

Trusted Connectivity Alliance: TRE¹ Industry Insights

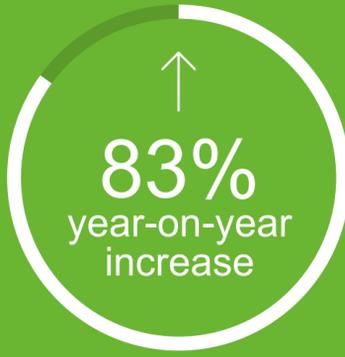


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A Tamper Resistant Element (TRE) is a standalone secure element or a secure enclave, consisting of hardware and low-level software providing resistance against logical and physical attacks, capable of hosting secure applications and their confidential and cryptographic data. TREs are available in removable, embedded and more recently, integrated form factors (e.g. SIM, eSIM and Integrated SIM).

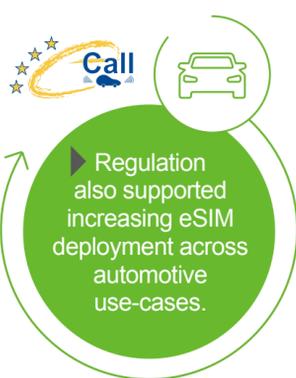
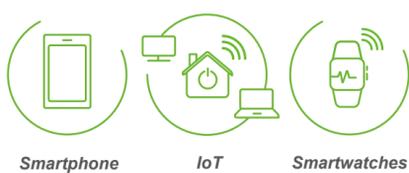
Trusted Connectivity Alliance members report:

309 million
eSIM shipments
for 2020



eSIM set for significant and sustained growth

Increases in eSIM shipments were driven by the launch of new eSIM-enabled:



Number of eSIM-enabled consumer, IoT and M2M devices poised for long-term growth.



Consumer and industry uptake of eSIM functionality is growing.



eSIM profile transactions refer to the number of times a mobile network operator profile was downloaded to a device.

The supporting eSIM infrastructure continues to advance:



eSIM Subscription Manager (SM) platforms enable the remote provisioning and lifecycle management of eSIMs.

New business growth opportunities are emerging for industry stakeholders through:



Strong demand for traditional SIM form factors

TCA estimates that the total available SIM² market globally in 2020 comprised

4.8 billion units.



Market demonstrated resiliency and stability despite the impact of Covid-19 and resulting decline in smartphone sales.



²Includes removable SIM and soldered SIM for M2M form factors. Excludes eSIM.

Momentum builds for 5G SIM

2020 marked the first year of widespread 5G SIM deployments.



The 5G SIM promotes the highest levels of security, privacy and functionality in 5G networks to support key use-cases:

- Connected vehicles
- Enhanced mobile broadband
- Massive IoT applications
- Critical communication infrastructures



A breakdown of data collected through TCA's member monitoring process is available via an annual subscription. For more information, please contact info@trustedconnectivityalliance.org

About Trusted Connectivity Alliance

Trusted Connectivity Alliance (TCA) is a global, non-profit industry association working to enable trust in a connected future. The organisation's vision is to drive the sustained growth of a connected society through trusted connectivity which protects assets, end user privacy and networks.

TCA members are leaders within the global Tamper Resistant Element (TRE) ecosystem, and work collectively to define requirements and provide deliverables of a strategic, technical and marketing nature. This enables all stakeholders in our connected society to benefit from the most stringent secure connectivity solutions that leverage TCA members' expertise in tamper proof end-to-end-security.

TCA members:

