

Global eSIM Market By Application (M2M and Consumer Electronics), M2M type is further classified into Automotive, Energy & Utilities and Others), By Solution (Connectivity Services and Hardware), By Region, Industry Analysis and Forecast, 2020 - 2026

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Abstracts

The Global eSIM Market size is expected to reach \$19.2 billion by 2026, rising at a market growth of 17% CAGR during the forecast period. Embedded Subscriber Identity Module (eSIM), also known as the Embedded Universal Integrated Circuit Card (eUICC), is a reprogrammable chip that is made available across the market either in soldered or in a removable form. It is a small chip which is used to authenticate the identity of the user with his carrier. ESIM is smart in terms of functions as it supports multiple accounts, enables switching to different mobile network operators (MNOs), and manages accounts simply by updating the user's mobile phone software settings.

With the gradual growth of smart connected devices in every vertical market, the need for unified, scalable network-based devices is increasingly growing. The need for remote connectivity to manage devices is increasing. The number of smart system vendors is growing increasingly to support this need. ESIMs are becoming increasingly popular, as they enable users to manage all connected devices from remote locations, including cars, mobile phones, wearables, medical devices and others. ESIMs are becoming increasingly common with manufacturers of smart devices, as these SIMs have both 'Machine to Machine' capabilities and remote provisioning.

It is also expected that the global eSIM market will be fueled by the growing adoption of these SIMs by leading mobile manufacturers including Google and Apple.

Manufacturers of smartphones are likely to allow eSIMs to boost their product offerings. On the other hand, users can only pick one profile from every profile at a time. This is a major disadvantage for eSIMs, which restrains market growth. Also, being a sophisticated technological evolution, the compatibility, connectivity and other issues

with different manufacturers' smart devices is also one of the major challenges for eSIM market growth.

Based on Application, the market is segmented into M2M and Consumer Electronics. M2M type is further classified into Automotive, Energy & Utilities and Others. Based on Solution, the market is segmented into Connectivity Services and Hardware. Based on Regions, the market is segmented into North America, Europe, Asia Pacific, and Latin America, Middle East & Africa.

The major strategies followed by the market participants are Partnerships and Product Launches. Based on the Analysis presented in the Cardinal matrix, Deutsche Telekom AG, Telefonica S.A., and Singapore Telecommunications Limited are the forerunners in the eSIM Market. Companies such as STMicroelectronics N.V., Thales Group S.A., Infineon Technologies AG, Giesecke & Devrient GmbH, Sierra Wireless, Inc., NXP Semiconductors N.V., and NTT Data Corporation are some of the key innovators in the market.

The market research report covers the analysis of key stake holders of the market. Key companies profiled in the report include Thales Group S.A. (Gemalto NV), Infineon Technologies AG, NXP Semiconductors N.V., STMicroelectronics N.V., Telefonica S.A., NTT Data Corporation, Giesecke & Devrient GmbH, Deutsche Telekom AG, Singapore Telecommunications Limited, Sierra Wireless, Inc.

Recent strategies deployed in eSIM Market

Partnerships, Collaborations, and Agreements:

May-2020: Thales announced its collaboration with Google Cloud for expanding its eSIM Management Solution. Under this collaboration, Thales would use Google Cloud technology for providing highly secure and scalable activation of eSIM (embedded SIM) capable devices. Thales deployed the world's first GSMA-certified eSIM activation solution on Google Cloud. This solution offers telecom operators secure and highly scalable support to manage increases in mobile subscriptions for eSIM-capable devices.

Mar-2020: STMicroelectronics collaborated with Truphone, a GSMA accredited global mobile network that operates its service internationally. The collaboration was aimed to launch a full-stack embedded SIM (eSIM) infrastructure solution. This solution was compliant with GSMA Machine-to-Machine (M2M) standards for Industrial IoT and automotive customers.

Oct-2019: Deutsche Telekom came into partnership with COMPRION, a leader in smart card compliance. The partnership was focused on developing a test system for the nuSIM initiative. COMPRION was aimed to provide test system expertise for developing qualification and functional certification program for single entities in the nuSIM

ecosystem. nuSIM is a strictly optimized integrated SIM solution that would bring several new attributes to the IoT value chain, e.g. significant cost reduction, space savings, and increased overall simplicity.

Jul-2019: Deutsche Telekom collaborated with IDEMIA, a provider of security and identity solutions. Deutsche Telekom selected IDEMIA's solution to ramp up its efforts to accelerate the launch of eSIM-enabled devices in its European affiliates. IDEMIA's Smart Connect Entitlement ensured Deutsche Telekom will always have the very latest OEM specifications to support smartphones, wearables, and tablets on a cost-effective and easy to deploy platform.

