

# Scaling eSIM globally

## Developments and trends shaping growth

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AUTHOR

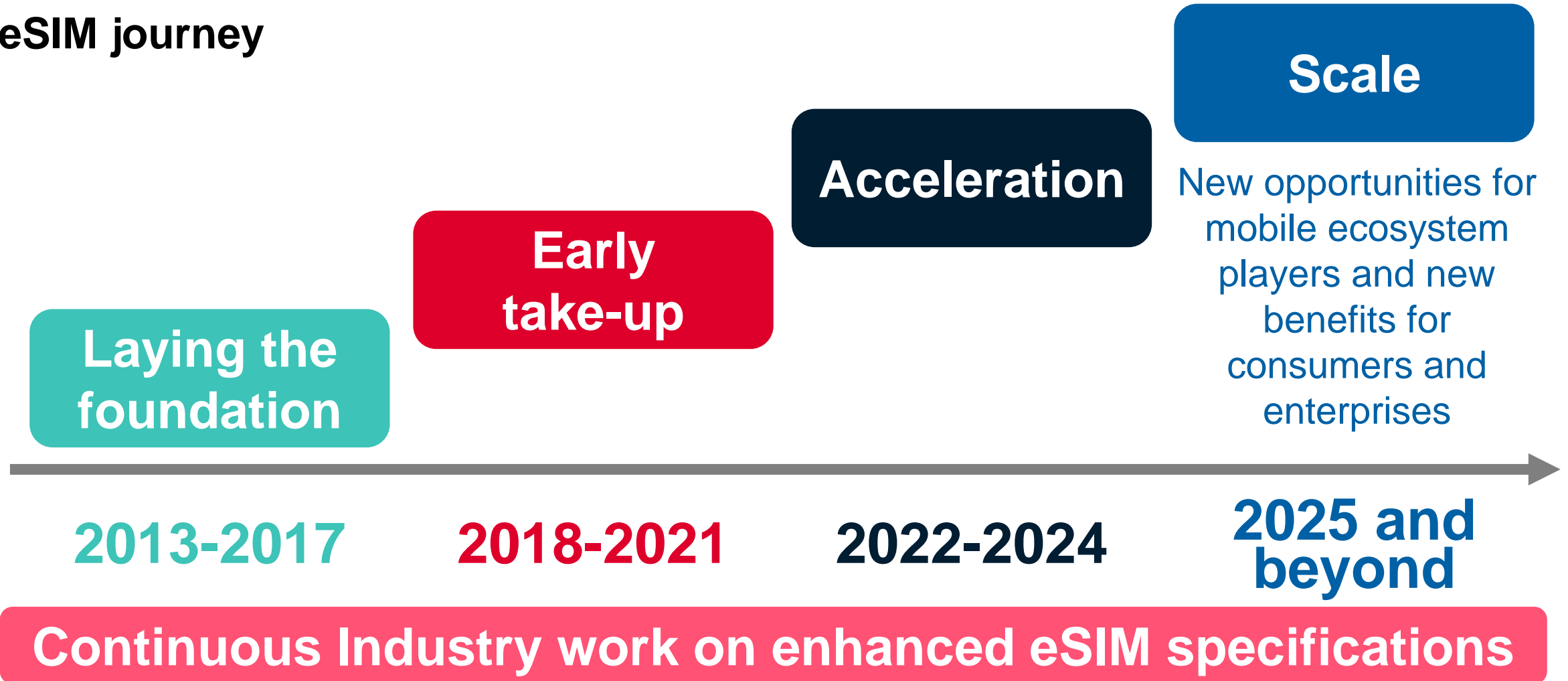
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# eSIM: time to scale globally

