Trusted Connectivity Alliance: TRE Industry Insights

Trusted Connectivity Alliance members report:

- **eSIM set for significant and sustained growth**: eSIM set for significant and sustained growth
- **Market demonstrated resiliency and stability**: Despite the impact of Covid-19 and resulting decline in smartphone sales, the market demonstrated resiliency and stability.
- **Strong demand for traditional SIM form factors**: TCA members: Strong demand for traditional SIM form factors.
- **Momentum builds for 5G SIM**: Momentum builds for 5G SIM.
- **Advances in eSIM Technology**: Advances in eSIM Technology.

**eSIM set for significant and sustained growth**

- **Number of eSIM-enabled consumer IoT and M2M devices rose sharply for long-term growth**: Number of eSIM-enabled consumer IoT and M2M devices rose sharply for long-term growth.
- **Consumer and industry uptake of eSIM functionality is growing**:
  - 300% increase in eSIM profile transactions in 2020.
  - 4% increase on year.

**Market demonstrated resiliency and stability**

- **4.8 billion units**: The supporting eSIM infrastructure continues to advance.
- **687 eSIM Subscription Manager (SM) platforms deployed globally by the end of 2020**: The supporting eSIM infrastructure continues to advance.
- **2020 marked the first year of widespread 5G SIM deployments**: TCA estimates that the total available SIM market globally in 2020 comprised 4.8 billion units.

**Strong demand for traditional SIM form factors**

- **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

**Momentum builds for 5G SIM**

- **2020 marked the first year of widespread 5G SIM deployments**: 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 are leaders within the global Tamper Resistant Element (TRE) ecosystem**: 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.

**Advances in eSIM Technology**

- **Interoperability through standardisation**: About Trusted Connectivity Alliance
- **Enabling a secure, connected future**: 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.

**About Trusted Connectivity Alliance**

- **A breakdown of data collected through TCA’s member monitoring process is available via an annual subscription. For more information, please visit the website**: A breakdown of data collected through TCA’s member monitoring process is available via an annual subscription. For more information, please visit the website.

**TCA members**

- **EMVCo**: Certification programme for EMV-based financial payment systems
- **Giesecke+Devrient**: Global provider of technology solutions to ensure secure and reliable financial transactions
- **Kigen**: Security solutions for the Internet of Things
- **NXP**: Smart and secure solutions for connected and autonomous mobility, as well as connected homes, industries and infrastructure
- **QUALCOMM**: Mobile platforms for mobile and IoT markets
- **CATIC**: China Electronics Technology Innovation Center
- **THALES**: Critical technologies for global security
- **Comprion**: Security solutions for the Internet of Things
- **Kona**: Security solutions for the Internet of Things
- **Linens**: Security solutions for the Internet of Things
- **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**: 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.

**Regulation also supported increasing eSIM deployment across automotive use-cases.**

- **309 million eSIM shipments for 2020**: 309 million eSIM shipments for 2020.
- **Includes removable SIM and soldered SIM for M2M form factors. Excludes eSIM.**

- **38% year-on-year increase**: 38% year-on-year increase.

- **83% increase in eSIM profile transactions in 2020**.

- **687 eSIM Subscription Manager (SM) platforms deployed globally by the end of 2020**.

- **New business growth opportunities are emerging for industry stakeholders through eSIM personalisation, lifecycle management, security services and more**.

- **New business growth opportunities are emerging for industry stakeholders through eSIM personalisation, lifecycle management, security services and more**.

- **300% increase in eSIM profile transactions in 2020**.

- **1.54 million eSIM profile transactions in a single day**.

- **687 eSIM Subscription Manager (SM) platforms deployed globally by the end of 2020**.

- **1.54 million eSIM profile transactions in a single day**.

- **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**.

- **Regulation also supported increasing eSIM deployment across automotive use-cases.**

- **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.**

- **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.

- **Enabling a secure, connected future**: 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.

- **A breakdown of data collected through TCA’s member monitoring process is available via an annual subscription. For more information, please visit the website**: A breakdown of data collected through TCA’s member monitoring process is available via an annual subscription. For more information, please visit the website.

- **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.**

- **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.

- **Enabling a secure, connected future**: 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.

- **A breakdown of data collected through TCA’s member monitoring process is available via an annual subscription. For more information, please visit the website**: A breakdown of data collected through TCA’s member monitoring process is available via an annual subscription. For more information, please visit the website.