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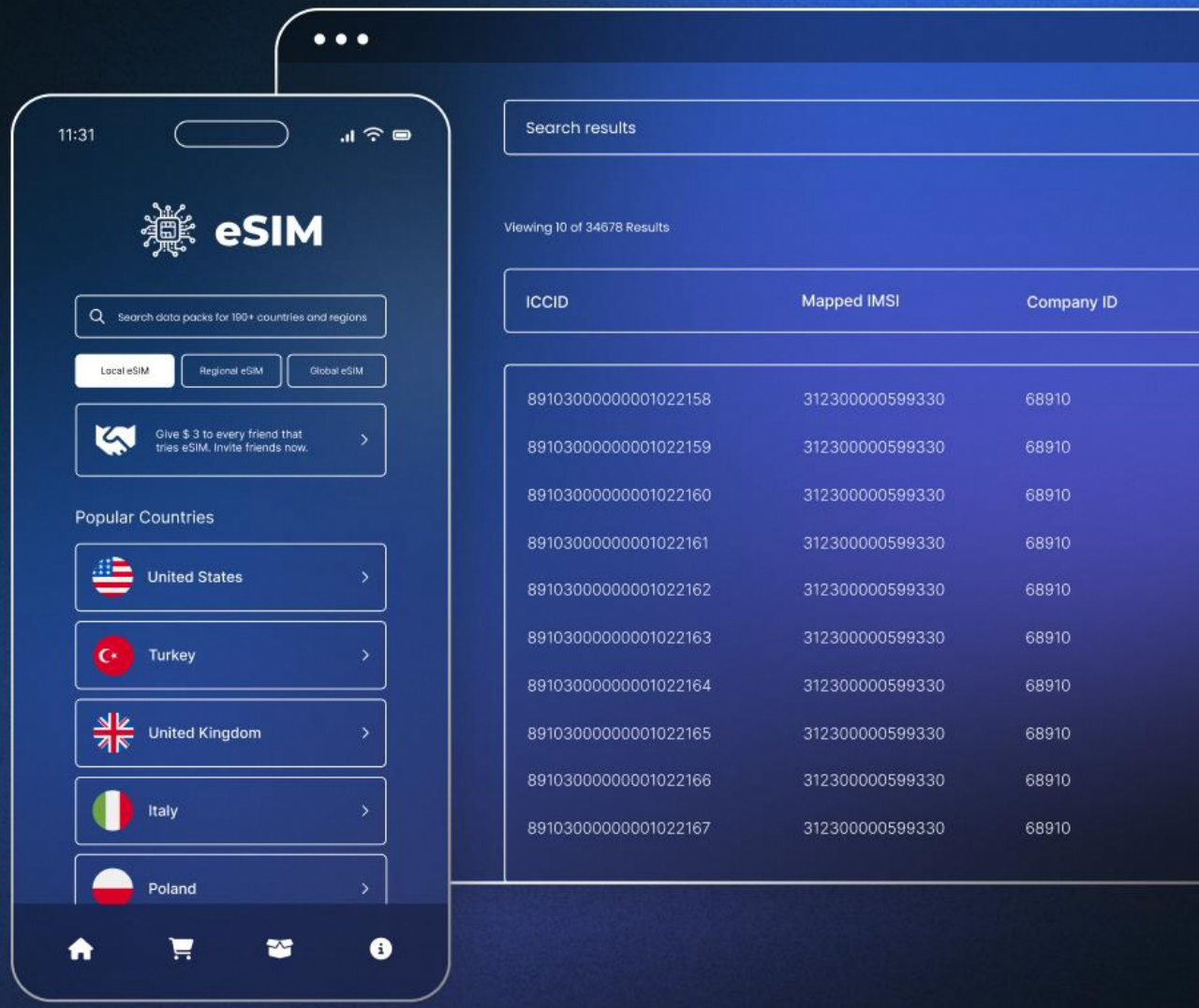
When Roaming Goes Digital

