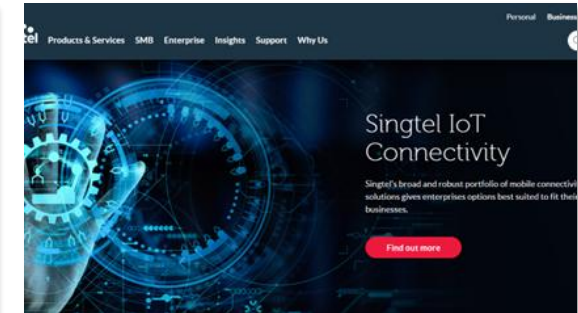


Early adopters

Attract tech enthusiasts and early adopters seeking the latest technology



- eSIM available on all plans
- In-app activation



Early adopters

Internet of Things (IoT)
eSIM only mobile plans, handsets

Source: Singtel

Focus on developing new businesses



By simplifying eSIM deployment & operations



Improve operation efficiency



Faster time-to-market to launch new services



Maximize the success of eSIM Activation



Simplifying eSIM operations for seamless user experience & quick deployment

Adapt your eSIM Profiles in real time



Tier 1 MNO in Europe

Match eSIM device capabilities



✓ Reduced Activation Issues

✓ Future-Proof new technologies



Tier 1 MNO in Asia

Update subscriber identification parameters



✓ More flexibility in operations

✓ Seamless Network Registration



Tier 1 MNO in Asia

Personalize Branding



✓ Faster time to market

✓ Less operational complexity

Address the rapidly growing IoT Market



By simplifying eSIM Connectivity in IoT



Answer security & flexibility challenges with move from SIM to eSIM



Overcome limitations of M2M RSP to manage growing diversity of connected objects



Benefit from massive deployment of connected objects across many vertical markets

cubic telecom : Simplifying eSIM Connectivity Management in IoT



Trusted for Top Global brands

- Automotive
- Transportation
- Agriculture



Today, M2M eSIM Provisioning solution

- Delivering connectivity services to **+5 million new devices** annually



Evolution of industry & customers solutions

- Variety of options to manage
- Need to ensure **simple & seamless management** for OEMs across **multiple eSIM architecture**
- New standard introduction **SGP.32**

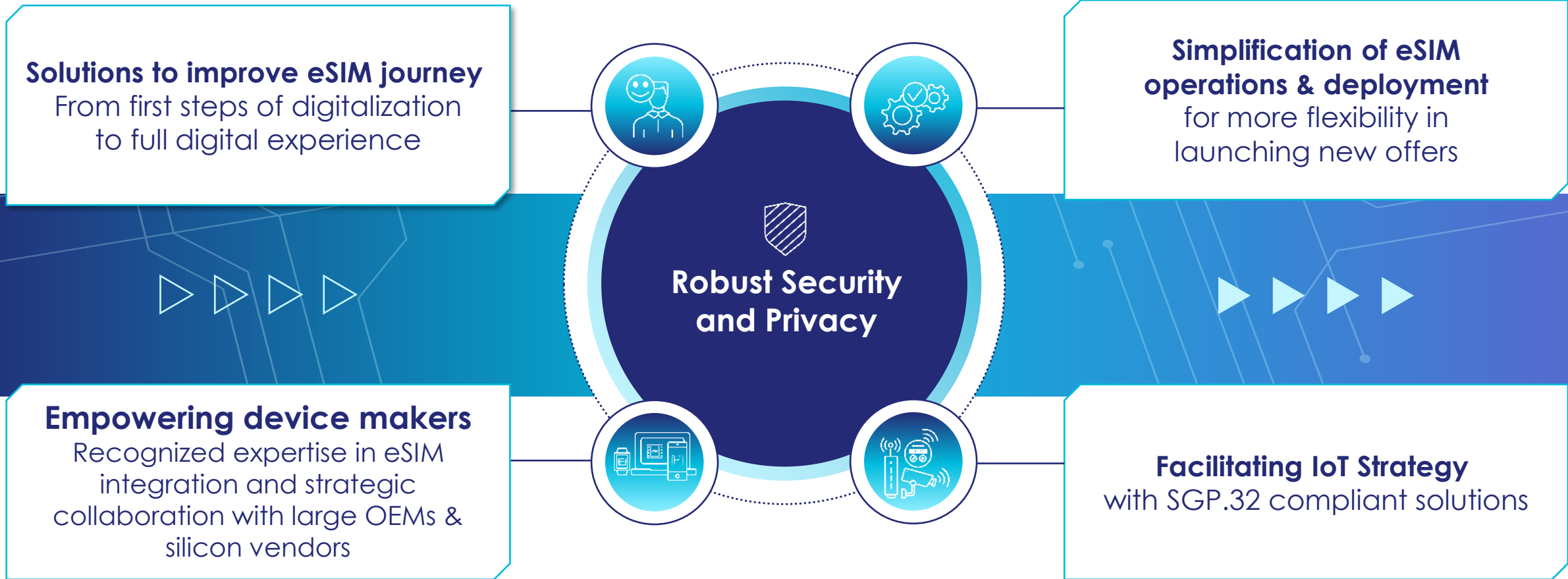


Move to SGP.32

- Start with Automotive & future extension to other segments
- GSMA-compliant IoT RSP
- Highly interoperable

Source: Cubic Telecom

THALES Your trusted partner for successful eSIM deployments



Thales, your trusted partner for successful eSIM deployments



+400

eSIM RSP Platforms
worldwide



+200M

eSIM Activations
since launch



>99,999%

Scalable & Resilient
platforms



THALES

Secure Solutions for a Connected World

THANK YOU

