

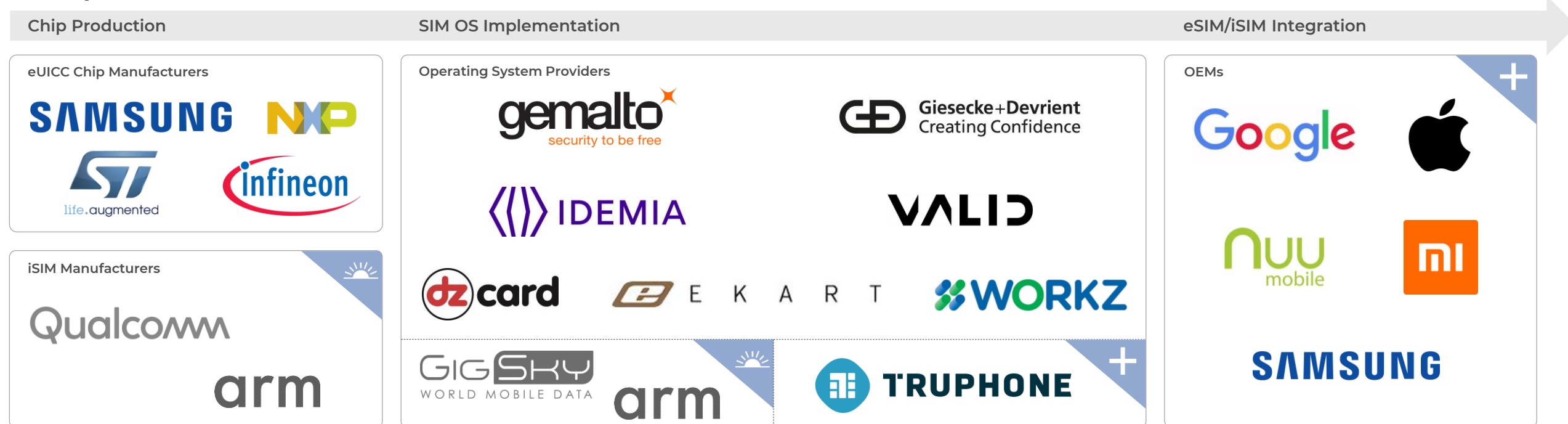
# eSIM Industry Landscape

## Enabling Connectivity for Consumer Smartphones

### Subscription and Profile Activation: M(V)NO-Related Processes\*



### Smartphone eSIM Enablement



New players in the eSIM landscape



Examples of players that must adjust their products to the eSIM-specific challenges



New players preparing to enter the market



Examples of players becoming less relevant in the eSIM landscape

\*MNOs and (OTT) MVNOs are excluded from the overview.