WHY ESIM IS REWRITING THE RULES

Gregory Gundelfinger
Founder & CEO, Telna

MWC Barcelona 2026 | eSIM Summit



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Travel Is Back at Scale

International Travel Is Growing Again

Roaming Lagged Behind the Traveler

~40%

OF TRAVELERS AVOID ROAMING ENTIRELY

45%

COST AND HIGH ROAMING CHARGES REMAIN THE MAIN BARRIER

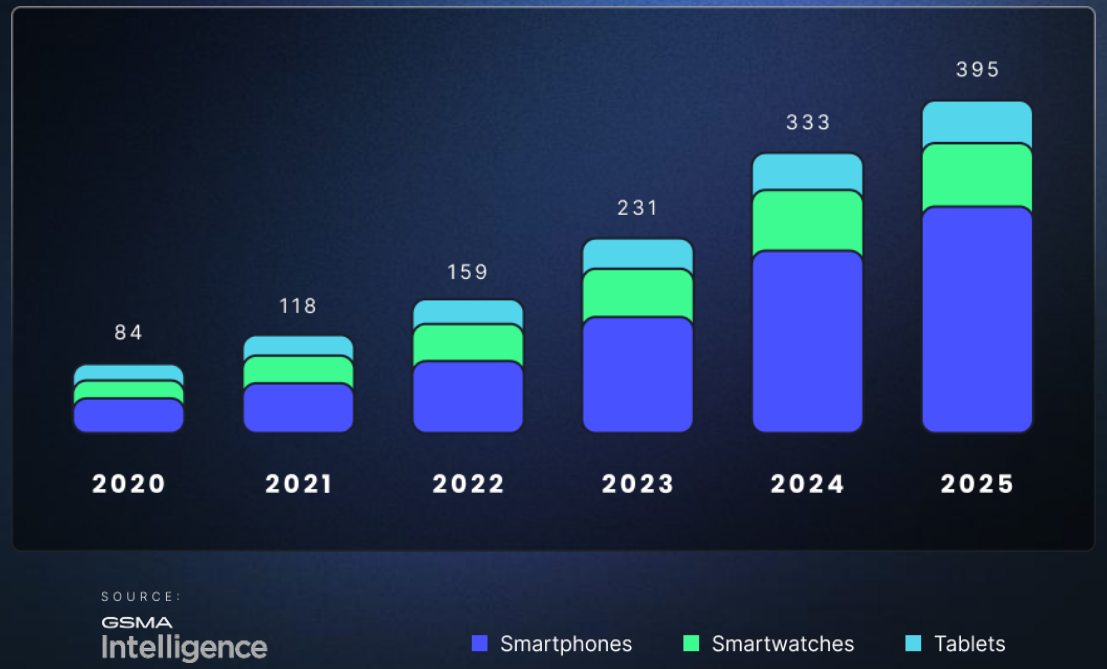
39%

CONNECTIVITY ALTERNATIVES ARE PLANNED BEFORE DEPARTURE

**Source: Kaleido Intelligence: Travel Connectivity Surveys 2025*

eSIM Is Now Mainstream

eSIM Is Now Standard in the Device Ecosystem



Source: GSMA Intelligence