Transforming connectivity for Consumers and Industries

eSIM journey



# eSIM for Consumers

## eSIM is now a reality...looking for scale

### eSIM is now (almost) global

Number of  
consumer eSIM  
devices that have  
been launched\*

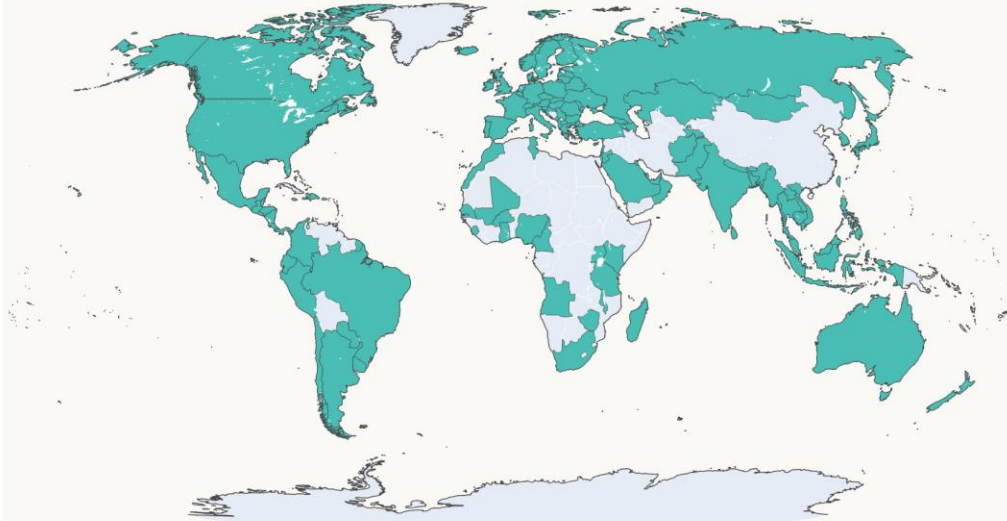
271

Number of operators  
that have launched  
eSIM service  
for smartphones\*\*

441

Number of countries  
that have launched  
eSIM service for  
smartphones\*\*\*

123



Data as of June 2024. \* Sum of smartphones, tablets and smartwatches (cumulative). \*\* Sum of MNOs, MVNOs and global providers of international roaming services. \*\*\* Excluding eSIM service for international roaming

Source: GSMA Intelligence

### Scaling eSIM takes time

- **Consumer awareness** of eSIM has doubled in the last few years...
- ...**BUT eSIM adoption in the smartphone market** has been slower than expected. The US is the only exception (following the launch of eSIM-only iPhones in 2022)
- **More work to do across multiple areas**
- **Growth outlook is encouraging:** 76% eSIM penetration by 2030 globally
- **eSIM for international travel** is emerging as a successful use case

# Travel eSIM

## A clear use case for eSIM, capturing consumer interest

There is growing use of eSIM for international roaming, which explains the proliferation of global providers of roaming connectivity services (e.g. Airalo, Holafly, eSIM.me) and growing interest among operators in monetising inbound roaming through eSIM

**50%** of consumers  
are aware of eSIM



**19%** of eSIM-aware  
consumers use eSIM



**51%** of eSIM users used  
eSIM service while travelling  
abroad for leisure or personal  
reasons in the past 12 months



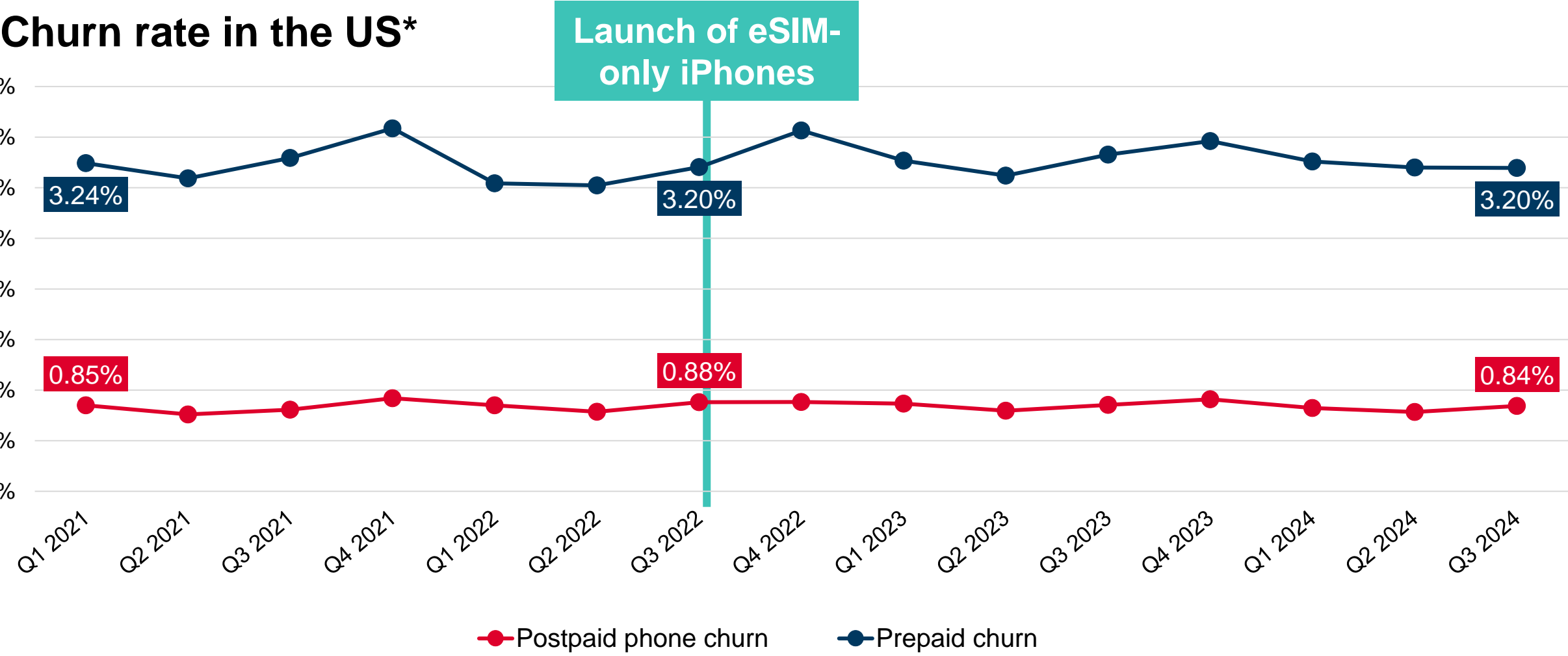
**28%** of travel eSIM users  
purchased an eSIM service  
provided by a global provider of  
international roaming connectivity  
services



