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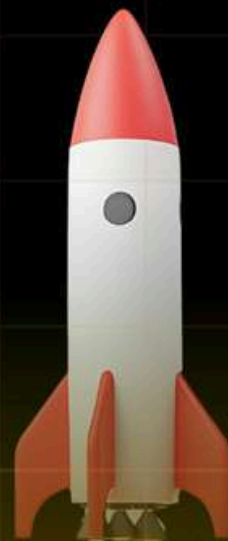
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PROLOGUE

Dear valued colleague and reader,

The telecommunications industry never stands still. Technologies that once seemed like the next big thing quickly become part of everyday infrastructure, while new developments open entirely different possibilities for how people, devices and businesses connect. eSIM is one of those technologies. What began as a new approach to digital subscriber identity has evolved into a much broader platform for connectivity, device management, intelligent network access and new digital business models.

In 2025, Telco Academy brought the industry together for its Roaming & eSIM Marathon, exploring two closely connected areas that were rapidly reshaping global mobile connectivity. One year later, the conversation has moved forward. The evolution of eSIM has accelerated, its applications have expanded, and the technology is increasingly reaching beyond the traditional consumer smartphone. For this reason, eSIM Marathon 2026 focuses entirely on eSIM, creating space to examine where the technology is heading and how it is changing the telecom ecosystem.

Across three days, industry experts and technology leaders explored eSIM from different angles, moving from travel connectivity and new MNO revenue opportunities to IoT deployments, lifecycle management, intelligent connectivity and the orchestration of increasingly complex ecosystems. The sessions brought together practical experience, technical perspectives and commercial insights, offering a broader view of an industry moving from simply enabling connectivity towards making connectivity more flexible, intelligent and accessible.

This whitepaper captures the key insights from those sessions, including:

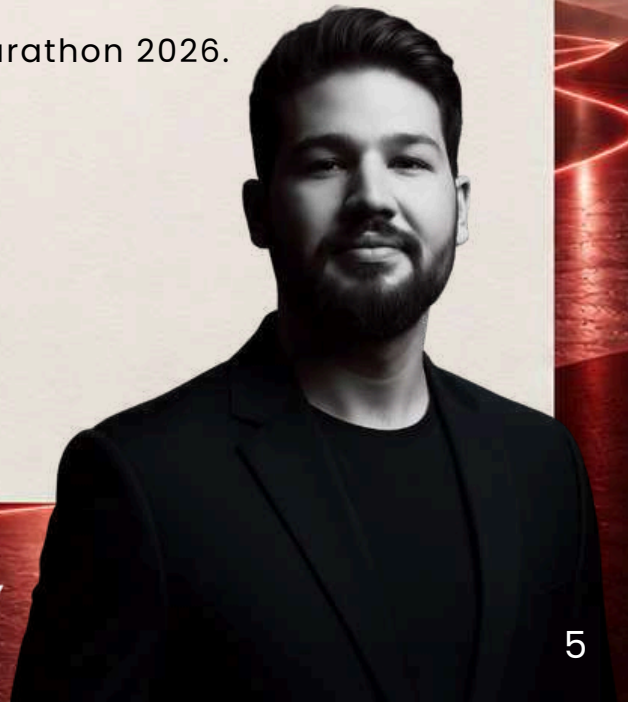
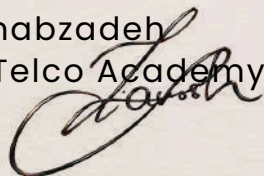
- The Evolution of the eSIM presented by Roger Dewey from **Able Device**
- From Consumer eSIM to IoT eSIM presented by Constantin Nechita from **Simartis**
- Orchestrating the eSIM Ecosystem presented by Alejandro Pulido from **Valid**
- From Roaming to Intelligent Connectivity presented by Sara Yaghoubi from **Monty eSIM Hub**
- Travel eSIM After the Hype presented by Özge Karaman from **Best Connect**
- Travel eSIM: Seamless Add-on for MNOs presented by Maria Roussou from **TI Sparkle**
- How eSIM is Powering the Future of Travel Tech presented by Haider Mustafa from **Xylen Management**

Each session offered more than a presentation. It provided an opportunity to hear directly from professionals working with these technologies, understand the challenges they encounter in real deployments, and explore the opportunities emerging as eSIM continues to develop.

The discussions throughout this Marathon made one thing particularly clear: eSIM is no longer simply about replacing a physical SIM card. It is becoming part of a much larger transformation in how connectivity is provisioned, managed, monetized and experienced. We hope this whitepaper gives you a valuable perspective on that transformation and, perhaps, raises a few new questions of your own.

Enjoy the journey, and welcome to eSIM Marathon 2026.

Sincerely,
Siavosh Vahabzadeh
Director of Telco Academy



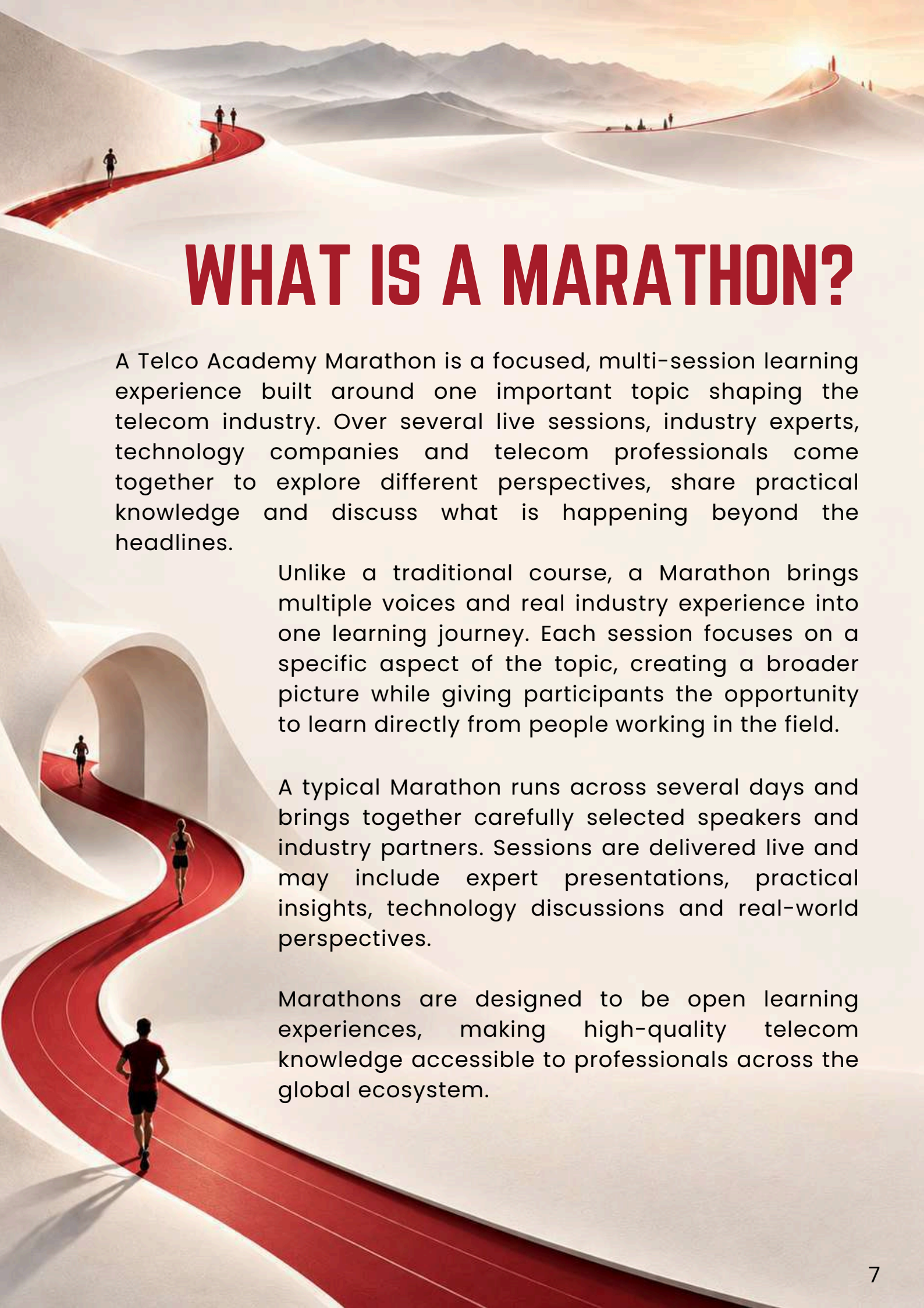
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WHAT IS A MARATHON?

A Telco Academy Marathon is a focused, multi-session learning experience built around one important topic shaping the telecom industry. Over several live sessions, industry experts, technology companies and telecom professionals come together to explore different perspectives, share practical knowledge and discuss what is happening beyond the headlines.

Unlike a traditional course, a Marathon brings multiple voices and real industry experience into one learning journey. Each session focuses on a specific aspect of the topic, creating a broader picture while giving participants the opportunity to learn directly from people working in the field.

A typical Marathon runs across several days and brings together carefully selected speakers and industry partners. Sessions are delivered live and may include expert presentations, practical insights, technology discussions and real-world perspectives.

Marathons are designed to be open learning experiences, making high-quality telecom knowledge accessible to professionals across the global ecosystem.

WHAT IS KNOWLEDGELAB?

Knowledge Lab is Telco Academy's year-round initiative for open learning experiences, bringing the global telecom community together through marathons, workshops, discussion panels and other live learning formats.