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$16.5B+

GLOBAL ROAMING
REVENUES BY 2030

Travel eSIM Data Traffic

YOY% GROWTH FASTER
THAN ROAMING

2.8B

SMARTPHONES WITH
ESIM ACTIVATED
BY 2030

This Is a Structural Shift

Travel eSIM Is Scaling, Not Peaking

**Source: Kaleido Intelligence: Mobile Roaming Data Hub 2025*

The Value Chain Has Moved

Connectivity Now Starts Digitally

Activate

APPS AND DIGITAL PLATFORMS

Distribute

NO SIMS SWAPS

NO RETAIL POINTS

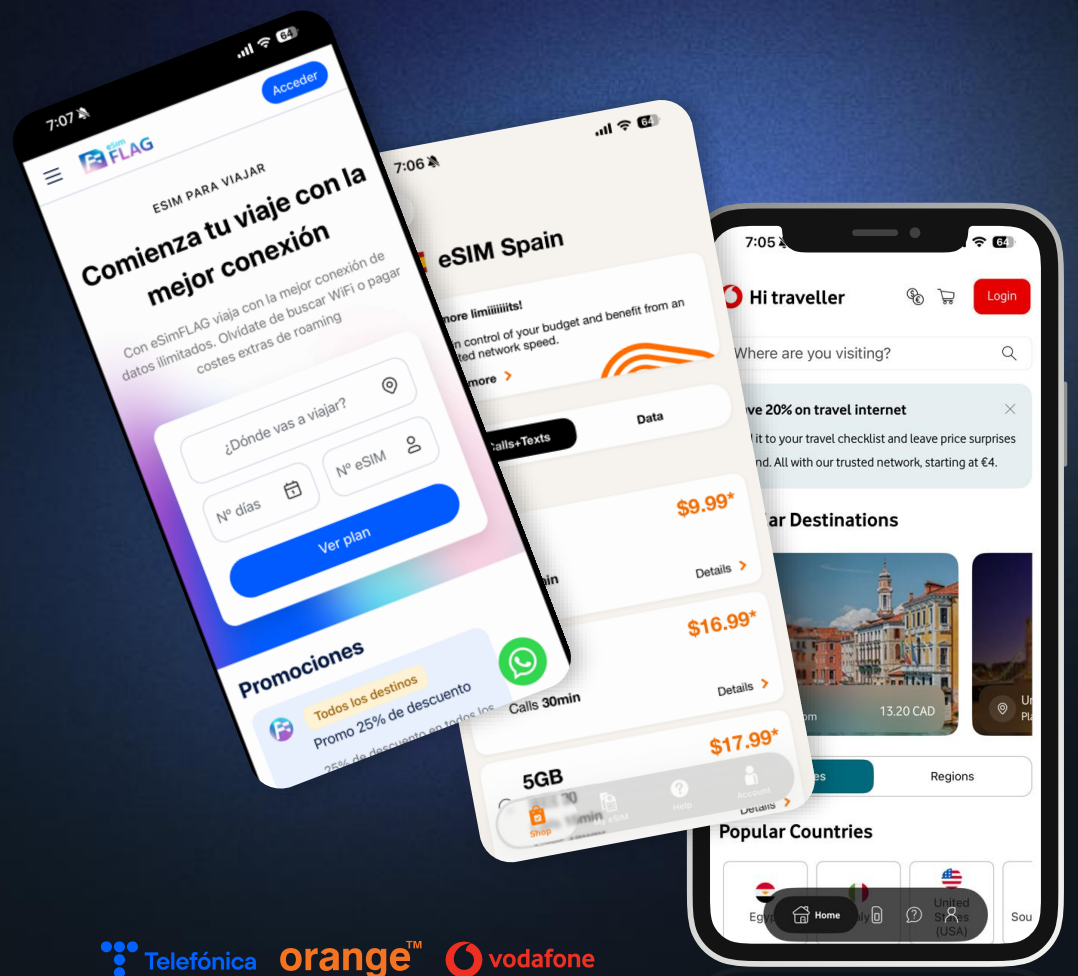
Engage

CLOSER TO THE TRAVELER

Unlocking Silent Roamers

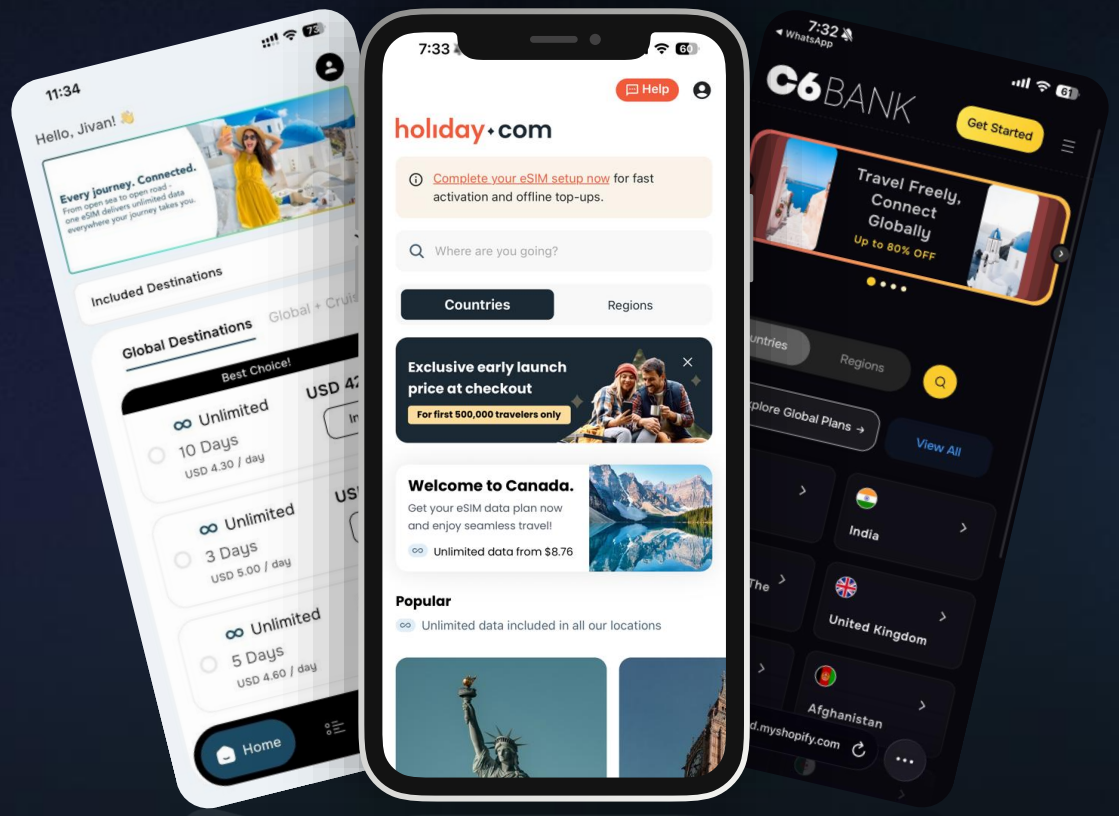
70% of Travelers Want To Stay With Their Operator