May-2019: Infineon signed an agreement with Arrow Electronics and Arkessa. This agreement extended Arrow's ability for supporting customers with cellular communications for the Internet of Things (IoT). In this agreement, Infineon aimed to provide the secured hardware controllers based on GSMA's Embedded Subscriber Identity Module (eSIM) specification that underpin the new service whereas Arkessa was focused on providing secured mobile data services with the ability to provide and manage IoT devices from the factory into the field easily and effectively.

Feb-2019: STMicroelectronics teamed up with Sequans Communications, a company that markets integrated circuits for 4G mobile phone technology. The collaboration was aimed to bring LTE for IoT connectivity to the MCU ecosystem and accelerate its adoption. Following this collaboration, the companies have developed a dedicated cellular extension board for STM32 Discovery kits based on Sequans' Monarch LTE-M/NB-IoT technology. ST also enlarged its STM32CUBE cellular software library to support Sequans' existing Monarch-based module, GM01Q. The kit includes a switchable SIM interface, eSIM, and MicroSIM, a high-performance antenna for frequencies between 700 MHz – 2100 MHz, and free drivers and code examples.

Acquisition and Mergers:

Apr-2020: Infineon Technologies acquired Cypress Semiconductor Corporation. The acquisition strengthened Infineon's broader range of applications. Cypress added a differentiated portfolio of microcontrollers, connectivity components, software ecosystems, and high-performance memories.

Jan-2020: Sierra Wireless took over the M2M group of companies, a company focused on IoT connectivity services and cellular devices in Australia. The acquisition broadened Sierra Wireless' IoT solutions business in the Asia-Pacific region.

Dec-2019: NXP Semiconductors completed the acquisition of Marvell's Wireless Connectivity portfolio. The acquisition enabled NXP to provide complete, scalable processing, and connectivity solutions to the customers across the end markets.

Mar-2019: NTT Communications took over Transatel, a global Internet of Things (IoT) cellular connectivity management provider and Mobile Virtual Network Enabler (MVNE). The acquisition enabled NTT to drastically extend its Global IoT solution offering.

Sep-2018: NXP took over OmniPHY, a provider of automotive Ethernet subsystem technology. Following the acquisition, the latter company's interface IP and communication technology have been combined with NXP's automotive portfolio. The acquisition enabled NXP to provide secure connections and infrastructure for embedded applications.

Product Launches and Product Expansions:

Mar-2020: Infineon Technologies extended its embedded SIM (eSIM) portfolio with the launch of OPTIGA Connect eSIM solution for mobile consumer devices. This solution supports all GSMA standards from 3G to 5G and securely authenticates the device to the subscribed carrier network of choice. It is the perfect match for smartphones, tablets, and wearables like smartwatches or fitness trackers.

Feb-2020: STMicroelectronics unveiled ST4SIM, a complete ecosystem for securely connecting Industrial IoT (IIoT) and automotive systems to cellular networks. ST4SIM offering includes automotive and industrial-grade embedded SIM (eSIM) SoCs in addition to standard machine-to-machine SIM.

Feb-2019: Deutsche Telekom launched nuSIM, a new system. This system provides embedded SIM (eSIM) functions at a price-point suited for low-cost IoT devices.

Scope of the Study

Market Segmentation:

By Application

M2M

Automotive

Energy & Utilities

Others

Consumer Electronics

By Solution

Connectivity Services

Hardware

By Geography

North America

US

Canada

Mexico

Rest of North America

Europe

Germany

UK

France

Russia

Spain

Italy

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Singapore

Malaysia

Rest of Asia Pacific

LAMEA

Brazil

Argentina

UAE

Saudi Arabia

South Africa

Nigeria

Rest of LAMEA

Companies Profiled

Thales Group S.A. (Gemalto NV)

Infineon Technologies AG

NXP Semiconductors N.V.

STMicroelectronics N.V.

Telefonica S.A.

NTT Data Corporation

Giesecke & Devrient GmbH

Deutsche Telekom AG

Singapore Telecommunications Limited

Sierra Wireless, Inc.

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Contents

CHAPTER 1. MARKET SCOPE & METHODOLOGY

- 1.1 Market Definition
- 1.2 Objectives
- 1.3 Market Scope
- 1.4 Segmentation
 - 1.4.1 Global eSIM Market, by Application
 - 1.4.2 Global eSIM Market, by Solution
 - 1.4.3 Global eSIM Market, by Geography
- 1.5 Methodology for the research

CHAPTER 2. MARKET OVERVIEW

- 2.1 Introduction
 - 2.1.1 Overview
 - 2.1.2 Executive Summary
 - 2.1.3 Market Composition and Scenario
- 2.2 Key Factors Impacting the Market
 - 2.2.1 Market Drivers
 - 2.2.2 Market Restraints