Created around one simple idea, Where Telecom Learns Together, Knowledge Lab makes industry knowledge more accessible by connecting professionals with experts, technology leaders and peers. It is a space to explore new technologies, challenge ideas, share practical experience and stay ahead of a telecom industry that never stops evolving.

In 2026, Knowledge Lab is proudly sponsored by mCore, supporting a growing program of open, high-quality learning experiences designed to connect people, knowledge and the technologies shaping the future of telecom.





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THE EVOLUTION OF THE eSIM



FROM
IDENTITY TO
INTELLIGENT
CONNECTIVITY

PRESENTER

ROGER DEWEY

CEO and Founder of Able
Device

PRESENTED BY



INTRODUCTION

The eSIM Marathon's sessions reframed one of the most familiar components in mobile telecommunications. Roger Dewey, Founder and CEO of AbleDevice, argued that the SIM, long treated as nothing more than the chip that authenticates a device on a network, is in fact an underused, standards-based processor capable of observing, deciding, and acting at the device level. His talk traced the SIM's thirty-year evolution, introduced a concept he calls connectivity intelligence, and walked through three real deployments that put the idea into practice.

THE COMPANY: ABLE DEVICE

AbleDevice builds applications that run directly on the SIM, using capabilities defined in the 3GPP SIM Toolkit standard. Everything the company does is standards-compliant rather than proprietary, and its applets have been certified on multiple tier-one operator networks around the world, shipping in the millions. The company came to the SIM from an unusual direction: rather than from the SIM-card industry itself, its origins are in embedded cellular modules, which Dewey credits for its willingness to ask what the SIM could do beyond authentication. Its applet product is called SIMBae.

THE PRESENTER

Roger Dewey is an IoT and enterprise mobile application executive and the founder and CEO of AbleDevice. He has worked in mobile telecommunications since 1996, when he contributed to an early SMSC project with Ericsson, and previously led marketing and sales for embedded modules at Sony Ericsson. That module background, he explained, is what led him to look at the SIM as a place to move processing and cut cost, at a time when the prevailing view was that a SIM could not do such a thing.

A STANDARDS-BASED PROCESSOR, HIDING IN PLAIN SIGHT

Dewey's central premise is that the SIM is the only component in a mobile device with standardised inputs and outputs, and one that is both forward and backward compatible across generations. It is, in his description, a small processor that can act on information if it is programmed correctly. AbleDevice's work sits inside the standard: as he put it, the standard does not say you must do these things, but it also does not say you cannot.

He was careful to describe the boundaries accurately. The SIM cannot reach directly into a device's operating system or modem. It communicates through the standard SIM Toolkit to the baseband, which acts as a trusted intermediary and returns only the information it has been designed to expose. That means the depth of what is possible depends heavily on how fully the baseband developer has implemented the SIM Toolkit, and Dewey's recurring frustration was that most implement only the basics required for ordinary consumer handset functionality, leaving much of the standard unused.

FROM IDENTITY TO BEHAVIOUR

Each generation of the SIM, Dewey argued, solved the industry's biggest problem of its moment: first identity and authentication, then remote provisioning and lifecycle management. The industry has now reached another inflection point. Most enterprises no longer struggle to connect devices; they struggle to ensure those devices behave correctly once connected.

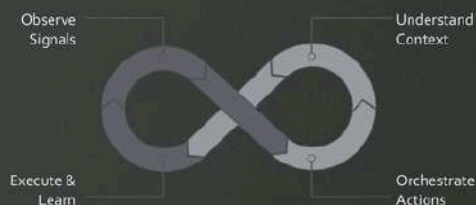
That distinction, connectivity versus behaviour, ran through the whole session. A device can have signal and still fail to do its job, because it is attached to the wrong network for the task, or roaming on a partner with only a voice agreement, or camped on a signal it will not leave until it drops entirely. These, Dewey said, are behavioural problems, not connectivity problems, and solving them requires context-aware orchestration, especially across the increasingly complex mix of public, private, roaming, and non-terrestrial networks.

CONNECTIVITY INTELLIGENCE: A CLOSED LOOP

The concept Dewey introduced, connectivity intelligence, is an architectural feedback loop rather than a single feature: observe, understand context, make an intelligent decision, execute deterministically, capture the outcome, and continuously improve. He argued the telecom industry has largely built the first three steps in the cloud, but has been missing two things: real-time telemetry from the device's own perspective, and deterministic enforcement at the device level. His case for the SIM as the place to close that loop rests on a practical observation. Policies have to be executed somewhere, and every other candidate layer is unreliable or fragmented: the cloud is not always connected, operating systems differ across OEMs, applications differ per use case, and modems are proprietary to their vendors. The only standard layer present in every cellular device on a mobile network, in whatever generation, is the SIM. That makes it, in his framing, a universal execution point, capable of enforcing the same enterprise intent consistently regardless of device make, OS, or radio vendor.

Connectivity Intelligence

Intelligence begins with context. Before any autonomous decision can be made, the system must first understand the full operational environment surrounding the device — signal quality, location, network availability, policy, and history all feed a continuous decision loop.



Examples of Contextual Inputs

Signal quality & RSRP

GPS & device movement

Wi-Fi presence & strength

Network rejection causes

Data availability confirmation

Private network visibility

Previous network failures

Enterprise policy state

USE CASE ONE: PAYMENT TERMINALS

AbleDevice's oldest and largest customer runs credit-card transactions over the top of the mobile network, in a roaming environment, using mobile payment terminals in settings like taxis and outdoor restaurants where devices constantly move between networks and radio conditions. The terminals were connecting successfully, but transaction performance was inconsistent, sometimes because the device had attached to the top network on its preferred roaming list even though that network was not the best for reliable data.

The SIM applet AbleDevice deployed continuously observes what the device is experiencing against a configurable signal-strength threshold. If the connection falls below it, the applet hunts for a network that meets the threshold, then performs a data check by pinging a server to confirm data is actually working before settling. The customer ships the SIM to end users regardless of device make, model, OS, or generation. Dewey reported the business outcomes as higher transaction success rates, fewer support calls, and better experiences for merchant and customer alike. This, he noted, was the beginning of what the company now calls contextual-aware orchestration, though at the time they simply called it always-best-connected.

USE CASE TWO: PUBLIC-TO-PRIVATE NETWORK SWITCHING

A second deployment came at the request of large mobile network operators facing a gap in the standard: there is no standard trigger to move a device from a public network to a private one. Enterprises invest in private networks for security, lower latency, and control, but that investment only pays off if devices reliably return to the private network whenever it is available, and IoT devices such as trucks have no user interface through which to make that choice manually.

Running on the SIM, the applet observes contextual signals, GPS location or Wi-Fi identifiers where available, and forces the baseband to switch to the private network when the device is in the right place. AbleDevice can go further by mapping the public cell sites adjacent to a private network, so that when the applet detects attachment to one of those sites, even at full signal, it begins seeking the private network and forces the switch, and prevents the device returning to public unless specific conditions require it. Because the decision executes at the SIM layer, it does not depend on the operating system, application, or cloud connectivity. Dewey noted growing uptake of this use case among government, security, and first-responder customers.

USE CASE THREE: CONNECTED-VEHICLE TRUST

The third deployment, which Dewey described as a curve ball, involved a next-generation electric-vehicle manufacturer whose challenge was not connectivity but trust. As vehicles became software-defined, the manufacturer needed to securely manage the keys and certificates governing access to critical subsystems, including through the physical maintenance port. Their initial approach, a proprietary security chip in the vehicle's CPU, had failed in a way that bricked the vehicle's computer.

Recognising that the eUICC already in the vehicle is itself a secure element, equivalent to a proprietary security chip, AbleDevice provided a path to use it as the key store. Access keys are tied to the vehicle identification number, so a technician entering the VIN at the maintenance port receives the keys and certificates needed to update subsystem firmware. Crucially, because it uses standard SIM over-the-air management, the keys and certificates can be updated or repaired remotely, something the proprietary chip could not do. Dewey reported the result as a scalable root of trust that reduces hardware complexity and reuses an eUICC the manufacturer had already paid for.

Connected Vehicle Trust

The Challenge: Trust. In connected vehicle architectures, the eSIM becomes the root of trust — not just for connectivity, but for secure credential delivery, certificate lifecycle management, and ongoing OTA governance.



Trusted Identity Layer
Hardware-anchored identity across the fleet

Secure OTA Lifecycle
Certificate renewal and revocation without physical access

Lower BOM & Operational Lifecycle
eSIM consolidates previously separate security modules

WHY THE SIM'S PERSPECTIVE MATTERS

Underpinning all three cases is an argument about observation. When connectivity fails, the first instinct is to blame the network, but the network often reports that everything is working while the device experiences something very different: weak signal at its exact location, failed data sessions, poor application performance, inconsistent roaming. Some of the most important connectivity issues, Dewey argued, are only visible from the device itself.

This is also where his view of AI sits. The industry tends to start the conversation with models, agents, and predictive analytics, but all of them depend on the quality of the information they are given. For years, he argued, the industry optimised the models and neglected the context. A well-designed SIM applet contributes telemetry from the exact point where connectivity is experienced, which means AI receives not merely more data but better data. In his words, the future advantage will belong not to the organisations with the biggest AI models, but to those with the richest contextual intelligence.

HOW SIMBAE WORKS

Dewey described AbleDevice's implementation, SIMBae, by analogy to a spreadsheet. Rather than being purpose-built per deployment, it ships with the full set of 50 to 60 features as a Java Card state machine, and is configured for a specific use case through a script written in Python, much as a spreadsheet ships with every function and the user writes a formula. Because the script compiles to roughly a 1KB configuration file, behaviour can be changed with a very short data burst rather than rewriting and re-deploying an entire applet.