Average figures across 11 countries: Australia, France, Germany, Italy, Japan, Poland, South Korea, Spain, UAE, UK, US.

# eSIM doesn't increase consumer churn

In the US, rapid adoption of eSIM has had no impact on churn



Source: Operator reported data and GSMA Intelligence. \* Simple average of AT&T, T-Mobile US and Verizon

# eSIM for Industries

An important enabler and driver of IoT deployments

## eSIM so far

### Automotive

eSIM is already mainstream in connected vehicles

### Beyond Automotive

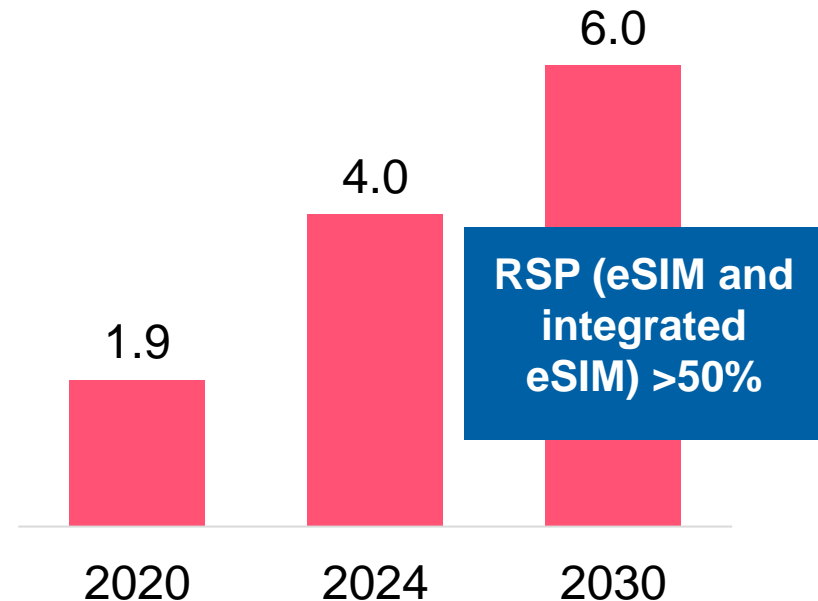
Single eSIM initiatives rather than sector-wide deployments

## New trends should accelerate adoption of eSIM

- New, enhanced **eSIM specifications for IoT**
- Growing range of **eSIM IoT devices** and **eSIM products/solutions** from SIM vendors (aiming for global capabilities and coverage)
- Growing rollout of **private networks**
- eSIM supporting the **sustainability imperative**

## IoT cellular connections

Globally. Billion. Total, all SIM form factors



# Scaling eSIM for Industries

## eSIM needs to address IoT deployment challenges

### IoT deployment challenges faced by enterprises: the top three

Survey of ~4200 enterprises across 10 vertical sectors and 21 countries

- 1** Cost of implementation
- 2** Potential security vulnerabilities
- 3** Integration of IoT tech with other existing technologies

### What enterprises expect from eSIM: the top three benefits

Survey of ~4200 enterprises across 10 vertical sectors and 21 countries

- 1** Security
- 2** Scalability
- 3** Simplify and reduce logistical and manufacturing costs



# About GSMA Intelligence

[info@gsmaintelligence.com](mailto:info@gsmaintelligence.com)

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The background of the slide features a dark blue field filled with numerous small, glowing points of light in shades of blue, red, and yellow. Overlaid on this field are several concentric, glowing circles in a light blue or cyan color, creating a sense of depth and motion, similar to a stylized representation of a galaxy or a data visualization.

# THANK YOU!

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