CHAPTER 3. COMPETITION ANALYSIS - GLOBAL

- 3.1 KBV Cardinal Matrix
- 3.2 Recent Industry Wide Strategic Developments
 - 3.2.1 Partnerships, Collaborations and Agreements
 - 3.2.2 Product Launches and Product Expansions
 - 3.2.3 Mergers & Acquisitions
- 3.3 Top Winning Strategies
 - 3.3.1 Key Leading Strategies: Percentage Distribution (2016-2020)
 - 3.3.2 Key Strategic Move: (Partnerships, Collaborations, and Agreements: 2016, Feb – 2020, May) Leading Players

CHAPTER 4. GLOBAL ESIM MARKET BY APPLICATION

- 4.1 Global eSIM M2M Market by Region
- 4.2 Global eSIM Market by M2M Type

- 4.2.1 Global eSIM Automotive Market by Region
- 4.2.2 Global eSIM Energy & Utilities Market by Region
- 4.2.3 Global eSIM Others Market by Region
- 4.3 Global eSIM Consumer Electronics Market by Region

CHAPTER 5. GLOBAL ESIM MARKET BY SOLUTION

- 5.1 Global Connectivity Services eSIM Market by Region
- 5.2 Global Hardware eSIM Market by Region

CHAPTER 6. GLOBAL ESIM MARKET BY REGION

- 6.1 North America eSIM Market
 - 6.1.1 North America eSIM Market by Application
 - 6.1.1.1 North America eSIM M2M Market by Country
 - 6.1.1.2 North America eSIM Market by M2M Type
 - 6.1.1.2.1 North America eSIM Automotive Market by Country
 - 6.1.1.2.2 North America eSIM Energy & Utilities Market by Country
 - 6.1.1.2.3 North America eSIM Others Market by Country
 - 6.1.1.3 North America eSIM Consumer Electronics Market by Country
 - 6.1.2 North America eSIM Market by Solution
 - 6.1.2.1 North America Connectivity Services eSIM Market by Country
 - 6.1.2.2 North America Hardware eSIM Market by Country
 - 6.1.3 North America eSIM Market by Country
 - 6.1.3.1 US eSIM Market
 - 6.1.3.1.1 US eSIM Market by Application
 - 6.1.3.1.2 US eSIM Market by Solution
 - 6.1.3.2 Canada eSIM Market
 - 6.1.3.2.1 Canada eSIM Market by Application
 - 6.1.3.2.2 Canada eSIM Market by Solution
 - 6.1.3.3 Mexico eSIM Market
 - 6.1.3.3.1 Mexico eSIM Market by Application
 - 6.1.3.3.2 Mexico eSIM Market by Solution
 - 6.1.3.4 Rest of North America eSIM Market
 - 6.1.3.4.1 Rest of North America eSIM Market by Application
 - 6.1.3.4.2 Rest of North America eSIM Market by Solution
- 6.2 Europe eSIM Market
 - 6.2.1 Europe eSIM Market by Application
 - 6.2.1.1 Europe eSIM M2M Market by Country

- 6.2.1.2 Europe eSIM Market by M2M Type
 - 6.2.1.2.1 Europe eSIM Automotive Market by Country
 - 6.2.1.2.2 Europe eSIM Energy & Utilities Market by Country
 - 6.2.1.2.3 Europe eSIM Others Market by Country
- 6.2.1.3 Europe eSIM Consumer Electronics Market by Country
- 6.2.2 Europe eSIM Market by Solution
 - 6.2.2.1 Europe Connectivity Services eSIM Market by Country
 - 6.2.2.2 Europe Hardware eSIM Market by Country
- 6.2.3 Europe eSIM Market by Country
 - 6.2.3.1 Germany eSIM Market
 - 6.2.3.1.1 Germany eSIM Market by Application
 - 6.2.3.1.2 Germany eSIM Market by Solution
 - 6.2.3.2 UK eSIM Market
 - 6.2.3.2.1 UK eSIM Market by Application
 - 6.2.3.2.2 UK eSIM Market by Solution
 - 6.2.3.3 France eSIM Market
 - 6.2.3.3.1 France eSIM Market by Application
 - 6.2.3.3.2 France eSIM Market by Solution
 - 6.2.3.4 Russia eSIM Market
 - 6.2.3.4.1 Russia eSIM Market by Application
 - 6.2.3.4.2 Russia eSIM Market by Solution
 - 6.2.3.5 Spain eSIM Market
 - 6.2.3.5.1 Spain eSIM Market by Application
 - 6.2.3.5.2 Spain eSIM Market by Solution
 - 6.2.3.6 Italy eSIM Market
 - 6.2.3.6.1 Italy eSIM Market by Application
 - 6.2.3.6.2 Italy eSIM Market by Solution
 - 6.2.3.7 Rest of Europe eSIM Market
 - 6.2.3.7.1 Rest of Europe eSIM Market by Application
 - 6.2.3.7.2 Rest of Europe eSIM Market by Solution
- 6.3 Asia Pacific eSIM Market
 - 6.3.1 Asia Pacific eSIM Market by Application
 - 6.3.1.1 Asia Pacific eSIM M2M Market by Country
 - 6.3.1.2 Asia Pacific eSIM Market by M2M Type
 - 6.3.1.2.1 Asia Pacific eSIM Automotive Market by Country
 - 6.3.1.2.2 Asia Pacific eSIM Energy & Utilities Market by Country
 - 6.3.1.2.3 Asia Pacific eSIM Others Market by Country
 - 6.3.1.3 Asia Pacific eSIM Consumer Electronics Market by Country
 - 6.3.2 Asia Pacific eSIM Market by Solution