In a live example drawn from a current customer, devices roaming into Brussels South were repeatedly attaching to the first network on the preferred roaming list, falling below the signal threshold, and being switched autonomously by SIMBae to a better network. The applet reported the pattern back to an AI engine, which recognised it and rewrote the script so that devices entering that area would connect directly to the better network in the first place, then pushed the update to devices in the field. This is the closed loop in practice: autonomous execution on the device, observation sent back, analysis, and an improved configuration returned.

Q&A HIGHLIGHTS

Is eUICC storage space a limiting factor?

Dewey acknowledged this is one of the first questions customers raise. An early proof of concept ran in 12KB on a 64KB 2G SIM. The full-featured SIMBae now requires around 65KB, but the smallest SIMs today are 128KB, and the eUICCs increasingly common, often around 2MB, leave ample room, particularly for automotive and similar deployments.

Is the applet independent of the SIM's operating system and vendor?

Yes. AbleDevice deploys across SIMs from multiple vendors and operators and deliberately keeps the applet portable and independent of any particular operating system, so customers are not locked to a single SIM vendor or operator. Its philosophy, Dewey said, is to serve the enterprise.

Is the applet pre-installed or can it be installed later?

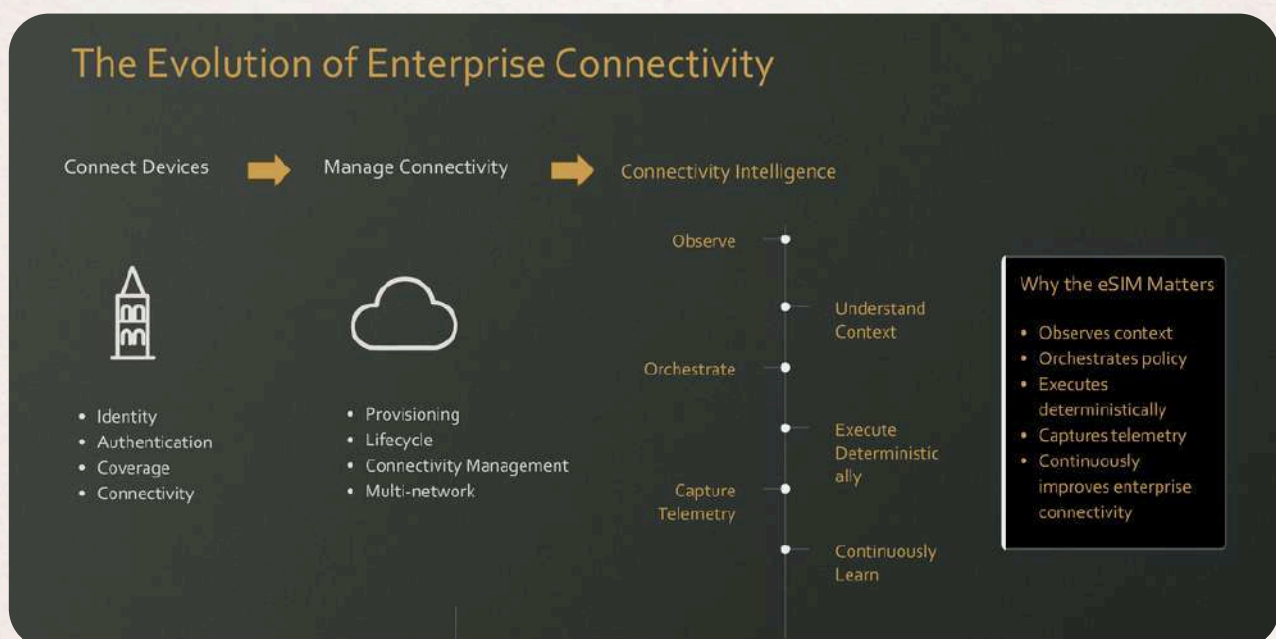
Both. AbleDevice has performed over-the-air installation to a thousand electric vehicles already in the field, though that carries a lot of data. For production, it typically acts as custodian, providing the applet to the customer's SIM supplier to embed on SIMs for licensed customers, while doing its own testing locally on SIM-card readers.

What is the business model, and who receives the value?

AbleDevice sells a licence per SIM, valid for the lifetime of that SIM, through MNOs, MVNOs, and directly to large enterprises operating across multiple operators. It does not provide cloud services or pull back data itself; it assumes the customer routes telemetry to their own platform for analysis. As Dewey put it, the company stays in its lane as SIM-applet specialists, while the applet can run fully autonomously, send data back for updates, or operate in a client-server model, depending on how the customer wants to deploy it.

CONCLUSION

AbleDevice's message was that the next evolution of the SIM will be architectural rather than another standards milestone. For thirty years the SIM answered a single question, who is this device. Dewey argued that for the coming decade it will increasingly be used to control how devices behave, becoming the trusted point where observation, contextual awareness, and deterministic execution meet across every kind of network. His repeated invitation, unusually, was for more of the industry, including competitors, to use these capabilities, because in his view the real obstacle is not competition but the fact that too few realise what the SIM can already do, and that too few basebands yet implement the full SIM Toolkit that would let it do more.



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CONSTANTIN NECHITA

Product Director at Simartis

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INTRODUCTION

Consumer eSIM was designed around a person holding a device. Somebody scans a QR code, chooses a plan, taps to switch. SGP.32, the GSMA's eSIM IoT standard, is built for the opposite case: fleets with no screen, no camera and nobody standing beside them, expected to run for years. Constantin Nechita walked through what the standard changes, the two components it introduces, the two routes by which a profile reaches a device, and the six use cases that justify the specification, before setting out how Simartis has built its eIM on top of its existing consumer eSIM and OTA platform rather than beside it.

THE COMPANY: SIMARTIS

Simartis is a software company established in the European Union, with more than 20 years of experience developing SIM, eSIM, OTA and device management technologies for connectivity providers. It has delivered over 100 deployments across five continents, on premise and hosted, and has remotely managed more than a billion SIM cards. The company develops and maintains its core software in-house and retains ownership of its intellectual property. Its portfolio covers three connected areas: consumer eSIM, which now includes eSIM IoT, OTA SIM management for the content and lifecycle of the subscription, and device management for automatic device configuration at SIM activation. Simartis operates its own GSMA-certified environment in the EU, has held GSMA certification for around five years, and is a GSMA Industry Member and SAS Accredited Supplier, certified to ISO 27001, 9001, 45001 and 14001.

THE PRESENTER

Constantin Nechita is Product Director at Simartis, with more than 20 years in telecoms and connectivity. His account of the standard was practical rather than promotional, drawing repeatedly on what the specification permits, what device vendors have actually implemented, and where commercial reality diverges from the technical one.

WHAT ACTUALLY CHANGES FROM CONSUMER TO IoT

Nechita framed the shift as three models changing at once. Activation moves from an LPA, a QR code and an activation code to an IPA trigger. Connectivity moves from Wi-Fi or ordinary mobile data to bootstrap mobile data. Lifecycle moves from end-user local actions to remote profile state operations.

The reason is the device. Many IoT devices are headless, with no screen, no camera, no keyboard and nobody available to help. Profiles go into meters, vehicles, industrial machines and other infrastructure assets, and they are long-lived, expected to operate for many years. In loose terms, he described the consumer LPA as having been split: part of its local role is inherited by the IPA on the device, and the remote orchestration role taken up by the eIM. What SGP.32 does not do is start over. As his slide put it, the standard keeps the SM-DP+ profile delivery foundation and adds a remote-control layer on top.

