eSIM Summit at MWC22

eSIM Adoption and Global Market Trends

Theatre 3 - Hall 7
Wednesday 2 March 2022
10.30-12.30 (GMT+1)
eSIM in 2022 and beyond: assessing new developments, market trends and consumer behaviour

Part 1 – eSIM involving in Massive IoT

Can eSIM be the Linchpin of Massive IoT?

eSIM in Action: How to accelerate and keep Massive IoT SAFE
eSIM Summit at MWC22

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

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KEYNOTE SPEAKER
Pablo Iacopino,
Director of Ecosystem Research, GSMA
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eSIM in 2022 and beyond
Assessing new developments, market trends and consumer behaviour

Pablo Iacopino
Head of Research and Commercial Content

2 March 2022
**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

Source: GSMA Intelligence
eSIM service is now global

eSIM reaches more than 3 billion mobile subscribers

Commercial availability of eSIM service for smartphones

Number of countries

- 24 countries in Dec. 2018
- 82 countries in Dec. 2021

Geographical reach

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

Source: Minimum number of countries, based on the lists provided by Apple, Huawei and Samsung (publicly available information) and GSMA Intelligence research of the top 30 markets
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec. 2018</td>
<td>45</td>
</tr>
<tr>
<td>Dec. 2019</td>
<td>103</td>
</tr>
<tr>
<td>Dec. 2020</td>
<td>175</td>
</tr>
<tr>
<td>Dec. 2021</td>
<td>232</td>
</tr>
</tbody>
</table>

• 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

Source: Minimum number of mobile service providers, based on the lists provided by Apple, Huawei and Samsung (publicly available information) and GSMA Intelligence research of the top 30 markets.
Source: GSMA Intelligence Operators in Focus Research – Operator Survey (100 operators worldwide), Future of Retail (2021)
## Potential benefits of eSIM

### Operator views

<table>
<thead>
<tr>
<th>Benefit</th>
<th>2021 survey</th>
<th>Compared to 2020 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Streamline logistics costs by reducing physical SIM purchasing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Explore opportunities in new digital services (e.g. digital identity, access authorisation, mobile ticketing and payment)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase adoption of other mobile devices by linking them to a consumer’s main subscription plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilitate international roaming services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Be able to capture new opportunities in the growing IoT market (consumer and enterprise)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Be able to capture new opportunities among Digital Native consumers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drive greater use of digital distribution channels</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enhance customer experience by digitising SIM-related operations</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: GSMA Intelligence Operators in Focus Research – Operator Survey (100 operators worldwide), Future of Retail (2021)
The addressable market for eSIM and iSIM is significant. eSIM and iSIM are targeting a share of the cellular market. However, eSIM adoption is still low relative to its long-term potential.

**Automotive**
- eSIM is already mainstream in connected vehicles.

**Beyond Automotive**
- Single initiatives rather than sector-wide deployments.

**Global IoT connections – billion**

- **Today:**
  - **2020:** 1.9
  - **2021:** 13

- **Future:**
  - **2025:** ~3x growth
  - **2030:** 5.3

Source: GSMA Intelligence
eSIM for IoT: there is untapped demand
Enterprises are accelerating their digital transformation

IoT deployments drive digitisation
Enterprises speak; % of respondents
IoT deployments are:

- 63% Part of a wider digital transformation agenda
- 37% Standalone initiative

Importance of eSIM in future IoT deployments
Enterprises speak; % of respondents

- 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

<table>
<thead>
<tr>
<th>Importance</th>
<th>eSIM for IoT is eSIM for digitisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very important</td>
<td>40%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>44%</td>
</tr>
<tr>
<td>Not at all important</td>
<td>10%</td>
</tr>
<tr>
<td>I don't know</td>
<td>4%</td>
</tr>
<tr>
<td>I am not familiar with eSIM</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: GSMA Intelligence Enterprises in Focus Research – Enterprise Survey 2020 (~2900 enterprises across most vertical sectors)
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

- Japan: 33% (2021), 22% (2020)
- Italy: 30% (2021), 26% (2020)
- Germany: 28% (2021), 22% (2020)
- Brazil: 27% (2021), 25% (2020)
- USA: 27% (2021), 17% (2020)
- South Korea: 26% (2021), 26% (2020)
- France: 20% (2021), 14% (2020)
- UK: 14% (2021), 13% (2020)

