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Digital Identity & eSIM Market Forecasts to 2032 – Global Analysis By Component (eSIM Hardware, Identity Software Platforms, Connectivity & Lifecycle Management Software and Integration & Managed Services), Deployment Mode, Organization Size, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Digital Identity & eSIM Market is accounted for $74.76 billion in 2025 and is expected to reach $189.37 billion by 2032 growing at a CAGR of 14.2% during the forecast period. Digital Identity and eSIM solutions collectively transform how people authenticate themselves, connect devices, and engage with digital services. A digital identity provides verified, paperless access to sectors such as finance, public administration, travel, and healthcare, strengthening trust and reducing manual verification hurdles. Meanwhile, eSIM technology embeds a remotely programmable SIM directly into devices, enabling instant network activation, simplified carrier switching, and support for multiple connectivity profiles. When combined, these innovations create smoother onboarding, higher security, and more consistent user experiences across devices and platforms. They also accelerate IoT expansion, limit identity-related fraud, and streamline digital interactions for both consumers and businesses.

According to Okta data, more than 30% of Indian users log into 10+ personal online accounts monthly, showing rapid adoption of digital identity technologies and readiness for biometrics and AI-driven authentication.

Market Dynamics:

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Driver:

Rising demand for secure and seamless authentication

Growing dependence on digital interactions has made secure and smooth authentication a central force behind the Digital Identity & eSIM market. With rising online transactions, organizations require stronger verification tools to combat identity theft, meet compliance rules, and safeguard sensitive data. Modern digital identity systems offer features like biometrics, multi-level authentication, and protected credential management to enhance trust and reduce vulnerabilities. eSIM technology further strengthens this environment by enabling secure, remotely managed network activation and device validation. Together, they create a highly reliable authentication framework that benefits individuals, enterprises, and regulators. As digital trust becomes essential, adoption continues to expand across diverse application areas.

Restraint:

Data privacy concerns and security risks

Data protection issues and cybersecurity threats represent major obstacles for the Digital Identity & eSIM market. Storing identity information digitally introduces exposure to hacking, credential theft, and unauthorized surveillance, reducing user confidence in adopting such solutions. Strict global and regional regulations further increase compliance obligations for companies managing personal identity records. eSIM remote provisioning also demands strong encryption and secure server environments to prevent unauthorized duplication or interception of network profiles. Even minor security incidents can damage trust and create resistance among industries that rely on high assurance, such as finance and public institutions. These risks slow deployments and restrict broader market expansion.

Opportunity:

Growth of cross-border digital services and global mobility

The rising demand for smooth cross-border interactions creates a major opportunity for the Digital Identity & eSIM market. With more individuals traveling, working remotely, and using international digital services, the need for easy, trusted authentication grows. Digital identity platforms support this by enabling secure, consistent verification across countries and service providers. eSIM technology further enhances global mobility

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through instant network activation, simplified roaming, and remote profile management. These capabilities help deliver unified experiences for consumers and enterprises operating internationally. As industries move toward global service models and users expect uninterrupted digital access worldwide, adoption of integrated digital identity and eSIM solutions is set to accelerate.

Threat:

Rising sophistication of cyberattacks and identity fraud

Growing cyber threats and rapidly evolving identity fraud methods present a significant challenge for the Digital Identity & eSIM market. With sensitive identity data increasingly held online, criminals target authentication platforms, biometric databases, and eSIM-related systems. New techniques such as AI-generated deepfake identities, intelligent phishing attacks, and attempts to exploit network profile provisioning expose vulnerabilities within digital identity ecosystems. eSIM servers and over-the-air updates can also be compromised if not securely managed, enabling unauthorized access or fraudulent profile activation. These risks weaken user trust, raise compliance concerns, and could trigger major disruptions in high-security sectors. Such incidents may ultimately slow market adoption and investment confidence.

Covid-19 Impact:

The COVID-19 pandemic reshaped the Digital Identity & eSIM market by pushing organizations toward digital-first operations and minimizing physical contact. Remote work, telemedicine, online banking, and virtual services created strong demand for reliable digital identity verification and secure remote access. eSIM technology benefited as users required easy, contactless activation and uninterrupted connectivity without visiting retail outlets. The crisis emphasized the need for robust identity protection, prompting greater investment in authentication tools, encryption systems, and mobile connectivity platforms. These changes accelerated digital transformation across industries and increased long-term adoption of integrated digital identity and eSIM solutions, strengthening the overall market trajectory.