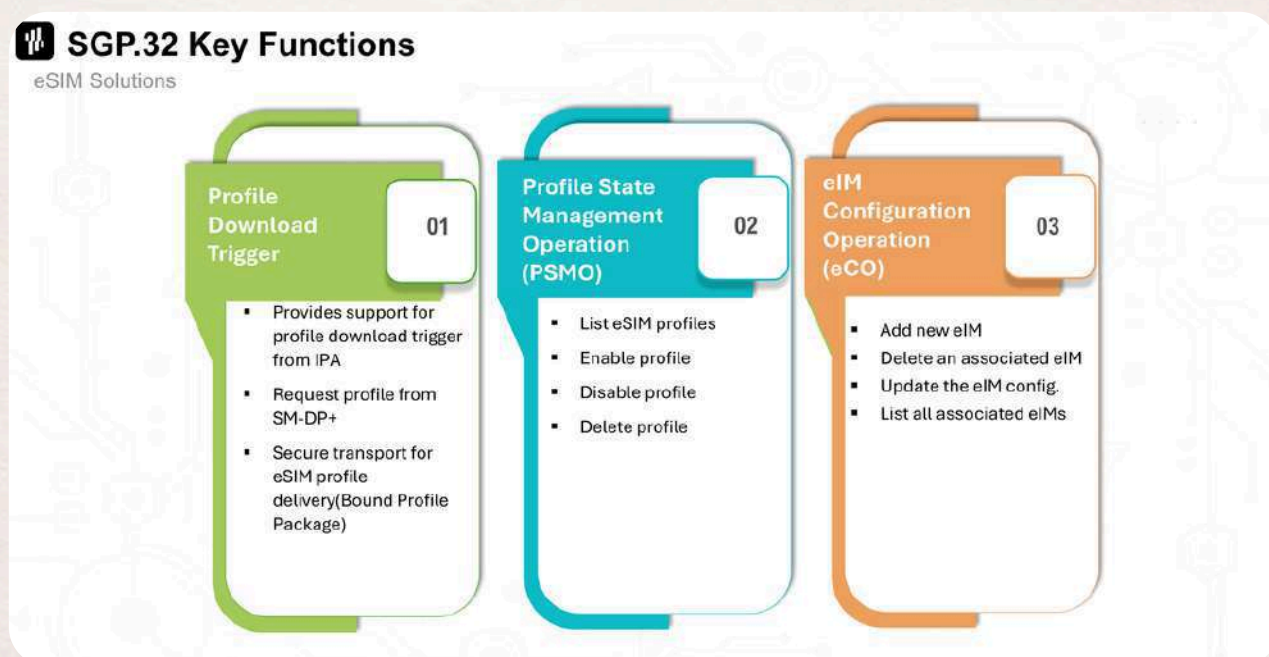
THE TWO NEW COMPONENTS

The eIM decides and orchestrates. The IPA communicates and executes. The eIM is the server-side control plane: it orchestrates profile download triggers, manages the profile state operations that were local actions in the consumer model, and handles its own configuration, with the architecture allowing multiple eIMs and multiple SM-DP+s to be connected for flexibility and reliability. The IPA is the execution point next to the eUICC, connecting to the eIM through ESipa and ESep, executing eUICC package and profile operations, and reporting back results, notifications and capabilities.

It communicates over whichever protocol the device supports, including HTTPS, CoAP and LWM2M. Some are specified directly in SGP.32, but the standard leaves room for others by defining an underlying communication protocol generically, so new device types can be onboarded without a new specification. The split matters because of scale: a single operator may need to change thousands or millions of devices with no local access to any of them.

THE THREE FUNCTION GROUPS

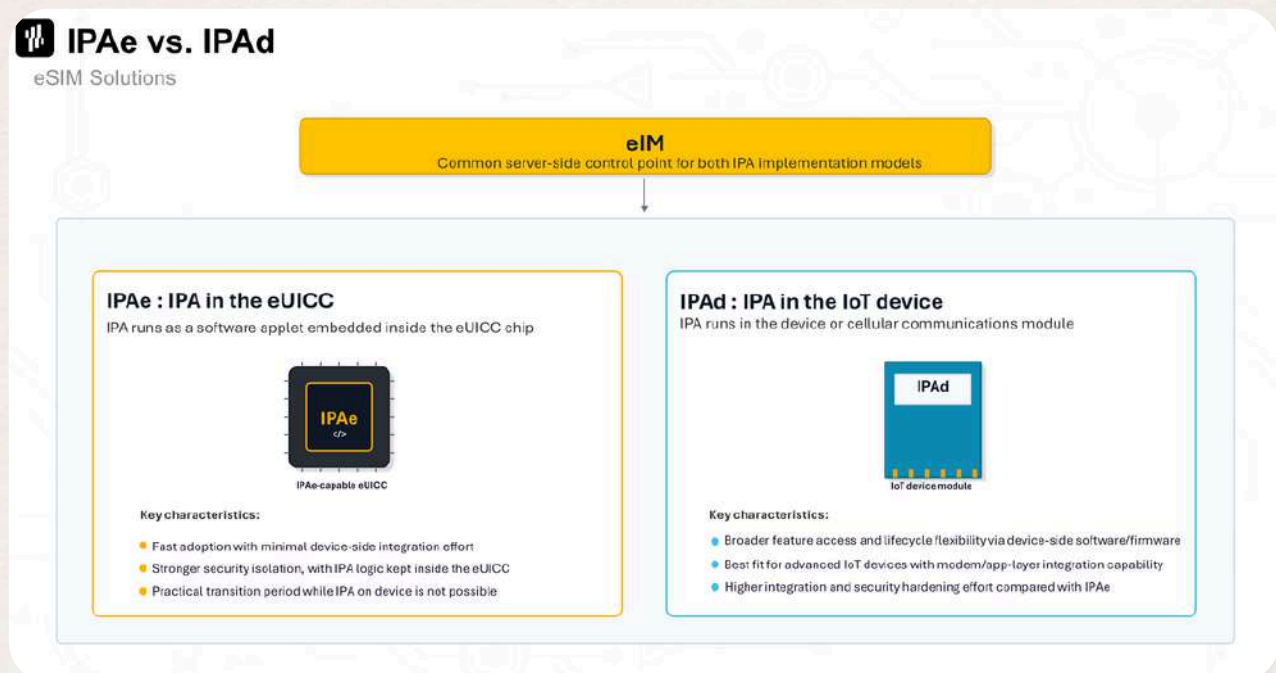
- **Profile download trigger:** support for a download trigger raised by the IPA, the request for the profile from the SM-DP+, and secure transport of the bound profile package to the device.
- **Profile state management operations:** listing the eSIM profiles on the device and remotely enabling, disabling or deleting them. This is the change that matters most, turning a one-time provisioning event into a lifecycle that can be managed remotely.
- **eIM configuration operations:** the administrative group. Adding a new eIM, deleting an associated one, updating an eIM configuration, and listing all eIMs associated with the eUICC.



WHERE THE IPA LIVES

The eIM is the common server-side control point for both models, but the IPA itself can sit in one of two places. The IPAe runs as a software applet embedded inside the eUICC chip, arriving with it from the factory. It allows fast adoption with minimal device-side integration effort, keeps the IPA logic inside the secure element for stronger isolation, and gives a practical transition path while an IPA on the device is not yet possible.

The IPAd runs in the device or the cellular communications module instead. It offers broader feature access and lifecycle flexibility through device-side software, and fits advanced devices with modem and application-layer integration capability, at the cost of higher integration and security hardening effort. Nechita was careful with the security point: the IPAd is not inherently less secure, but it demands more investment to make secure, because device firmware is exposed to more components and interfaces than a secure element, and the design-to-production lifecycle of an IoT module commonly runs one to two years. IP Ae implementations currently predominate. The strength of the architecture is that the choice need not be made once and for all, since a single deployment can address both.



TWO WAYS A PROFILE REACHES THE DEVICE

Both flows begin the same way. The operator orders profiles in the SM-DP+, where a profile and activation code become available in inventory, and the eIM links that profile to the target device by EID. A trigger then initiates the download, and may come from device logic such as a restart or periodic polling.

In the direct, device-led flow, the IPA contacts the SM-DP+ itself, which prepares the bound profile package; the profile is delivered to the IPA, installed on the eUICC and optionally auto-enabled. This assumes a device capable of that connection, and it assumes bootstrap connectivity: the device needs an initial data path before the IPA can reach anything at all.

In the indirect, eIM-assisted flow, the eIM retrieves the bound profile package from the SM-DP+ and forwards it to the IPA over ESipa, so no direct connection between device and SM-DP+ is required. It is designed for lower-capability devices and is the more complex model to implement in the eIM.

Security is identical either way. The profile stays cryptographically protected end to end, and the eIM acts as orchestration and transport without access to the content it carries. The two are complementary models chosen on device capability, network constraints and deployment architecture.

SGP.32 New Components

eSIM Solutions

SGP.32 keeps the SM-DP+ profile delivery foundation and adds a remote-control layer.

Added by SGP.32



eIM

Remote IoT control plane
Server-side orchestration component
for SGP.32 operations

- 1 Profile download trigger & orchestration
- 2 PSMO lifecycle: enable / disable / delete
- 3 eCO configuration, events & operation tracking

IPA

IoT Device-side execution
Runs as IPAd in the device or IPAs
inside the eUICC

- 1 Connects to eIM through ESipa / ESep
- 2 Executes eUICC package & profile operations
- 3 Reports results, notifications & capabilities

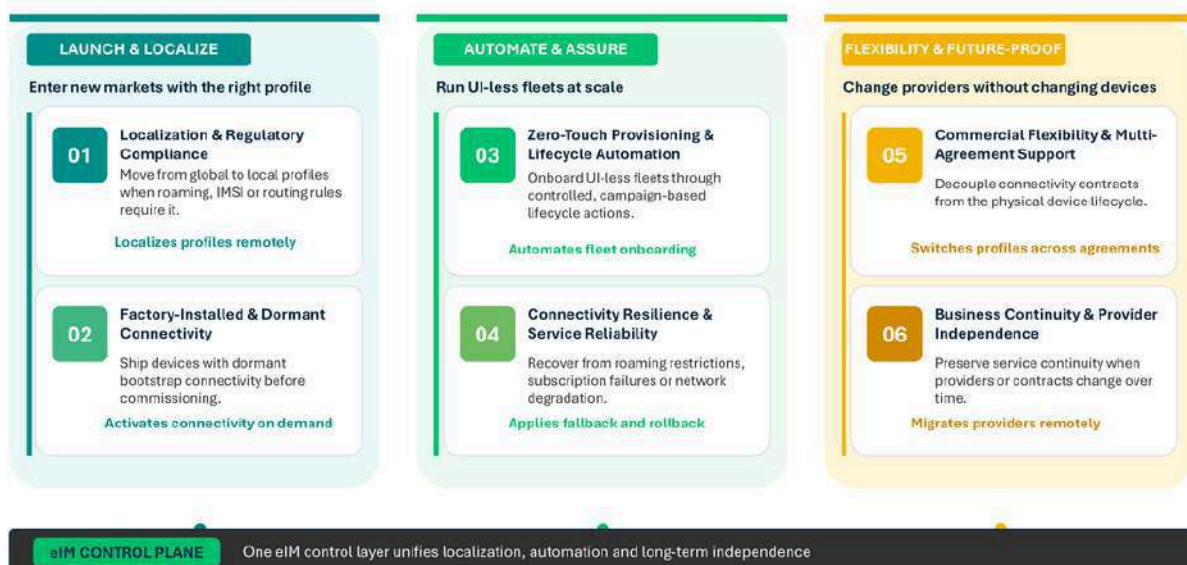
SIX USE CASES

- **Localization and regulatory compliance.** Move from a global profile to a local one when roaming rules, IMSI or routing require it. Permanent roaming restrictions typically limit registration without a local subscription to between 90 and 180 days, and localizing also cuts cost and improves coverage.

