

Trusted Connectivity Alliance: SIM Industry Insights

Global eSIM adoption surges in 2022

▶ TCA member data shows that consumer and M2M eSIM profile downloads collectively increased by

↑ 135% in 2022

▶ Increased adoption coincided with the growing deployment of eSIM-enabled devices.

eSIM profile downloads also known as eSIM profile transactions refer to the number of times a mobile operator profile was downloaded to a device.

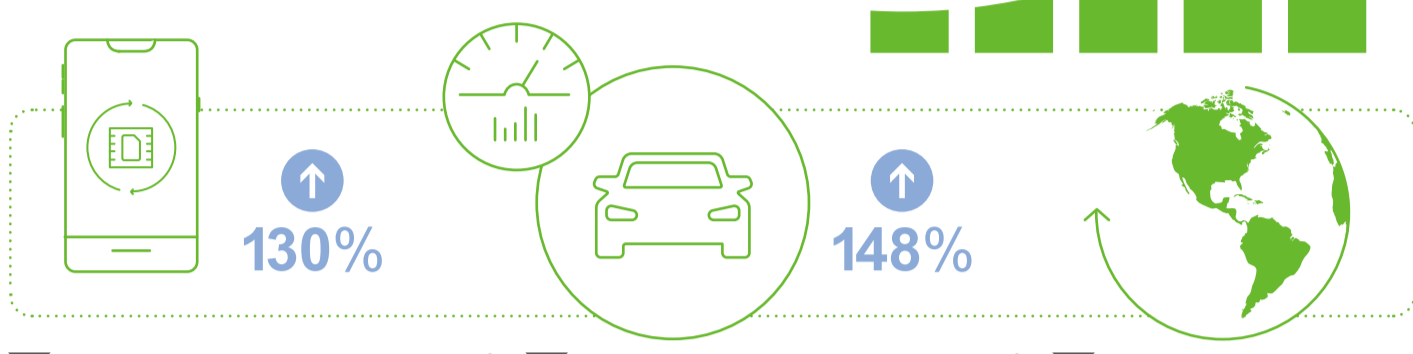
• eSIM shipments reported by TCA members increased by

↑ 13% year-on-year to reach **382 million units**

• TCA estimates the total available market was

427 million units

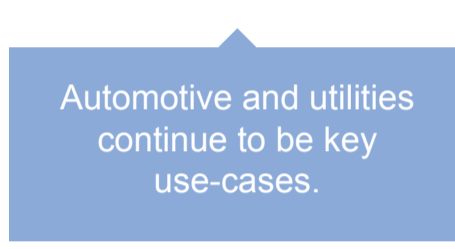
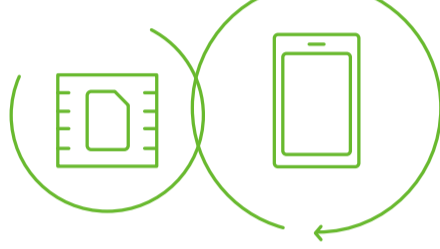
Consumer and industry uptake accelerates



Launch of major eSIM-only smartphone models saw consumer eSIM profile downloads increase by **130%**

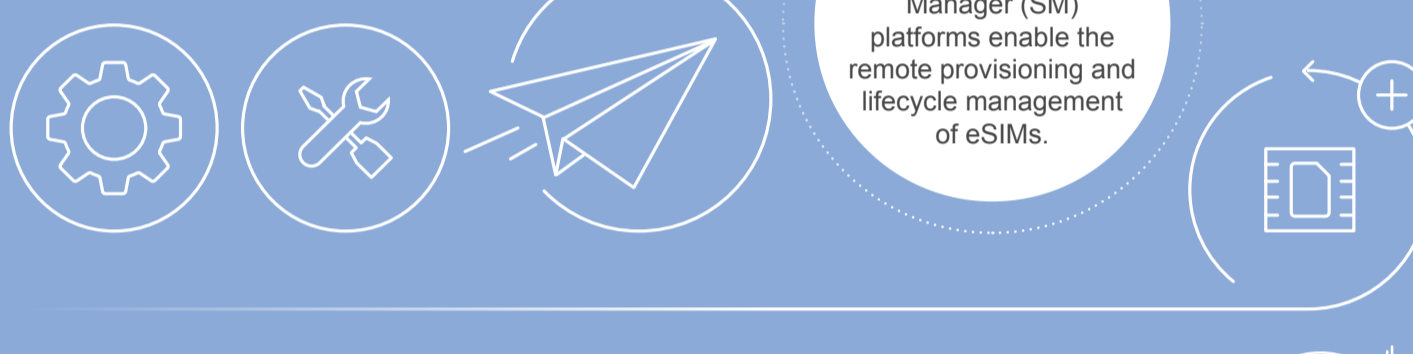
Industrial and M2M use-cases remain fundamental in promoting eSIM adoption, as M2M eSIM profile downloads grew by **148%**