The connectivity & lifecycle management software segment is expected to be the largest during the forecast period

The connectivity & lifecycle management software segment is expected to account for the largest market share during the forecast period. This dominance arises because the

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growth of eSIMs depends on tools for remote activation, managing multiple subscription profiles, and secure over-the-air updates, which are fundamentally software-driven. Industry data shows that connectivity-service segments—including eSIM provisioning, profile maintenance and lifecycle functionality—constitute the largest share of the market. Organizations such as mobile operators, IoT device makers, and enterprises favor these platforms for their ability to offer secure, scalable connectivity and simplified operations without relying on physical SIM logistics.

The cloud-native segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the cloud-native segment is predicted to witness the highest growth rate. As businesses modernize their architecture, they are shifting to cloud identity platforms that offer elasticity, API access, and lower infrastructure burden. According to market forecasts, cloud deployments are expanding more quickly than hybrid or on-premises alternatives. This surge is driven by increasing adoption of remote authentication, digital onboarding, and identity-as-a-service models, which provide scalable, secure, and cost-effective identity management without heavy on-site investment.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share. Its lead comes from a highly developed telecommunications landscape, rapid 5G rollout, and widespread adoption of eSIM-capable devices. Key players such as Apple, Samsung, and major carriers strongly endorse eSIM adoption. In addition, demand for digital identity services is high in sectors like fintech, enterprise tech, and IoT, driven by regulatory needs and security. This digitally advanced region plays a pivotal role in global revenues and sets the pace for innovation in identity management and connectivity provisioning.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Key drivers include widespread digital adoption, a booming smartphone and IoT device base, and heavy investment in 5G networks within major markets such as China, India, Japan, and South Korea. Forecasts suggest that this region’s forward-looking regulatory landscape, growing use of connected services, and demand for remote onboarding and identity solutions are accelerating uptake of both identity platforms and

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eSIM technology. As a result, APAC stands out as the most rapidly expanding region in this combined market.

Key players in the market

Some of the key players in Digital Identity & eSIM Market include Thales Group, IDEMIA, Giesecke+Devrient GmbH, Infineon Technologies AG, STMicroelectronics, Valid S.A., Kigen, Apple Inc., Samsung Electronics Co., Qualcomm Technologies Inc., NXP Semiconductors, Vodafone Group Plc, Sierra Wireless, Deutsche Telekom AG and NEC Corporation.

Key Developments:

In October 2025, Infineon Technologies AG has concluded Power Purchase Agreements with PNE AG and Statkraft for green electricity. Over the next ten years, Infineon will purchase green electricity from PNE AG's Schlenzer and Kittlitz III wind farms in Brandenburg in Germany. Infineon aims to switch its global operations to 100% green electricity in the current year and become CO2-neutral for Scope 1 and 2 emissions by 2030.

In January 2025, IDEMIA has been awarded a 10-year blanket purchase agreement (BPA) worth up to $194.5 million from the General Services Administration (GSA) for its identity proofing capabilities. IDEMIA is one of 8 technology providers selected by GSA to accelerate the deployment of next-generation identity proofing technologies for Login.gov, a secure sign-in platform used by the public to create a single digital account that can be used to access multiple federal, state and local government agency sites.

In September 2024, Thales and WB Group Sign a Frame Agreement on Strategic Cooperation in the Defence Sector. Under the terms of a Memorandum of Understanding, the purpose of the agreement is to establish a structure to manage the relationship between the two parties, based on mutually agreed principles governing the exploration of business opportunities across business units, with the ultimate goal to benefit the parties' customers.

Components Covered:

- eSIM Hardware
- Identity Software Platforms

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Connectivity & Lifecycle Management Software

Integration & Managed Services

Deployment Modes Covered:

Cloud-Native

Hybrid

On-Premises

Organization Sizes Covered:

Micro & Small Enterprises

Mid-Market Enterprises

Large Enterprises

Applications Covered:

Digital Identity Lifecycle Management

Authentication & Access Control

Digital Signature & Consent Management

eSIM Provisioning & Remote Profile Activation

Subscription & Connectivity Management

Secure Device Onboarding

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End Users Covered:

- Mobile Network Operators (MNOs) & MVNOs
- OEMs & Device Manufacturers
- Government & Public Sector
- Banking, Financial Services & Insurance (BFSI)
- Healthcare & Life Sciences
- Retail, eCommerce & Digital Platforms
- Automotive & Connected Mobility
- Industrial IoT & Smart Manufacturing
- Energy, Utilities & Smart Grid
- Logistics, Fleet & Asset Tracking

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK

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- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE

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Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical

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presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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