- **Factory-installed and dormant connectivity.** Ship devices with dormant bootstrap connectivity and commission them later. For OEMs this supports a single global SKU: the operator profile is decided after shipment rather than built into a manufacturing variant.
- **Zero-touch provisioning and lifecycle automation.** Onboard fleets with no user interface through controlled, campaign-based actions, removing the need to send technicians into the field.
- **Connectivity resilience and service reliability.** Recover from roaming restrictions, subscription failures or network degradation through fallback and rollback: if the active profile cannot register, the IPA returns to the previously enabled one, and a newly installed profile that fails to authenticate rolls back automatically.
- **Commercial flexibility and multi-agreement support.** Decouple the connectivity contract from the physical device lifecycle, sourcing profiles from multiple SM-DP+s and, in principle, running multiple eIMs in parallel.
- **Business continuity and provider independence.** Preserve service continuity when providers or contracts change, migrating remotely rather than touching hardware. Nechita attached an honest caveat: what the standard permits technically may still be restricted by an existing supplier contract.

SGP.32 Key Use Cases

eSIM Solutions



THE SIMARTIS POSITION

Simartis presents its eSIM IoT proposition as an extension of proven consumer eSIM and OTA capability rather than a new product line, resting on five points.

- A proven OTA platform for at-scale IoT deployments, supporting high-volume use cases including global connectivity optimisation and multi-IMSI management for software-defined vehicles.
- OTA delivery over HTTPS for constrained environments, using an end-to-end channel with a server and polling applet to reach data-only, SMS-less devices such as NB-IoT.
- Built-in web interfaces and API libraries, giving operational control and automation in parallel through REST APIs.
- Its own applet stack covering HTTPS polling, SIM refresh and multi-IMSI, either pre-loaded into eSIMs or deployed later and fully manageable over the air.
- A GSMA consumer-certified SGP.22 foundation, in-house research and infrastructure, which the company presents as a fast path to certified SGP.32 readiness rather than as certification already held.



Simartis Value Proposition in the eSIM IoT Space

eSIM Solutions

Simartis: Trusted Partner. Solid Foundation. Scalable, Secure Next-Gen IoT Connectivity

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OTA	01	Proven OTA Platform for At-scale IoT Deployments	Support for critical and high-volume IoT connectivity use cases, including global connectivity optimization and Multi-IMSI management for software-defined vehicles.
HTTPS	02	OTA Delivery over HTTPS for Constrained IoT Environments	End-to-end HTTPS channel with server and polling applet, addressing data-only and SMS-less IoT devices such as NB-IoT.
API	03	Built-in Web Interfaces & API Libraries	Turnkey web interfaces and developer-friendly REST APIs for intuitive operation, automation and seamless integration.
SIM	04	Expertise in Java Card Applets & eSIM Profiles	Own applet stack: HTTPS Polling, SIM Refresh and Multi-IMSI, either pre-loaded into eSIMs or deployed later and fully manageable via OTA.
GSMA	05	GSMA Consumer-certified Foundation & SGP.32 eSIM Readiness	Leverages Simartis SGP.22 Consumer-certified foundation, in-house R&D, IPR and infrastructure to support a fast path to certified SGP.32 readiness.

Positioned to extend proven Consumer eSIM and OTA capabilities into secure, scalable IoT eSIM lifecycle management.

INSIDE THE SIMARTIS eIM

The Simartis eIM is the IoT remote management layer of the company's eSIM VSM platform. It is aligned to SGP.32, pre-integrated with the GSMA-certified Simartis SM-DP+ for profile sourcing, supports both download flows, and covers the full lifecycle: download, enable, disable, delete, device association and event visibility. Its feature set spans remote provisioning with immediate enablement and profile swapping, multi-protocol support across HTTP(S), CoAP(S) and LwM2M, multi-network support across 4G, 5G, LTE-M and NB-IoT, and web-based management of devices and profiles in single and bulk operations.

The API architecture is layered. Northbound, operator systems, an API gateway and the VSM360 operator interface connect over REST and JSON secured with mTLS. The service layer holds the eIM API for devices, profiles and scheduling alongside the service core handling inventory, operations and events, connected to the SM-DP+ and SM-DS. Southbound the eIM reaches the IPA_d or IPA_e over ESipa and ESep. Consumer and IoT sit in one operational domain, with profiles sourced from the Simartis SM-DP+ inventory or from external activation codes, so operators are not locked into a single source.

WHY OTA STILL MATTERS AFTER INSTALLATION

The most useful distinction in the session was about boundaries. Once a profile is installed, two lifecycles run in parallel. The SGP.32 remote lifecycle covers profile state operations, eIM configuration, event tracking for results and troubleshooting history, and policy coordination across the fleet. What it does not do is reach inside the profile package itself.

That is the OTA SIM lifecycle, which Nechita presented as a parallel and complementary layer rather than a competing one. It updates the file system, including EF data, SIM service tables and steering parameters, updates multi-IMSI configuration covering IMSI account lists, rules and fallback logic, runs refresh commands, and updates applets including the IPA_e trigger, OTA polling and custom logic. With the right permissions this extends to the IPA's own behaviour, such as adjusting the trigger timer so a device checks in every two days, week or month, depending on whether it moves and how carefully its battery must be conserved.

SESSION DISCUSSION HIGHLIGHTS

Does an operator have to decide at the outset whether to use IPAe or IPAd?

No. The eIM is the common server-side control point for both models, so a single deployment can address IPAe and IPAd devices at once. Backend control is identical, and logic can be built on top to handle each device type according to how its IPA behaves.

If SGP.32 manages the profile lifecycle remotely, is OTA still needed?

Yes, because the two run in parallel at different levels. SGP.32 manages the subscription and the profile's state. OTA reaches inside the installed package to update the file system, multi-IMSI configuration, refresh and applets, and to adjust IPA behaviour such as the trigger timer.

The standard permits multiple eIMs and multiple SM-DP+s. Does that deliver provider independence in practice?

The mechanisms exist, but Nechita was explicit that this is only half the answer. What the standard permits technically may still be limited by an existing supplier contract, and buyers should establish where the commercial boundaries sit rather than assuming the technical ones are the only ones that apply.

CONCLUSION

The session closed on three messages. SGP.32 is an evolution of the consumer eSIM standard rather than a replacement: profile personalisation, the SM-DP+, ordering, download and installation all remain, with new remote capability layered on top. The eIM and the IPA turn eSIM from a user-driven process into a remotely orchestrated lifecycle supporting both pull and push flows. And that shift gives operators, OEMs and IoT service providers real flexibility across the long lifetime of a device, from provisioning through localization to profile migration, and with it long-term service continuity.



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ORCHESTRATING THE **eSIM** ECOSYSTEM



**WHY ARCHITECTURE
ALONE IS NOT
ENOUGH, IN
CONSUMER AND IOT**

PRESENTER
ALEJANDRO PULIDO
eSIM - IoT Business
Development Manager at
Valid S.A.

PRESENTED BY **Valid**

INTRODUCTION

Seven sessions into the Marathon, the architecture diagrams had already been covered. Alejandro Pulido's argument was that those diagrams describe a small part of what actually has to work. The familiar picture of an operator, an SM-DP+ and a phone scanning a QR code is accurate as far as it goes, but the scan is one moment inside a long process touching identity, entitlement, provisioning, network registration and service enablement, each owned by a different system. His session was about the layer above the standard: the device entitlement server that decides what a subscriber may use, and the orchestration layer that coordinates everything else, first in consumer and then in IoT, where the same fragmentation arrives multiplied by fleet size.

THE COMPANY: VALID

Valid works across three areas: identity and digital government, banking and payments, and trusted connectivity, where it supplies connectivity providers, device makers and IoT providers. The company has been in telecoms for 25 years, starting in SIM and moving into eSIM as the technology matured, and describes itself as the fourth largest eSIM vendor worldwide. Its published figures record more than 25 years of secure UICC operating system expertise, over 140 remote SIM provisioning platforms live, more than 200 million eSIM platform events processed globally, over 1,200 customers, more than a billion mobile connections powered, and interoperability validated across more than 300 MNOs. Pulido described the portfolio as end to end: SIMs and eSIMs, the servers around them including the SM-DP+ and the eIM, and now orchestration services.

THE PRESENTER

Alejandro Pulido is Business Development Manager at Valid, specialising in IoT. He opened with an unusual observation for a vendor session: eSIM has been mainstream for roughly a decade and there is still a great deal of confusion about it, which is why he thought sessions like this one earn their place. His own contribution was to describe the complexity sitting behind a technology most people meet as a single tap.

WHERE THE STANDARD STOPS

The simplified SGP.22 picture has the operator owning the subscription, the SM-DP+ preparing it, and the consumer device fetching it, historically by scanning an activation code. Pulido pointed out that the activation code has largely been replaced, often by an operator application that delivers the subscription transparently, and that the diagram was never the whole system in the first place.