Overall growth in eSIM profile downloads was driven by the U.S. market, followed by Western Europe.



Automotive and utilities continue to be key use-cases.

Growth in the enabling infrastructure continues



▶ Growth in consumer adoption was supported by strong ongoing investment in eSIM Subscription Manager (SM) platforms.

→ The number of deployed consumer eSIM SM platforms rose by 29% in 2022.

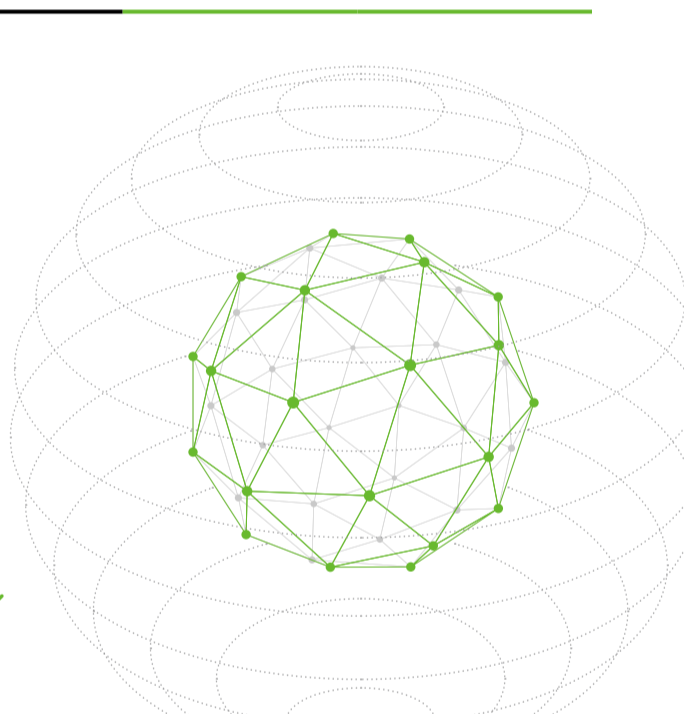
↑ 29% increase in 2022

→ Mobile operators are increasingly moving to deliver increased value through seamless onboarding and activation, fully digitalised experiences and increased personalisation.

eSIM interoperability emerges as a key industry priority

▶ As the eSIM market grows, so too does the commercial and reputational impact of market fragmentation and interoperability challenges.

▶ TCA is committed to working with stakeholders and partners from across the industry to directly shape the evolution of eSIM technology.



Strong momentum for the Recommended 5G SIM / eSIM continues

▶ The TCA Recommended 5G SIM / eSIM promotes the highest levels of security, privacy and functionality in 5G networks to maximise operator investments and support key 5G use-cases.

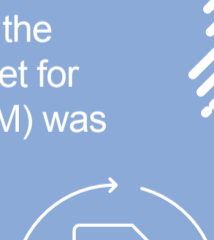
▶ TCA estimates that total deployments of the Recommended 5G SIM / eSIM in 5G networks grew by **77%** to **242 million units** in 2022 as the global rollout accelerated and operators increasingly deployed, or prepared to migrate to, 5G standalone networks (5G SA).

↑ 77% growth to **242 million units** in 2022

Market for traditional SIM form factors remains substantial

▶ TCA estimates that the total available market for SIM (excluding eSIM) was

4.1 billion units in 2022



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:

