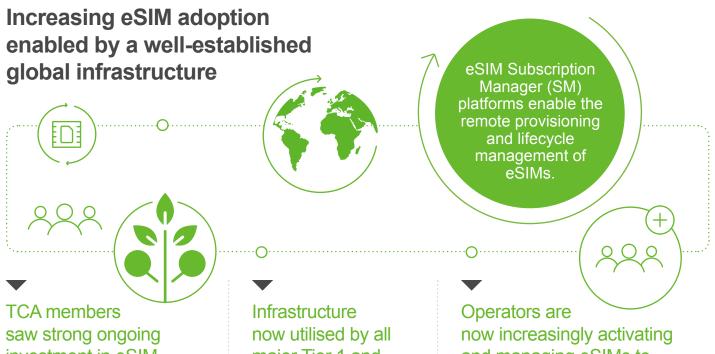


Enabling trust in a connected future

# Trusted Connectivity Alliance: Industry Insights 2021

## Global adoption of eSIM technology continued to build in 2021





investment in eSIM Subscription Manager (SM) platforms. major Tier 1 and Tier 2 operators.

and managing eSIMs to authenticate and onboard new customers.

## Automotive and IoT use-cases drive increases in eSIM shipment volumes

 Trusted Connectivity Alliance members report 337 million eSIM shipments for 2021. 9% year-on-year increase

 Increases in eSIM shipment volumes were mainly driven by use-cases across automotive and IoT verticals. TCA members reported **38% growth** in M2M eSIM shipments, demonstrating accelerating adoption of cellular connectivity across IoT use-cases

There was also sustained growth across the consumer eSIM segment, but volumes were tempered by:

→ The impact of economic sanctions and broader geopolitical trends on the global smartphone market.

→ The delay of new device launches and the reduction of shipped units due to the widely publicised worldwide chip shortage.

eSIM momentum is anticipated to continue

2022

growth

TCA forecasts that the total available market for eSIMs will see double-digit growth in 2022.

TCA is committed to working with key industry stakeholders to develop and advance enabling specifications that promote secure, scalable and interoperable eSIM deployments.

#### 5G SIM deployments gain significant momentum



This builds on advances made in 2020, which marked the first year of widespread 5G SIM deployments.



The 'Recommended 5G SIM' as defined by TCA promotes the highest levels of security, privacy and functionality in 5G networks to maximise operator investments and support 5G use-cases.

# Market for traditional SIM form factors remains significant

TCA estimates that the total available SIM<sup>1</sup> market globally in 2021 was **4.35 billion units.** 

But volumes have been affected by the ongoing chip shortage

des removable SIM and soldered SIM for M2M form factors. Excludes eSIM.

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

TRUSTED CONNECTIVIT ALLIANCE

#### 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.





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