- 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

Source: GSMA Intelligence Consumers in Focus Research – Consumer Survey (2020 and 2021)
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)

- I read an article about eSIM: 28%
- A friend/family member/colleague told me about eSIM: 16%
- I was told about eSIM when I bought a new device (e.g. phone, smartwatch, tablet) directly from the manufacturer: 15%
- I saw an advert for eSIM (e.g. on TV, in-store, online, at an airport): 10%
- I received some information/promotional materials about eSIM from my mobile phone operator: 8%
- I heard about eSIM in another way: 8%
- Don't know / can't remember: 8%
- I heard about eSIM through my work: 7%

Source: GSMA Intelligence Consumers in Focus Research – Consumer Survey (2021)

• 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

<table>
<thead>
<tr>
<th>Country</th>
<th>Very interested</th>
<th>Fairly interested</th>
<th>Not very interested</th>
<th>% interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>28%</td>
<td>34%</td>
<td></td>
<td>62%</td>
</tr>
<tr>
<td>South Korea</td>
<td>15%</td>
<td>43%</td>
<td></td>
<td>58%</td>
</tr>
<tr>
<td>Italy</td>
<td>21%</td>
<td>36%</td>
<td></td>
<td>57%</td>
</tr>
<tr>
<td>USA</td>
<td>23%</td>
<td>32%</td>
<td></td>
<td>55%</td>
</tr>
<tr>
<td>UK</td>
<td>16%</td>
<td>38%</td>
<td></td>
<td>54%</td>
</tr>
<tr>
<td>France</td>
<td>14%</td>
<td>29%</td>
<td></td>
<td>43%</td>
</tr>
<tr>
<td>Germany</td>
<td>13%</td>
<td>26%</td>
<td></td>
<td>39%</td>
</tr>
<tr>
<td>Japan</td>
<td>7%</td>
<td>22%</td>
<td></td>
<td>29%</td>
</tr>
</tbody>
</table>

Source: GSMA Intelligence Consumers in Focus Research – Consumer Survey (2021)
Why are some consumers not using/interested in eSIM?
Various reasons – it means multiple challenges

<table>
<thead>
<tr>
<th>Reason for not using eSIM or not being interested in eSIM</th>
<th>Percentage of surveyed consumers who are not using eSIM or are not interested in using eSIM (aggregate, 8 countries)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'm just not interested in using eSIM</td>
<td>17%</td>
</tr>
<tr>
<td>I don't see the benefits of eSIM</td>
<td>15%</td>
</tr>
<tr>
<td>I don't understand how eSIM works</td>
<td>12%</td>
</tr>
<tr>
<td>I have privacy concerns about using eSIM</td>
<td>9%</td>
</tr>
<tr>
<td>The activation cost of eSIM is too high</td>
<td>7%</td>
</tr>
<tr>
<td>The cost of buying an eSIM compatible phone is too high</td>
<td>6%</td>
</tr>
<tr>
<td>Don't know</td>
<td>5%</td>
</tr>
<tr>
<td>Other reason</td>
<td>2%</td>
</tr>
<tr>
<td>My mobile phone operator provides an eSIM service, but it's not available on my plan</td>
<td>2%</td>
</tr>
<tr>
<td>My mobile phone operator doesn't provide an eSIM service</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: GSMA Intelligence Consumers in Focus Research – Consumer Survey (2021)

- 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)

- For main phone number
  - Multiple phone numbers stored on eSIM: France leads
  - Multiple phone numbers stored on eSIM: 20%
  - Don’t know: 5%
  - Only use eSIM when travelling abroad: 4%

- For secondary phone number: 21%

Source: GSMA Intelligence Consumers in Focus Research – Consumer Survey (2021)
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

Source: GSMA Intelligence eSIM scenario analysis
Future outlook: what could accelerate eSIM adoption?
### 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
THANK YOU!

Pablo Iacopino
Head of Research and Commercial Content
piacopino@gsma.com
eSIM Summit at MWC22

Can eSIM be the Linchpin of Massive IoT?

