

# The Global IoT Picture: Strategies, eSIM Adoption, and Satellite Capability

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# State of Global IoT Connectivity

**2024: 1.3B**

global IoT connections

## Key Drivers

- Supply chain visibility
- Healthcare & clinical trial deployments
- Auto OEMs expanding to new markets
- Metering infrastructure
- Smart agriculture

## Demand and technology shifts

Roaming models

Country compliance

The rise of satellite

SGP.32 eSIM

Manufacturing shift

5G & RedCap

**2030: 3.6B**

projected IoT global connections

**60%**

Market share will come from Connected Cars, Smart Meters, and Smart Retailers by 2030

**2030: 22.7M**

Predicted satellite IoT connections

Cellular IoT is rapidly growing, driven by 5G, eSIM, and Satellite, unlocking new opportunities for global connectivity

# Global IoT: The "AND" Strategy

## Global IoT Roaming

Ideal for customers needing global connectivity without eSIM.

## Global IoT Bootstrap

Uses a primary MNO to simplify the OOB experience for IoT device connectivity.

## Global IoT Localization

Leverages Verizon's worldwide carrier partnerships to obtain a localized carrier profile, yet have a single carrier relationship.

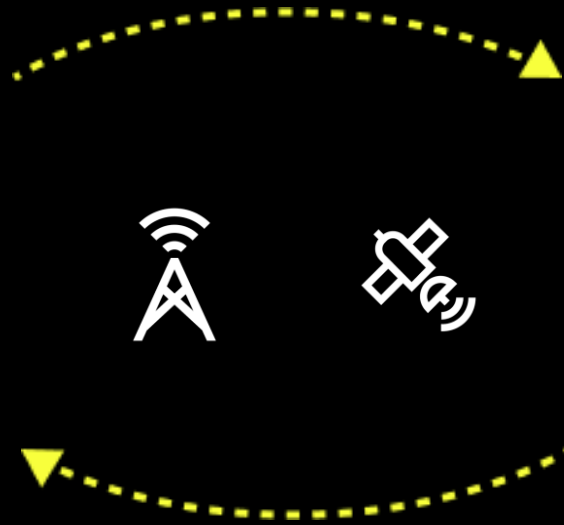
## Holistic global strategy



# How is Verizon approaching Global?



**Seamlessly connecting  
U.S. customers to the world**



**Bringing global  
enterprises to the U.S.**

# eSIM & Private Networks: Powering Global Connectivity

## ▶ Key Benefits

✓ Tailored connectivity

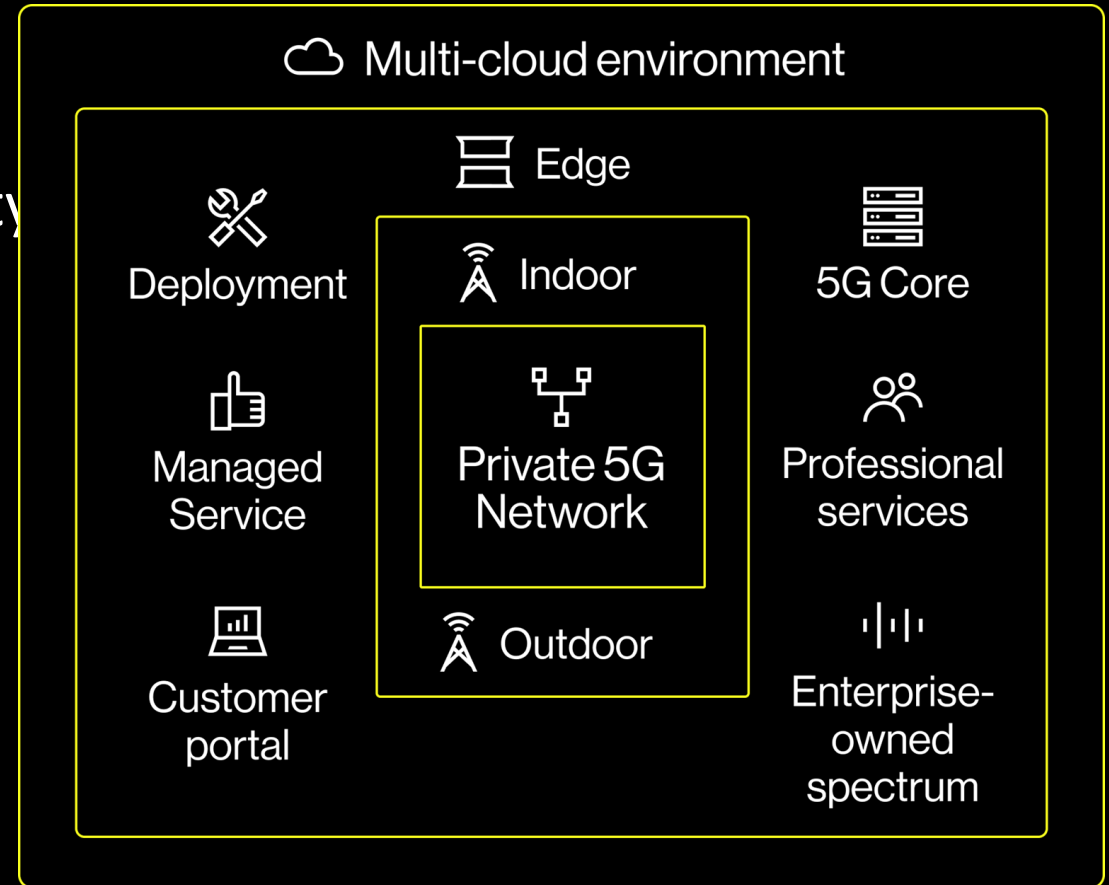
✓ Enhanced security

↔ Control and flexibility

💰 Cost

↑ Scalability

⌚ Efficiency



# Satellite IoT: Unlocking New Possibilities

## Key Insights

### Satellite IoT Market Growth

Expected = 22.7M connections at 12% CAGR by 2030.

### 3GPP Release 17

Integrates non-terrestrial networks into cellular systems for remote connectivity.

### Global Coverage

Expands connectivity in remote and underserved areas.



I'll leave you  
with these  
thoughts

Roaming becoming antiquated—  
**how will you future proof ?**

Compliance and security are  
a moving goalpost— **how will you keep  
up?**

Satellite connectivity is now essential—  
**how will you integrate it into your  
strategy?**

Your deployments are long-term  
commitments—**is your provider in it for  
the long haul?**

**verizon**  
**business**