- 6.3.2.1 Asia Pacific Connectivity Services eSIM Market by Country
- 6.3.2.2 Asia Pacific Hardware eSIM Market by Country
- 6.3.3 Asia Pacific eSIM Market by Country
 - 6.3.3.1 China eSIM Market
 - 6.3.3.1.1 China eSIM Market by Application
 - 6.3.3.1.2 China eSIM Market by Solution
 - 6.3.3.2 Japan eSIM Market
 - 6.3.3.2.1 Japan eSIM Market by Application
 - 6.3.3.2.2 Japan eSIM Market by Solution
 - 6.3.3.3 India eSIM Market
 - 6.3.3.3.1 India eSIM Market by Application
 - 6.3.3.3.2 India eSIM Market by Solution
 - 6.3.3.4 South Korea eSIM Market
 - 6.3.3.4.1 South Korea eSIM Market by Application
 - 6.3.3.4.2 South Korea eSIM Market by Solution
 - 6.3.3.5 Singapore eSIM Market
 - 6.3.3.5.1 Singapore eSIM Market by Application
 - 6.3.3.5.2 Singapore eSIM Market by Solution
 - 6.3.3.6 Malaysia eSIM Market
 - 6.3.3.6.1 Malaysia eSIM Market by Application
 - 6.3.3.6.2 Malaysia eSIM Market by Solution
 - 6.3.3.7 Rest of Asia Pacific eSIM Market
 - 6.3.3.7.1 Rest of Asia Pacific eSIM Market by Application
 - 6.3.3.7.2 Rest of Asia Pacific eSIM Market by Solution
- 6.4 LAMEA eSIM Market
 - 6.4.1 LAMEA eSIM Market by Application
 - 6.4.1.1 LAMEA eSIM M2M Market by Country
 - 6.4.1.2 LAMEA eSIM Market by M2M Type
 - 6.4.1.2.1 LAMEA eSIM Automotive Market by Country
 - 6.4.1.2.2 LAMEA eSIM Energy & Utilities Market by Country
 - 6.4.1.2.3 LAMEA eSIM Others Market by Country
 - 6.4.1.2.4 LAMEA eSIM Consumer Electronics Market by Country
 - 6.4.2 LAMEA eSIM Market by Solution
 - 6.4.2.1 LAMEA Connectivity Services eSIM Market by Country
 - 6.4.2.2 LAMEA Hardware eSIM Market by Country
 - 6.4.3 LAMEA eSIM Market by Country
 - 6.4.3.1 Brazil eSIM Market
 - 6.4.3.1.1 Brazil eSIM Market by Application
 - 6.4.3.1.2 Brazil eSIM Market by Solution

- 6.4.3.2 Argentina eSIM Market
 - 6.4.3.2.1 Argentina eSIM Market by Application
 - 6.4.3.2.2 Argentina eSIM Market by Solution
- 6.4.3.3 UAE eSIM Market
 - 6.4.3.3.1 UAE eSIM Market by Application
 - 6.4.3.3.2 UAE eSIM Market by Solution
- 6.4.3.4 Saudi Arabia eSIM Market
 - 6.4.3.4.1 Saudi Arabia eSIM Market by Application
 - 6.4.3.4.2 Saudi Arabia eSIM Market by Solution
- 6.4.3.5 South Africa eSIM Market
 - 6.4.3.5.1 South Africa eSIM Market by Application
 - 6.4.3.5.2 South Africa eSIM Market by Solution
- 6.4.3.6 Nigeria eSIM Market
 - 6.4.3.6.1 Nigeria eSIM Market by Application
 - 6.4.3.6.2 Nigeria eSIM Market by Solution
- 6.4.3.7 Rest of LAMEA eSIM Market
 - 6.4.3.7.1 Rest of LAMEA eSIM Market by Application
 - 6.4.3.7.2 Rest of LAMEA eSIM Market by Solution

