

Thales eSIM Subscription Management



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Mobile Connectivity Solutions



Evolution of Mobile Subscription

The mobile communication industry is at a point of inflection. The rapid expansion in application of mobile communication into automotive and consumer electronic industries has led GSMA to introduce a specification for Remote SIM Provisioning of consumer electronic devices, the eSIM.

The need for embedding SIM cards into devices started with the emergence of M2M solutions that required more robustness, reliability and longer lifespan. Soldering a SIM into a device raised the question of managing the various subscriptions that this SIM would have to store. The Remote SIM Provisioning (RSP) concept started in 2010 when GSMA decided to tackle this challenge with a specification that defines what an eSIM (also known as embedded SIM or eUICC) is and how to remotely provision them with subscription profiles in an M2M context. eSIMs and RSP solutions for M2M have been widely adopted, especially by the automotive industry.

On the consumer market, device manufacturers started to embrace the value of eSIM as it would bring great value to new device categories like wearables and connected ultra-mobile laptops and tablets. Thereafter, GSMA announced consumer initiative in 2015. First consumer devices equipped with eSIMs were released shortly after but had a limited impact on the market due to the relatively share of wearables and connected PCs in the cellular space. In September 2018, Apple announced their new iPhone line-up will ship with built-in eSIMs open to any qualified MNO, except in China. Since then, other smartphone vendors have launched eSIM-compliant devices, such as Samsung, Motorola, Google....Apple's iOS, Android, Wear OS by Google and Windows 10 operating systems support eSIM.

This will bring eSIM to the masses and change the consumer market forever with more cellular connected devices and a smooth, fully digital end-user experience.

eSIM Subscription Management business drivers

eSIM subscription management plays an instrumental role in connecting objects, from industrial M2M applications like smart vehicles to consumer electronic devices like smartphones. For service providers and OEMs alike, there are three main business drivers to have a GSMA compliant subscription management solution.



1. NEW REVENUE STREAMS

The IoT subscription management market is anticipated to reach over €1.1 trillion by the year 2025¹. eSIM subscription management helps MNOs, OEMs and service providers to tap into the true potential of this market through end-to-end subscription lifecycle management.



2. COST REDUCTION

The complexity of IoT ecosystem brings supply chain complexities with it. eSIM subscription management helps in reducing the number of device configurations and dependency on multiple SKUs for multiple locations, leading to cost reduction for all stakeholders.



3. LONG TERM RELIABILITY

Increasingly, there will be a need to change subscription of devices in the field. This need could be triggered by emerging business requirements or by enforcement of new regulation. Augmenting the power of eSIM, eSIM subscription management enables connectivity providers to be agile and future-proof.