Leading MNOs are responding with eSIM apps and digital offers



Telefónica orange™ vodafone

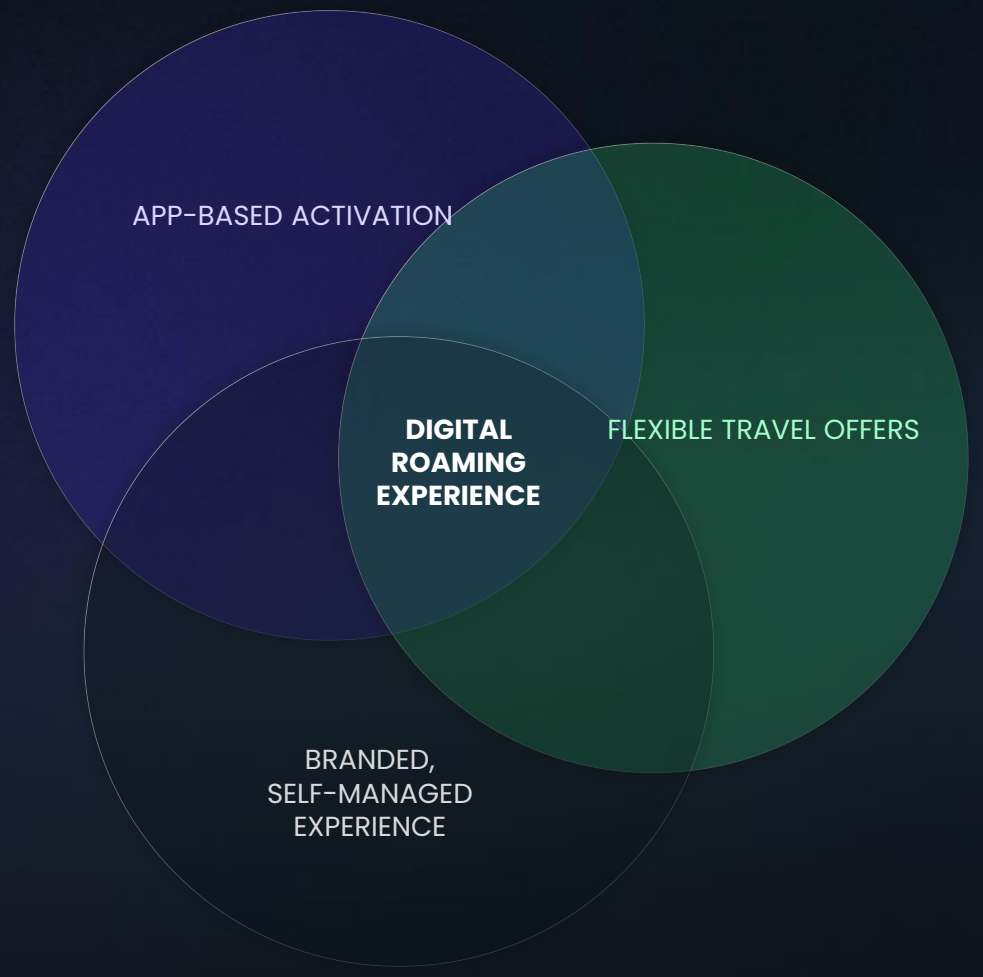
Source: Kaleido Intelligence: Travel Connectivity Surveys 2025