CHAPTER 7. COMPANY PROFILES

- 7.1 Thales Group S.A. (Gemalto NV)
 - 7.1.1 Company Overview
 - 7.1.2 Financial Analysis
 - 7.1.3 Segmental and Regional Analysis
 - 7.1.1 Research and Development Expense
 - 7.1.2 Recent strategies and developments:
 - 7.1.2.1 Partnerships, Collaborations, and Agreements:
 - 7.1.3 SWOT Analysis
- 7.2 Infineon Technologies AG
 - 7.2.1 Company Overview
 - 7.2.2 Financial Analysis
 - 7.2.3 Segmental and Regional Analysis
 - 7.2.4 Research & Development Expense
 - 7.2.5 Recent strategies and developments:
 - 7.2.5.1 Partnerships, Collaborations, and Agreements:
 - 7.2.5.2 Acquisition and Mergers:
 - 7.2.5.3 Product Launches and Product Expansions:
 - 7.2.6 SWOT Analysis

7.3 NXP Semiconductors N.V.

7.3.1 Company Overview

7.3.2 Financial Analysis

7.3.3 Regional Analysis

7.3.4 Research & Development Expense

7.3.5 Recent strategies and developments:

7.3.5.1 Acquisition and Mergers:

7.3.6 SWOT Analysis

7.4 STMicroelectronics N.V.

7.4.1 Company Overview

7.4.2 Financial Analysis

7.4.3 Segmental and Regional Analysis

7.4.4 Research & Development Expense

7.4.5 Recent strategies and developments:

7.4.5.1 Partnerships, Collaborations, and Agreements:

7.4.5.2 Product Launches and Product Expansions:

7.4.6 SWOT Analysis

7.5 Telefonica S.A.

7.5.1 Company Overview

7.5.2 Financial Analysis

7.5.3 Segmental Analysis

7.5.4 Research & Development Expense

7.5.5 Recent strategies and developments:

7.5.5.1 Partnerships, Collaborations, and Agreements:

7.6 NTT Data Corporation

7.6.1 Company overview

7.6.2 Financial Analysis

7.6.3 Segmental Analysis

7.6.4 Research & Development Expense

7.6.5 Recent strategies and developments:

7.6.5.1 Partnerships, Collaborations, and Agreements:

7.6.5.2 Acquisition and Mergers:

7.6.5.3 Product Launches and Product Expansions:

7.6.6 SWOT Analysis

7.7 Giesecke & Devrient GmbH

7.7.1 Company Overview

7.7.2 Financial Analysis

7.7.3 Research & Development Expense

7.7.4 Recent strategies and developments:

- 7.7.4.1 Partnerships, Collaborations, and Agreements:
- 7.7.4.2 Product Launches and Product Expansions:
- 7.7.5 SWOT Analysis
- 7.8 Deutsche Telekom AG
 - 7.8.1 Company Overview
 - 7.8.2 Financial Analysis
 - 7.8.3 Segmental Analysis
 - 7.8.4 Research & Development Expenses
 - 7.8.5 Recent strategies and developments:
 - 7.8.5.1 Partnerships, Collaborations, and Agreements:
 - 7.8.5.2 Product Launches and Product Expansions:
- 7.9 Singapore Telecommunications Limited
 - 7.9.1 Company Overview
 - 7.9.2 Financial Analysis
 - 7.9.3 Segmental Analysis
 - 7.9.4 Recent strategies and developments:
 - 7.9.4.1 Product Launches and Product Expansions:
- 7.1 Sierra Wireless, Inc.
 - 7.10.1 Company overview
 - 7.10.2 Financial Analysis
 - 7.10.3 Segmental and Regional Analysis
 - 7.10.4 Research & Development Expenses
 - 7.10.5 Recent strategies and developments:
 - 7.10.5.1 Acquisition and Mergers:

List Of Tables

LIST OF TABLES

TABLE 1 GLOBAL ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 2 GLOBAL ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 3 PARTNERSHIPS, COLLABORATIONS AND AGREEMENTS– ESIM MARKET