Activation is one step in five. Identity validates the user and device. Entitlement authorises the plan and the rights attached to it. Provisioning installs the profile. Registration puts the device on the network, which he called the most important step from the operator's point of view, since the eUICC is a certified secure element hosting the operator's most valuable asset, its network credential. Enablement finally activates the service the customer paid for. Each step crosses different systems and different teams.

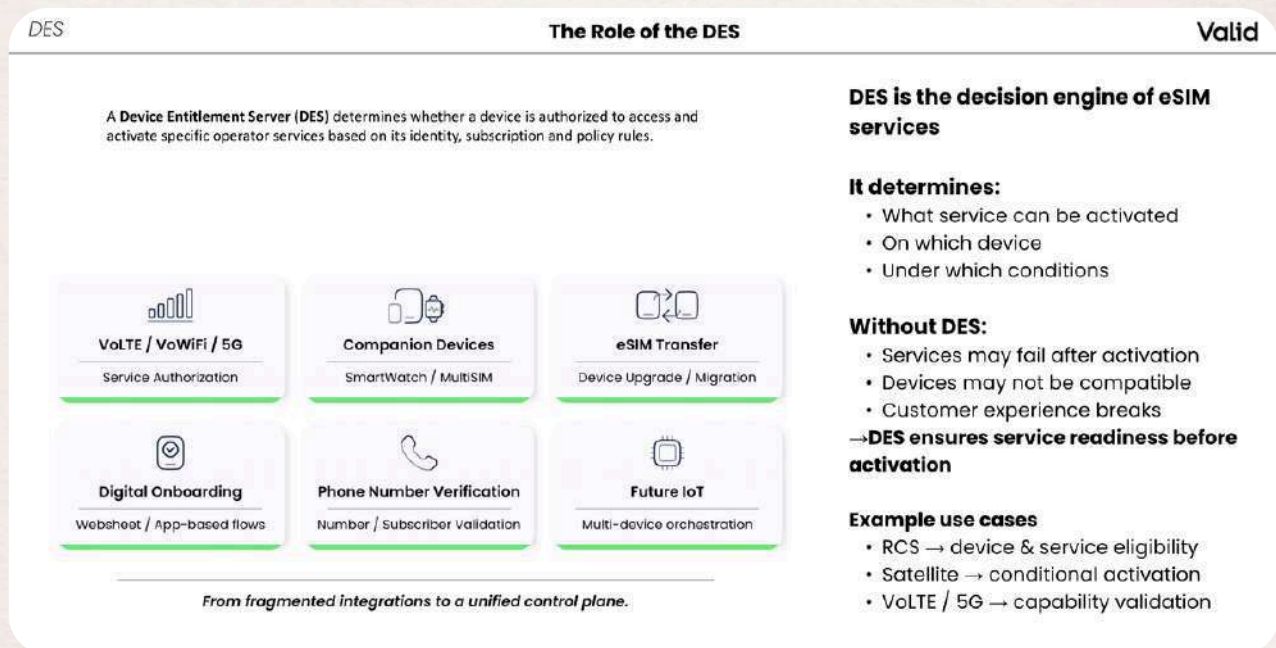
Seen in full, the chain runs from the device, through the app or web flow, to identity and authentication, then the entitlement server, the SM-DP+, the operator's BSS and OSS, notifications, and only then service activation. Everything below the visibility line has to be invisible to the customer, and the operator has to meet three expectations at once: activation must be immediate with no manual steps, services must be usable the moment a profile installs, and the experience must be identical on every device and channel.

THE DEVICE ENTITLEMENT SERVER

The DES is not part of the original SGP.22 architecture, and Pulido was explicit about that, but it has become a key component because downloading a profile does not mean the service is ready. A profile can be installed with no plan assigned and nothing activated. Before activation the operator has to validate the subscriber, the device and the service eligibility, in real time and

across several systems. The DES is the real-time decision engine that does this, built on GSMA TS.43 and OEM frameworks. It determines what service can be activated, on which device, and under which conditions.

Its value shows in what it unlocks. Service authorisation for VoLTE, VoWiFi and 5G. Companion devices, so a smartwatch can carry an associated subscription. eSIM transfer, so a customer moving to a new phone does not have to contact the operator to have a fresh profile issued. Digital onboarding without a printed QR code, which he framed pointedly: the whole architecture is designed to work digitally, so why reintroduce paper. Phone number and subscriber validation. And emerging cases including RCS, satellite and IoT. Without it, services fail after activation, devices turn out to be incompatible, and the customer experience breaks.



FROM AUTHORISATION TO BUSINESS VALUE

Pulido was clear that the DES is commercial as much as technical, because it controls who gets what and how services are monetised. New value-added services create new things to sell, from 5G and HD voice to feature-based plans and device-based entitlements. At the same time it removes cost:

fewer failed activations, particularly on companion devices, fewer trips to a shop, fewer calls to the support centre and less manual intervention. The same mechanism therefore appears on both sides of the ledger, as revenue growth and as cost reduction, and lands as a better customer experience with less friction.



WHY THE DES ALONE IS NOT ENOUGH

The DES has to connect to the AAA and identity layer, to BSS and CRM, and to the SM-DP+, of which an operator usually has two or more. Every deployment therefore repeats a set of costly integrations that each need testing. Vendors differ in their particularities even when everything is API-based. Visibility stays limited, because the DES does what it does and nothing more, and there is no single control point across teams or end-to-end journey tracking. For a small operator with one BSS and one CRM this is manageable. At scale it breaks.

That leaves three operating models. A standalone DES is fast to deploy but limited in scalability. Partial orchestration reduces complexity but leaves the estate fragmented. Full orchestration puts a single integration layer in place with control of the whole lifecycle, and that is where Pulido argued the market is heading.

CONSUMER ORCHESTRATION: SM-CONNECT

Valid's orchestration service is SM-Connect, which he described as a central command plane and, more plainly, as a library of APIs. It is a cloud-native, multi-tenant platform sitting between the commercial channels and the operator's IT and core network on one side, and the remote SIM provisioning ecosystem on the other, coordinating journeys across web, app and stores, bridging BSS and CRM with the SM-DP+ and entitlement servers, and managing the lifecycle from reservation through to transfer. The company positions it as providing a single pane of glass with end-to-end visibility across the eSIM lifecycle.

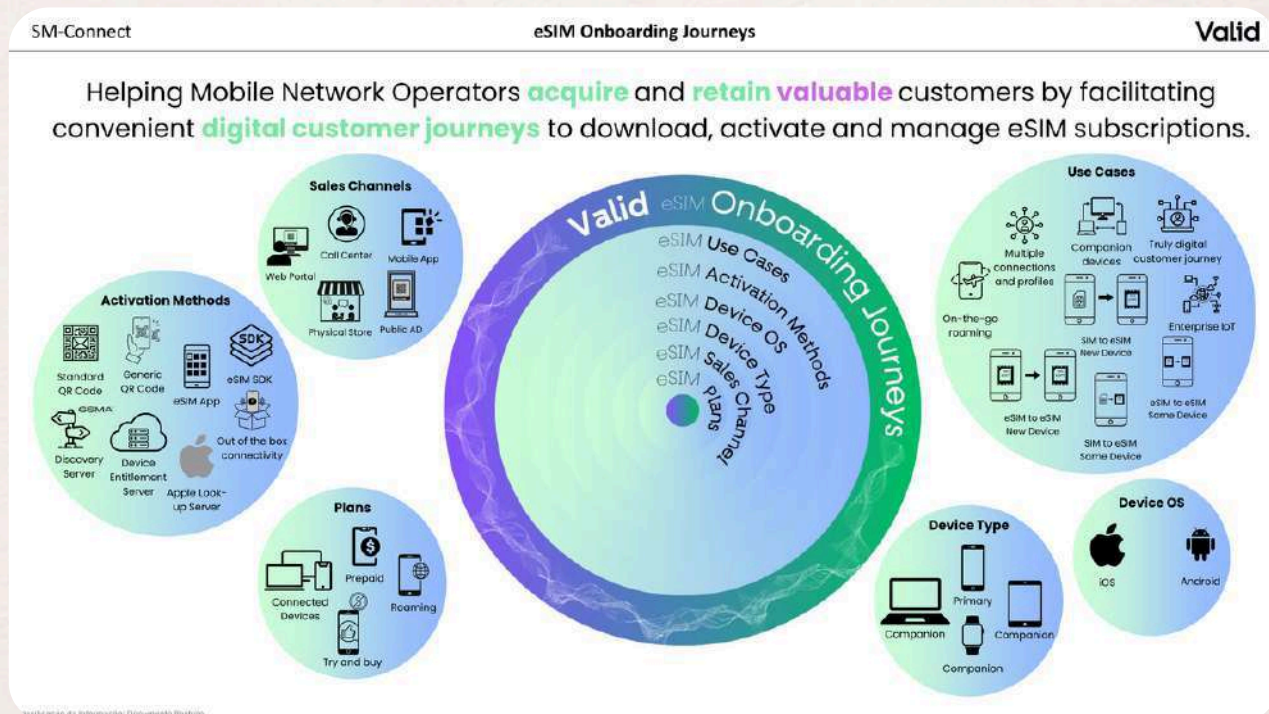
The structural claim is simple arithmetic. Instead of a maze of point-to-point connections, the operator maintains three or four integrations into one layer, which then handles the rest. DES remains the decision layer and SM-DP+ remains the execution layer; orchestration is the control layer coordinating channels, systems and lifecycle flows between them.