OneRoam holiday+com C6BANK

Digital-First Roaming

MVNOs go digital, Fintech apps bundle connectivity, Digital brands embed eSIM



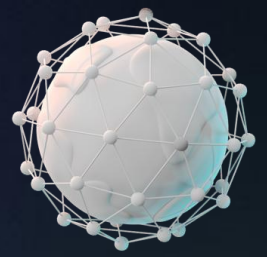
A Product, Not Just Pricing

Travel eSIM Is Scaling, Not Peaking

What Winning MNOs Are Doing

Three Clear Strategic Moves

DIGITAL-FIRST PARTNERSHIP ECOSYSTEM
Supper Apps, APIs & embedded distribution

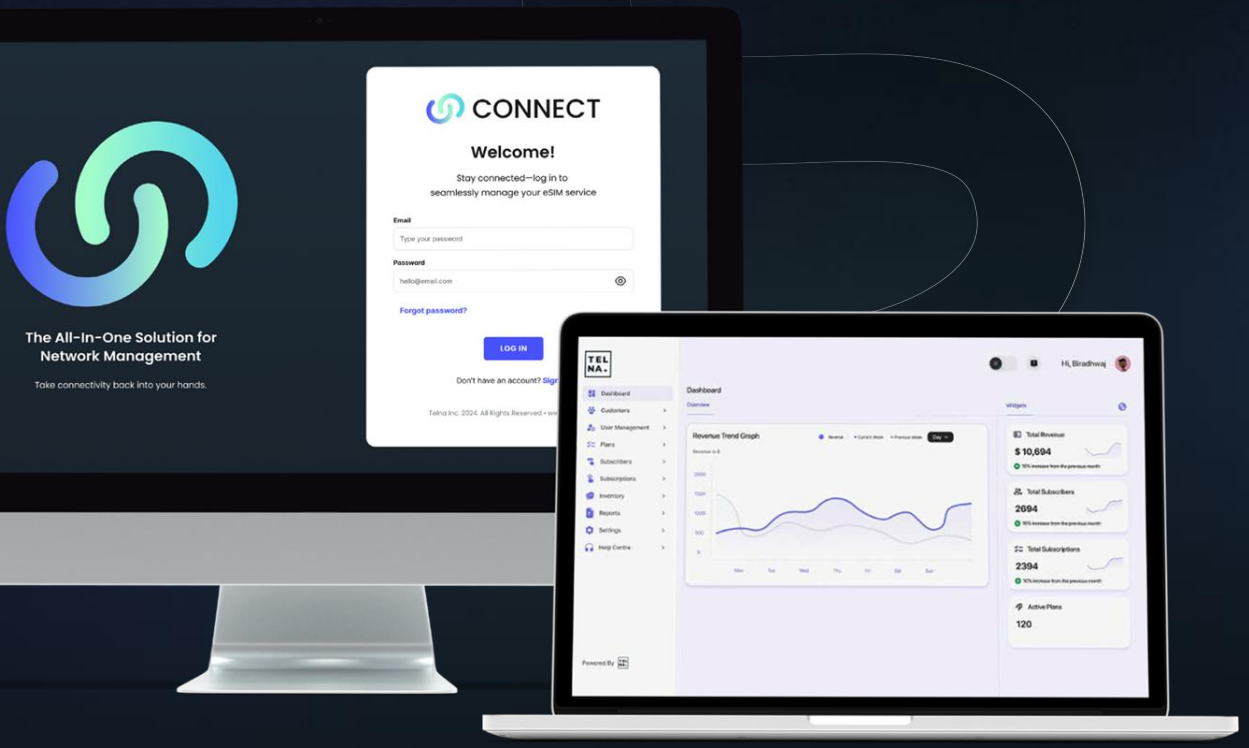


PLATFORM-LED GLOBAL COVERAGE
Programmable global scale

BRANDED TRAVEL ESIM OFFERS
Own the customer relationship

The Future Of Roaming Is Digital

Execution speed is the differentiator



Telna eSIM Venture

Investing In Digital Roaming Growth

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THANK YOU

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