TABLE 4 PRODUCT LAUNCHES AND PRODUCT EXPANSIONS– ESIM MARKET

TABLE 5 MERGERS & ACQUISITIONS – ESIM MARKET

TABLE 6 GLOBAL ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 7 GLOBAL ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 8 GLOBAL ESIM M2M MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 9 GLOBAL ESIM M2M MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 10 GLOBAL ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 11 GLOBAL ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 12 GLOBAL ESIM AUTOMOTIVE MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 13 GLOBAL ESIM AUTOMOTIVE MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 14 GLOBAL ESIM ENERGY & UTILITIES MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 15 GLOBAL ESIM ENERGY & UTILITIES MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 16 GLOBAL ESIM OTHERS MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 17 GLOBAL ESIM OTHERS MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 18 GLOBAL ESIM CONSUMER ELECTRONICS MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 19 GLOBAL ESIM CONSUMER ELECTRONICS MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 20 GLOBAL ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 21 GLOBAL ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 22 GLOBAL CONNECTIVITY SERVICES ESIM MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 23 GLOBAL CONNECTIVITY SERVICES ESIM MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 24 GLOBAL HARDWARE ESIM MARKET BY REGION, 2016 - 2019, USD

MILLION

TABLE 25 GLOBAL HARDWARE ESIM MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 26 GLOBAL ESIM MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 27 GLOBAL ESIM MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 28 NORTH AMERICA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 29 NORTH AMERICA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 30 NORTH AMERICA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 31 NORTH AMERICA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 32 NORTH AMERICA ESIM M2M MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 33 NORTH AMERICA ESIM M2M MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 34 NORTH AMERICA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 35 NORTH AMERICA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 36 NORTH AMERICA ESIM AUTOMOTIVE MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 37 NORTH AMERICA ESIM AUTOMOTIVE MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 38 NORTH AMERICA ESIM ENERGY & UTILITIES MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 39 NORTH AMERICA ESIM ENERGY & UTILITIES MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 40 NORTH AMERICA ESIM OTHERS MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 41 NORTH AMERICA ESIM OTHERS MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 42 NORTH AMERICA ESIM CONSUMER ELECTRONICS MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 43 NORTH AMERICA ESIM CONSUMER ELECTRONICS MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 44 NORTH AMERICA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 45 NORTH AMERICA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 46 NORTH AMERICA CONNECTIVITY SERVICES ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 47 NORTH AMERICA CONNECTIVITY SERVICES ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 48 NORTH AMERICA HARDWARE ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 49 NORTH AMERICA HARDWARE ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 50 NORTH AMERICA ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 51 NORTH AMERICA ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 52 US ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 53 US ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 54 US ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 55 US ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 56 US ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 57 US ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 58 US ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 59 US ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 60 CANADA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 61 CANADA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 62 CANADA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 63 CANADA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 64 CANADA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 65 CANADA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 66 CANADA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 67 CANADA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 68 MEXICO ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 69 MEXICO ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 70 MEXICO ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 71 MEXICO ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 72 MEXICO ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 73 MEXICO ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 74 MEXICO ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 75 MEXICO ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 76 REST OF NORTH AMERICA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 77 REST OF NORTH AMERICA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 78 REST OF NORTH AMERICA ESIM MARKET BY APPLICATION, 2016 -