SM-Connect	What is it	Valid
What is SM-Connect? The Central Command Plane SM-Connect is a cloud-native, multi-tenant eSIM Orchestration solution. It acts as the backbone that connects commercial channels and operator IT and core network to the complex RSP ecosystem. - Coordinates journeys across web, app, and stores. - Bridges BSS/CRM with SM-DP+ and Entitlement Servers. - Manages the complete lifecycle: from reservation to transfer. “More than a flow orchestrator, it provides the operating model that allows operators to industrialize eSIM journeys with minimal impact on their core BSS landscape.” – Technical Product Guide		

DIGITAL ONBOARDING JOURNEYS

The part Pulido considered most valuable commercially was digital customer acquisition. Orchestration covers the activation methods, which now extend well beyond the standard QR code to generic QR codes for campaigns, operator eSIM applications, an eSIM SDK, the device entitlement server, and the GSMA or operator SM-DS discovery service. The discovery service is what makes a new phone connect and receive its subscription on first power-on without the customer doing anything.

It also covers the sales channels, web portal, retail store, call centre and public campaigns, and the eKYC step that identifies a customer who never visits a shop. His stated ideal is that a subscription should be contracted in one step: plan selection, identity verification, payment and delivery of the subscription in a single session, on any device, on any operating system, with the same experience throughout.



IoT: THE SAME PROBLEM, MULTIPLIED

SGP.32 differs from SGP.22 in the obvious way: in consumer there is a person holding the device and making connectivity decisions, and in IoT there is not. The specification introduces the eIM, the eSIM IoT remote manager, which handles subscriptions on the device, pushes new ones and monitors how the device is connected in the field.

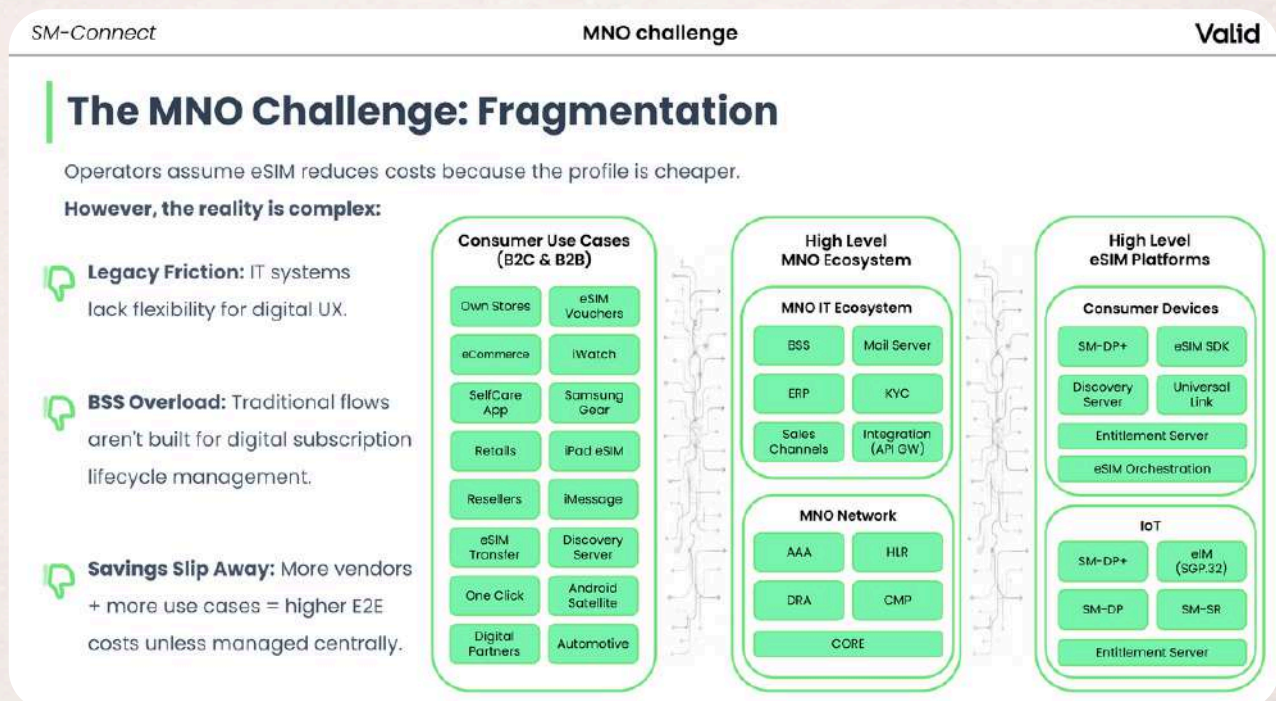
Pulido raised what he called a philosophical question: who owns the eIM. A service provider controlling it can change subscriptions; so can a device owner. His observation is that operators are increasingly taking that role, because they already run connectivity management platforms and have the operational knowledge, and because the eIM combined with a CMP is a considerably more powerful tool than either alone. The eIM also governs the two download models, direct where the device fetches the profile from the SM-DP+, and indirect where the eIM acts as a proxy for devices that cannot reach an SM-DP+ themselves.

Then the architecture grows again. Around the eIM sit the CMP, the BSS, an entitlement server for cases such as automotive, enterprise channels, and quality of service solutions whose output feeds decisions at CMP or eIM level. Operators may run more than one eIM and more than one SM-DP+. The legacy M2M estate built on SGP.02, with its SM-DP and SM-SR, will remain in service for years alongside all of it. And underneath, the device landscape is fragmented in a way consumer never was: smart meters, asset trackers, automotive, routers, industrial gateways, healthcare devices, wearables, cameras, sensors and point of sale terminals, each with its own operating system, power and connectivity constraints. Consumer has two dominant operating systems. IoT has as many as there are use cases, and the deployments run to tens of thousands or millions of units. The need for orchestration is not new in IoT, it is the consumer problem multiplied by fleet size.

TWO IOT JOURNEYS

Onboarding starts by registering the device by its EID, binding it to the right tenant, fleet or device group, creating the device record in the eIM, and leaving it ready for profile lifecycle operations. There is no user to complete a form, so the device onboards itself into the operator's subsystems, and it is handled as a fleet rather than one unit at a time.

Activation identifies the device or fleet and the switch trigger, selects the old and new operational profile, executes the profile switch or operator migration, and tracks the result and connectivity status. Pulido's example was 100,000 connected cars changing subscription at once. Orchestration tells the SM-DP+ to prepare 100,000 downloads, identifies which devices are targeted, and then checks connectivity status from the CMP, because a device that is out of coverage cannot change its subscription and there is nobody there to help it. Only the reachable devices receive activation codes. That check is what reduces the failure rate and makes predictive maintenance possible.



Q&A HIGHLIGHTS

I do not fully understand the concept of orchestration. It seems useful for MNOs?

Pulido gave two benefits. The first is integration: an operator has many components that must be made to work in parallel, and orchestration gives a single point of integration rather than many separate ones, which reduces complexity directly. The second is commercial, in that it gives the operator the ability to offer more services to its customers off the same foundation.

We face difficulties in both consumer and IoT. How would we actually use this?

His answer widened the frame. Orchestration is not only for operators. On the consumer side, several major device makers already implement orchestration in the way they deliver activation codes to their customers, and both device makers and service providers, in consumer and in IoT, benefit from an orchestration layer. They would not connect to a BSS or CRM, since those belong to the operator, but there are other components they can interconnect through it.

So it can also combine with entitlement?

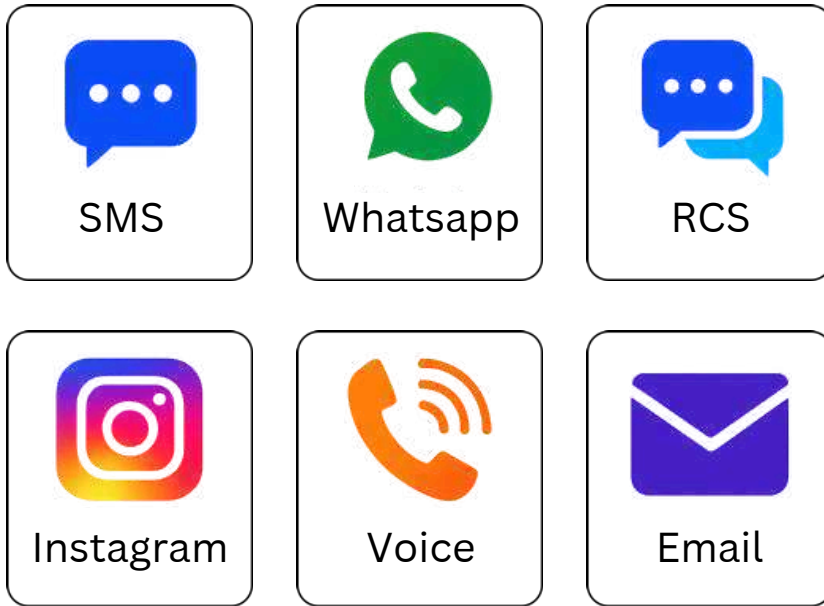
Yes, and he noted the commercial pressure behind it. The entitlement server is one of the components that adds most value for an operator and can be integrated through SM-Connect. Many device makers are now requiring operators to support a device entitlement server, because that support is what allows the device maker to offer SIM to eSIM and eSIM to eSIM transfer.