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KEYNOTE SPEAKER
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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

- **eSIM Adoption**: $0.9B revenue generated in 2024
- **Massive IoT**: 2.7B connections by 2025
- **LPWA Connections**:
  - Smart Metering
  - Fleet Management
  - Healthcare

- **Broadband & Critical IoT (4G/5G)**
- **Massive IoT (Licensed LPWA – NBloT & CAT-M)**
- **Legacy (2G/3G)**
- **Unlicensed LPWA and Satellite**
- **Short-Range IoT (WiFi, BT, Z-Wave)**

Sources: GSMA (IoT Revenue: State of the Market 2020)
Industry and Customer Drivers to eSIM

**Network Sunsets**
- Connected vehicles
- Autonomous vehicles
- Connected asset tracking

**Permanent Roaming**
- Connected medical equipment
- Police bodycams
- Remote patient monitoring

**Supply Chain**
- Environmental monitors
- Infrastructure monitors
- Connected water meters
Mitigating Roadblocks in Massive IoT with eSIM

- Future-Proof
- Regulatory Compliance
- Zero-Touch Provisioning
- Secure
- Coverage & Resilience
- Minimal TCO
Finding the True eSIM

What Characteristics Sets Apart the Real eSIM?

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

Global eSIM Connectivity
OPEN IoT SAFE
Blockchain
eSIM in Action: How to accelerate and keep Massive IoT SAFE?

KORE and Kigen address adoption and acceleration of eSIM and how to make most of standards-based security schemes such as IoT SAFE.
eSIM Summit at MWC22

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Part 2 - eSIM Revolution
Part 2 – eSIM revolution

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

Unleash the power of the eSIM
eSIM Summit at MWC22

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

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eSIM Summit at MWC22

Unleash the power of eSIM

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THE INCONVENIENT TRUTH

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.
AND WE ARE HOLDING CUSTOMERS BACK...

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

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

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

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
WHERE DO YOU SIT?

THE MAGPIE

THE BULL

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");
console.log("Hello New Connected World");

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

Cellular Plan Ready to Be Installed
Tap this notification to finish your Cellular plan setup.
eSIM IS MAKING THINGS EASIER
And we are at the forefront of this acceleration

0 TO 18M eSIM ACTIVATIONS IN 3 YEARS
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
Visit us at Stand 5A32, Hall 5
eSIM Summit at MWC22

Unleash the power of eSIM

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KEYNOTE SPEAKER
Antoine Thomas,
eSIM solutions Director,
Thales DIS

KEYNOTE SPEAKER
François Bogusz,
Digital Telco Director
Thales DIS
Unleash the power of eSIM

eSIM summit at MWC 22
Multiple devices types need connectivity

CONSUMER ELECTRONICS

Secure

Consumer IoT

Miniaturized

Industrial IoT

Robust

M2M

Digital
The IoT market needs

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

Design constraints

- Miniaturization
- Low power consumption
- Out-of-the-box cellular connectivity
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
IoT dilemma: How to boost cellular connectivity for IoT devices?

**GSMA M2M**
- Offers fleet management
- Deployment can be seen as complex

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

**GSMA Consumer**
- Simple deployment
- Needs an End-user consent
- No fleet management
Bootstrap connectivity for eSIM localization available in 186 countries with 383 roaming partners

- No connectivity
- Bootstrap
- Final Subscription

**Turn Device On**
End-user turns on device

**Instant Connect**
Automatically injects a temporary bootstrap

**eSIM Localization**
End-user downloads the final subscription

- Ease manufacturing - no bootstrap injection
- Reduce connectivity costs - Less bootstrap IMSIs needed
- Keep logistics simple - single SKU
- Ease supply chain - Bind device and subscription later

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

**Thales Instant Connect**

- **Turn Device On**: End-user turns on device
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<th>Bootstrap</th>
<th>Final Subscription</th>
</tr>
</thead>
</table>

MWC eSIM summit - March 2022
“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

Uberization

Disruption

New Segments

Resilience

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 & triPica assembled best of breed technologies to create:

**Trusted Digital Telco, « A telco-in-an-App experience »**

A 100% Digital and Simple Customer Experience

- 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
Thank you
eSIM Summit at MWC22

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THANK YOU