2019, USD MILLION

TABLE 79 REST OF NORTH AMERICA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 80 REST OF NORTH AMERICA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 81 REST OF NORTH AMERICA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 82 REST OF NORTH AMERICA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 83 REST OF NORTH AMERICA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 84 EUROPE ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 85 EUROPE ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 86 EUROPE ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 87 EUROPE ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 88 EUROPE ESIM M2M MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 89 EUROPE ESIM M2M MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 90 EUROPE ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 91 EUROPE ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 92 EUROPE ESIM AUTOMOTIVE MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 93 EUROPE ESIM AUTOMOTIVE MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 94 EUROPE ESIM ENERGY & UTILITIES MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 95 EUROPE ESIM ENERGY & UTILITIES MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 96 EUROPE ESIM OTHERS MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 97 EUROPE ESIM OTHERS MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 98 EUROPE ESIM CONSUMER ELECTRONICS MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 99 EUROPE ESIM CONSUMER ELECTRONICS MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 100 EUROPE ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 101 EUROPE ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 102 EUROPE CONNECTIVITY SERVICES ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 103 EUROPE CONNECTIVITY SERVICES ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 104 EUROPE HARDWARE ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 105 EUROPE HARDWARE ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 106 EUROPE ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 107 EUROPE ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 108 GERMANY ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 109 GERMANY ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 110 GERMANY ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 111 GERMANY ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 112 GERMANY ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 113 GERMANY ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 114 GERMANY ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 115 GERMANY ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 116 UK ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 117 UK ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 118 UK ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 119 UK ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 120 UK ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 121 UK ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 122 UK ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 123 UK ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 124 FRANCE ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 125 FRANCE ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 126 FRANCE ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 127 FRANCE ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 128 FRANCE ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 129 FRANCE ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 130 FRANCE ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 131 FRANCE ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 132 RUSSIA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 133 RUSSIA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 134 RUSSIA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 135 RUSSIA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 136 RUSSIA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 137 RUSSIA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 138 RUSSIA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 139 RUSSIA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 140 SPAIN ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 141 SPAIN ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 142 SPAIN ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 143 SPAIN ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 144 SPAIN ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 145 SPAIN ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 146 SPAIN ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 147 SPAIN ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 148 ITALY ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 149 ITALY ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 150 ITALY ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 151 ITALY ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 152 ITALY ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 153 ITALY ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 154 ITALY ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 155 ITALY ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 156 REST OF EUROPE ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 157 REST OF EUROPE ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 158 REST OF EUROPE ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 159 REST OF EUROPE ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 160 REST OF EUROPE ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 161 REST OF EUROPE ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 162 REST OF EUROPE ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 163 REST OF EUROPE ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 164 ASIA PACIFIC ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 165 ASIA PACIFIC ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 166 ASIA PACIFIC ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 167 ASIA PACIFIC ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 168 ASIA PACIFIC ESIM M2M MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 169 ASIA PACIFIC ESIM M2M MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 170 ASIA PACIFIC ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 171 ASIA PACIFIC ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 172 ASIA PACIFIC ESIM AUTOMOTIVE MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 173 ASIA PACIFIC ESIM AUTOMOTIVE MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 174 ASIA PACIFIC ESIM ENERGY & UTILITIES MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 175 ASIA PACIFIC ESIM ENERGY & UTILITIES MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 176 ASIA PACIFIC ESIM OTHERS MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 177 ASIA PACIFIC ESIM OTHERS MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 178 ASIA PACIFIC ESIM CONSUMER ELECTRONICS MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 179 ASIA PACIFIC ESIM CONSUMER ELECTRONICS MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 180 ASIA PACIFIC ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 181 ASIA PACIFIC ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 182 ASIA PACIFIC CONNECTIVITY SERVICES ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 183 ASIA PACIFIC CONNECTIVITY SERVICES ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 184 ASIA PACIFIC HARDWARE ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 185 ASIA PACIFIC HARDWARE ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 186 ASIA PACIFIC ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 187 ASIA PACIFIC ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 188 CHINA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 189 CHINA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 190 CHINA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 191 CHINA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 192 CHINA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 193 CHINA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 194 CHINA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 195 CHINA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 196 JAPAN ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 197 JAPAN ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 198 JAPAN ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 199 JAPAN ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 200 JAPAN ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 201 JAPAN ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 202 JAPAN ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 203 JAPAN ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 204 INDIA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 205 INDIA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 206 INDIA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 207 INDIA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 208 INDIA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 209 INDIA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 210 INDIA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 211 INDIA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 212 SOUTH KOREA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 213 SOUTH KOREA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 214 SOUTH KOREA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 215 SOUTH KOREA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 216 SOUTH KOREA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 217 SOUTH KOREA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 218 SOUTH KOREA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 219 SOUTH KOREA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 220 SINGAPORE ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 221 SINGAPORE ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 222 SINGAPORE ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 223 SINGAPORE ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 224 SINGAPORE ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 225 SINGAPORE ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 226 SINGAPORE ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 227 SINGAPORE ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 228 MALAYSIA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 229 MALAYSIA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 230 MALAYSIA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 231 MALAYSIA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 232 MALAYSIA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 233 MALAYSIA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 234 MALAYSIA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 235 MALAYSIA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 236 REST OF ASIA PACIFIC ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 237 REST OF ASIA PACIFIC ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 238 REST OF ASIA PACIFIC ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 239 REST OF ASIA PACIFIC ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 240 REST OF ASIA PACIFIC ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 241 REST OF ASIA PACIFIC ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 242 REST OF ASIA PACIFIC ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 243 REST OF ASIA PACIFIC ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 244 LAMEA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 245 LAMEA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 246 LAMEA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 247 LAMEA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 248 LAMEA ESIM M2M MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 249 LAMEA ESIM M2M MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 250 LAMEA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 251 LAMEA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 252 LAMEA ESIM AUTOMOTIVE MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 253 LAMEA ESIM AUTOMOTIVE MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 254 LAMEA ESIM ENERGY & UTILITIES MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 255 LAMEA ESIM ENERGY & UTILITIES MARKET BY COUNTRY, 2020 -