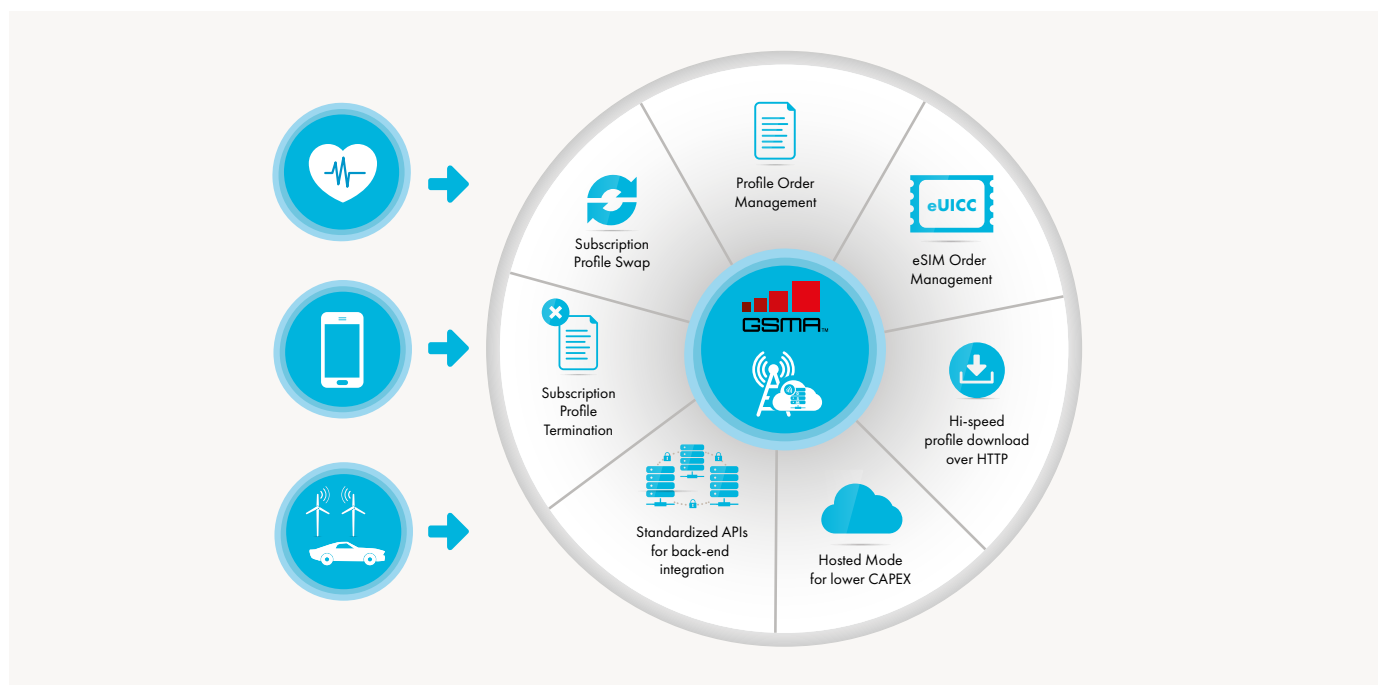
How Thales eSIM Subscription Management delivers value

Thales eSIM Subscription Management is the one-stop shop for MNOs, OEMs and Service Providers for their subscription management needs.

Leveraging our experience in SIM cards, over 800 solutions deployed, including OTA Platforms, Device Management and Roaming solutions, Thales has developed a first-in-class eSIM Subscription Management

solution that is based on standards, offers highest levels of security, and drastically reduces the complexities of supply chain.

Thales eSIM Subscription Management works with any GSMA compliant embedded SIM, which ensures seamless interoperability, enabling customers with multiple sourcing options. Whether in hosted or in-house modes, customers can rely on high speed profile management over HTTP, and end-to-end subscription lifecycle management for multiple industry verticals.



¹ Mobile Economy 2019 of GSMA

Thales, the world's leader in eSIM subscription management

- Thales ranked N° 1 provider for both hardware-based eSIM and eSIM management solutions (Counterpoint Research, 2019)
- IoT Breakthrough Award for Thales eSIM overall offer as Global IoT Innovation Vendor of the Year (2020)
- Future Digital Award for Thales Instant Connect as Smart City Innovation of the Year (Juniper Research, 2019)
- IoT Global Award for Connected Health or Wearable Technology, for Thales Instant Connect (2019)
- Thales eSIM mentioned in the Gartner Magic Quadrant on M2M services
- Thales ranked among the main players in Gartner Hype Cycles (for Connected vehicles and Smart mobility, and for the Future of CSP Wireless Networks Infrastructure)

Why Thales

- Close to 200 eSIM subscription management platform awarded by mobile operators, operator alliances, MVNOs, automotive makers and OEM across all continents
- Largest research and developments teams for SIM and eSIM-related technologies
- Leading contributor to the eSIM standardization & interoperability
- Fully interoperable with all GSMA-compliant eUICC vendors
- Broadest portfolio of state-of-the-art eSIM solutions - compliant with GSMA eSIM specifications and eSIM Remote Provisioning Architecture
- Adheres Global Platform security domain standards for segregation of MNO profiles
- eSIM subscription management based on PKI architecture
- Working with over 450 mobile network operators, Thales manages the largest base of MNO subscription profiles
- Most extensive base of SIM Over-The-Air and Device Management platforms worldwide (respectively 300+ and 100 references)
- Uniquely positioned thanks to relationship with OEMs and Operating System manufacturers, both from M2M and consumer markets
- Extensive portfolio of complementary solutions, Trusted Digital Identity, Roaming, OTA and Device Management to enrich customer experience and use cases

