

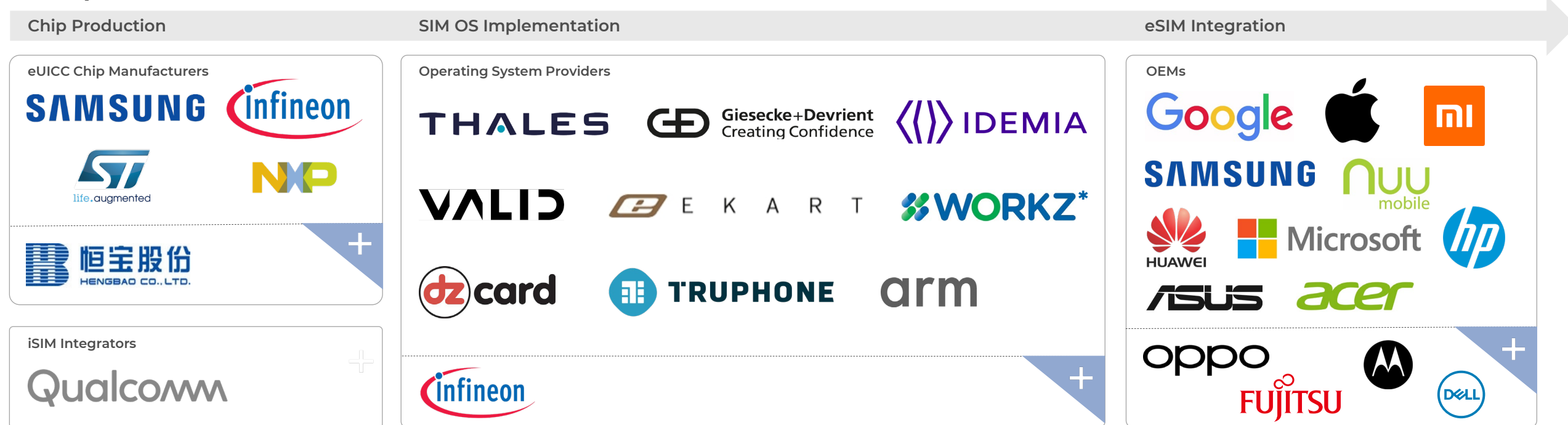
eSIM Industry Landscape 2020

Enabling Connectivity for Consumer eSIM Devices

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



Smartphone eSIM Enablement



+ New players in the eSIM landscape
 zzz 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
 * Resellers of the service/product
 ** MNOs and (OTT) MVNOs are excluded from the overview.



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