2026, USD MILLION

TABLE 256 LAMEA ESIM OTHERS MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 257 LAMEA ESIM OTHERS MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 258 LAMEA ESIM CONSUMER ELECTRONICS MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 259 LAMEA ESIM CONSUMER ELECTRONICS MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 260 LAMEA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 261 LAMEA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 262 LAMEA CONNECTIVITY SERVICES ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 263 LAMEA CONNECTIVITY SERVICES ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 264 LAMEA HARDWARE ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 265 LAMEA HARDWARE ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 266 LAMEA ESIM MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 267 LAMEA ESIM MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 268 BRAZIL ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 269 BRAZIL ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 270 BRAZIL ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 271 BRAZIL ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 272 BRAZIL ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 273 BRAZIL ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 274 BRAZIL ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 275 BRAZIL ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 276 ARGENTINA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 277 ARGENTINA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 278 ARGENTINA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 279 ARGENTINA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 280 ARGENTINA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 281 ARGENTINA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 282 ARGENTINA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 283 ARGENTINA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 284 UAE ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 285 UAE ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 286 UAE ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 287 UAE ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 288 UAE ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 289 UAE ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 290 UAE ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 291 UAE ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 292 SAUDI ARABIA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 293 SAUDI ARABIA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 294 SAUDI ARABIA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 295 SAUDI ARABIA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 296 SAUDI ARABIA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 297 SAUDI ARABIA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 298 SAUDI ARABIA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 299 SAUDI ARABIA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 300 SOUTH AFRICA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 301 SOUTH AFRICA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 302 SOUTH AFRICA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 303 SOUTH AFRICA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 304 SOUTH AFRICA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 305 SOUTH AFRICA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 306 SOUTH AFRICA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 307 SOUTH AFRICA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 308 NIGERIA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 309 NIGERIA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 310 NIGERIA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 311 NIGERIA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 312 NIGERIA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 313 NIGERIA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 314 NIGERIA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 315 NIGERIA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 316 REST OF LAMEA ESIM MARKET, 2016 - 2019, USD MILLION

TABLE 317 REST OF LAMEA ESIM MARKET, 2020 - 2026, USD MILLION

TABLE 318 REST OF LAMEA ESIM MARKET BY APPLICATION, 2016 - 2019, USD MILLION

TABLE 319 REST OF LAMEA ESIM MARKET BY APPLICATION, 2020 - 2026, USD MILLION

TABLE 320 REST OF LAMEA ESIM MARKET BY M2M TYPE, 2016 - 2019, USD MILLION

TABLE 321 REST OF LAMEA ESIM MARKET BY M2M TYPE, 2020 - 2026, USD MILLION

TABLE 322 REST OF LAMEA ESIM MARKET BY SOLUTION, 2016 - 2019, USD MILLION

TABLE 323 REST OF LAMEA ESIM MARKET BY SOLUTION, 2020 - 2026, USD MILLION

TABLE 324 KEY INFORMATION – THALES GROUP S.A.

TABLE 325 KEY INFORMATION – INFINEON TECHNOLOGIES AG

TABLE 326 KEY INFORMATION – NXP SEMICONDUCTORS N.V.

TABLE 327 KEY INFORMATION – STMICROELECTRONICS N.V.

TABLE 328 KEY INFORMATION – TELEFONICA S.A.

TABLE 329 KEY INFORMATION – NTT DATA CORPORATION

TABLE 330 KEY INFORMATION – GIESECKE & DEVRIENT GMBH

TABLE 331 KEY INFORMATION – DEUTSCHE TELEKOM AG

TABLE 332 KEY INFORMATION – SINGAPORE TELECOMMUNICATIONS LIMITED

TABLE 333 KEY INFORMATION – SIERRA WIRELESS, INC.

List Of Figures

LIST OF FIGURES

FIG 1 METHODOLOGY FOR THE RESEARCH

FIG 2 KBV CARDINAL MATRIX

FIG 3 KEY LEADING STRATEGIES: PERCENTAGE DISTRIBUTION (2016-2020)

FIG 4 KEY STRATEGIC MOVE: (PARTNERSHIPS, COLLABORATIONS, AND AGREEMENTS : 2016, FEB – 2020,MAY) LEADING PLAYERS

FIG 5 SWOT ANALYSIS: THALES GROUP S.A.

FIG 6 RECENT STRATEGIES AND DEVELOPMENTS: INFINEON TECHNOLOGIES AG

FIG 7 SWOT ANALYSIS: INFINEON TECHNOLOGIES AG

FIG 8 SWOT ANALYSIS: NXP SEMICONDUCTORS N.V.

FIG 9 RECENT STRATEGIES AND DEVELOPMENTS: STMICROELECTRONICS N.V.

FIG 10 SWOT ANALYSIS: STMICROELECTRONICS N.V.

FIG 11 RECENT STRATEGIES AND DEVELOPMENTS: NTT DATA CORPORATION

FIG 12 SWOT ANALYSIS: NTT DATA CORPORATION

FIG 13 RECENT STRATEGIES AND DEVELOPMENTS: GIESECKE & DEVRIENT GMBH

FIG 14 SWOT ANALYSIS: GIESECKE & DEVRIENT GMBH

FIG 15 RECENT STRATEGIES AND DEVELOPMENTS: DEUTSCHE TELEKOM AG

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