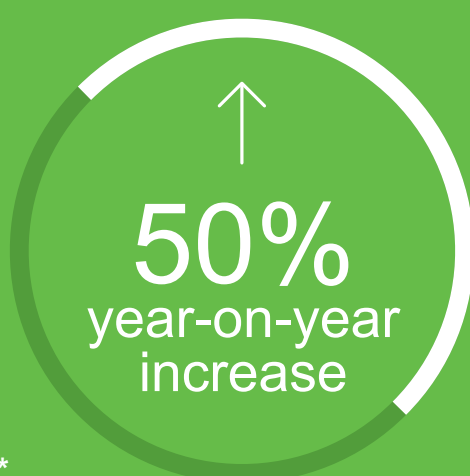


Trusted Connectivity Alliance 2019 in Review: Industry Insights

Trusted Connectivity Alliance members report:

169 million
eSIM shipments for 2019 ▶



Trusted Connectivity Alliance estimates that the total available SIM market globally in 2019 comprised **5.05 billion units**.*

*Includes removable SIM and soldered SIM for M2M form factors. Excludes eSIM.

eSIM: Broadening the reach and applicability of SIM technology

Strong increase in eSIM shipments provides foundation for robust future growth.

New eSIM-enabled handsets continue to be launched.

M2M continues to support eSIM growth, with connected cars emerging as the key use-case.

Dual SIM devices are gaining traction and reflect a long-term trend for smartphones, offering users the choice of eSIM and traditional SIM.

Increasing consumer uptake where eSIM is available suggests sustained demand as enabled devices grow.

eSIM: An advancing infrastructure

▶ Trusted Connectivity Alliance members report 270 eSIM Subscription Manager (SM) platforms deployed globally at the end of 2019, demonstrating significant investment in eSIM infrastructure.

▶ eSIM SM platforms enable remote provisioning and lifecycle management of eSIM products.

▶ Increasing number of IoT and M2M devices connected by eSIM technology is a strong industry growth driver, leading to demand for:

eSIM personalisation

Lifecycle management

Security services

Advances in eSIM technology: Interoperability through standardisation

Trusted Connectivity Alliance members work collaboratively to facilitate and accelerate the delivery of trusted mobile connectivity worldwide.

Recent key eSIM technology advancements:

▶ Specifications developed by Trusted Connectivity Alliance are widely deployed to promote interoperable, secure and consistent remote eSIM provisioning.

▶ IoT SAFE enables ecosystem players to leverage the eSIM to execute security services and manage credentials across millions of devices.

About Trusted Connectivity Alliance

Trusted Connectivity Alliance is a global, non-profit industry association, which is working to enable a secure connected future. www.trustedconnectivityalliance.org.

Our Membership

Executive:	Full:	Ordinary:
Arm	Card Centric	Compron
Gemalto (a Thales company)	KONA I	
G+D Mobile Security	Linxens	
IDEMIA	Qualcomm	
NXP	Watchdata	
ST Microelectronics	Wuhan Tianyu	
Valid		