CONCLUSION

The argument holds together because it never claims the standard is wrong. SGP.22 and SGP.32 define the interfaces between the main components and do it well. What they do not define is the digital journey around those components, which is where operators actually spend their integration budgets and where customers actually experience failure. The entitlement server answers what a subscriber is allowed to use; the SM-DP+ executes; and Pulido's case is that the layer coordinating the two is now the part that determines whether an eSIM deployment scales or stalls. In IoT, where there is no user to work around a broken flow, that case is harder to argue with.

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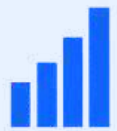
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FROM ROAMING TO **INTELLIGENT** CONNECTIVITY



HOW eSIM IS RESHAPING GLOBAL MOBILE ACCESS

PRESENTER

SARA YAGHOUBI

Director of growth, Monty eSIM

PRESENTED BY

MontyeSIM Hub

INTRODUCTION

Sara Yaghoubi, the Director of Growth at Monty eSIM, took the reasonable view that nobody needed eSIM explained again, and asked a different question: what does eSIM become once the technology itself is no longer the story? Her answer was that the market is moving from eSIM as a travel product to eSIM as a programmable connectivity layer, and that this shift changes distribution, operator participation, commercial models, routing, and ultimately who owns the customer relationship. The session traced that move through five stages.

THE COMPANY: MONTY ESIM HUB

Monty eSIM is the eSIM business of Monty Mobile, and its platform is the Monty eSIM Hub. Yaghoubi described the Hub as the company's response to the market structure she had set out: one platform supporting API and reseller access for distribution, a full white label option for brands wanting their own app and web experience, and wholesale and operator partnerships for buying, supplying or roaming onto coverage. The stated objective was not another single-sided reseller platform, but one where participants each contribute and draw on different strengths.

THE PRESENTER

Sara Yaghoubi is Director of Growth at Monty eSIM. She promised not to turn the session into a product pitch and largely kept to it, spending her time on market structure, commercial models and operational quality rather than on her own platform, which appeared near the end as one illustration of the hub model. Her framing was that of someone who deals with partner integrations and has watched which ones actually work.

THE TRAVELLER MOMENT

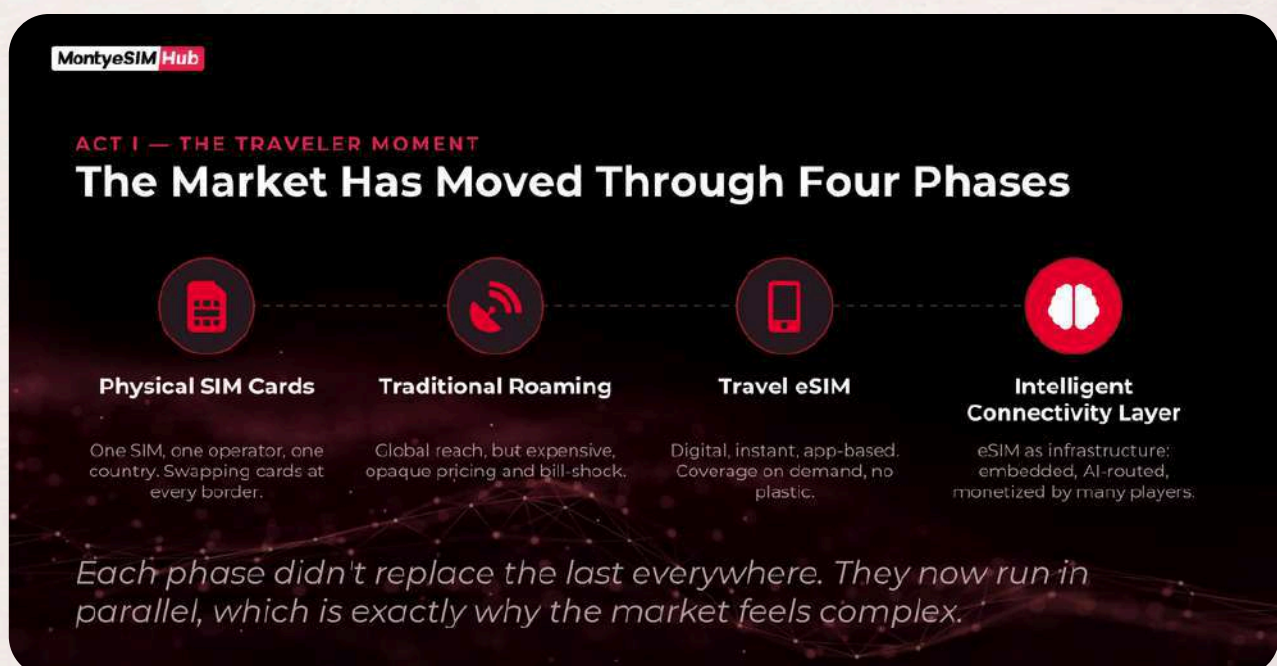
She moved quickly through the traveller pain point, but made one commercial observation worth isolating. The first ten minutes after landing is a very high intent distribution moment. The passenger reconnects to no signal and no data, scrambles for airport Wi-Fi or a SIM queue, then feels relief the moment data returns, because maps, rides, messages and payments become possible at once.

Whoever owns that moment can own the next action too, whether transport, payments, bookings or navigation. That is why eSIM is increasingly embedded into the travel journey rather than sold beside it.

FOUR PHASES, STILL RUNNING IN PARALLEL

The market has moved through four phases. Physical SIM cards put control in the operator's hands: one SIM, one operator, one country, with a swap at every border. Traditional roaming extended that control through operator relationships, at the cost of expensive and opaque pricing. Travel eSIM moved digital distribution outside the operator's environment for the first time. The intelligent connectivity layer, the phase now forming, is where the network and the commercial route are selected dynamically.

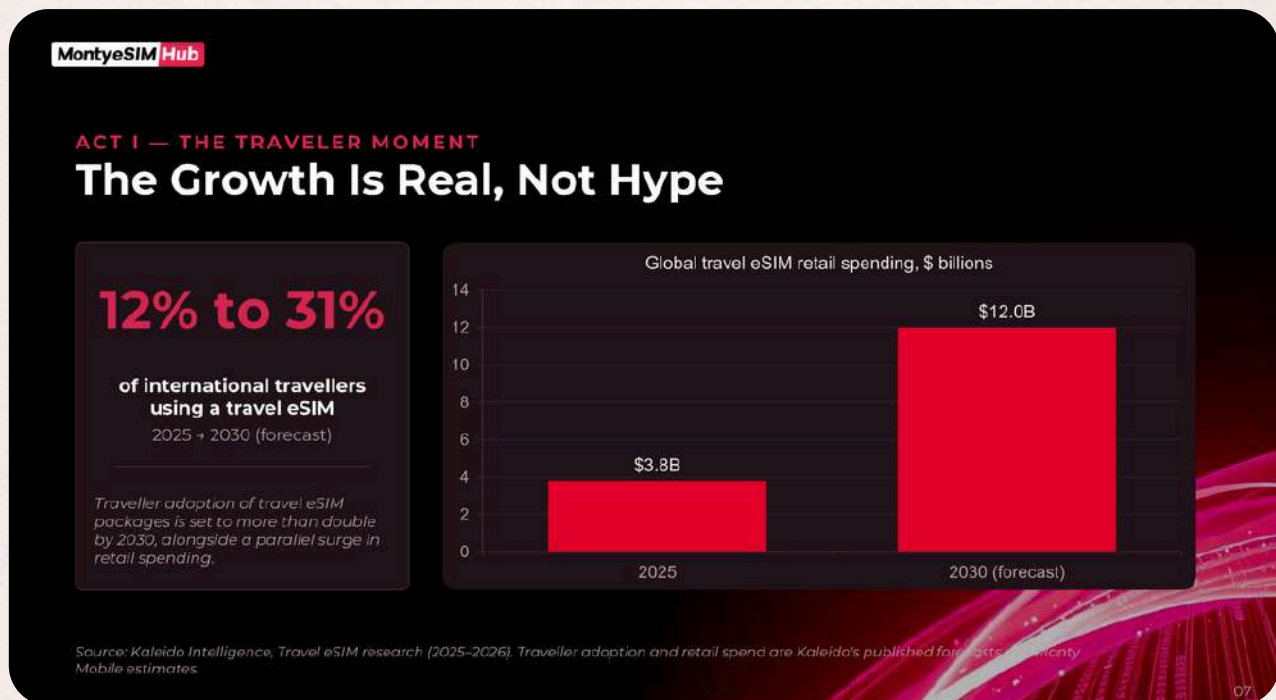
No phase replaced the one before it. All four coexist, layered rather than sequential, which she offered as the direct explanation for why the market feels as complex as it does.



THE GROWTH, AND WHAT SITS BEHIND IT

Citing Kaleido Intelligence research from 2025 to 2026, and flagging that these are Kaleido's published forecasts rather than Monty Mobile estimates, she put traveller adoption of travel eSIM at 12 percent of international travellers in 2025 rising to 31 percent by 2030, more than doubling. Retail spending is forecast to move from 3.8 billion dollars to 12 billion over the same period, more than tripling.

She was more interested in what sits behind the numbers. As adoption scales, the market generates not only retail demand but wholesale demand, more embedded distribution, more pricing pressure, and more need for automated routing and supplier management. Her conclusion was that the real opportunity is no longer retail spending but the infrastructure required to support that growth, which changes the question from how much can be sold to whether the right position in that layer is held at all.



CONNECTIVITY NOW LIVES IN MORE PLACES THAN TRAVEL

Six verticals now carry connectivity. Travel and roaming remains the original use case and the biggest volume driver. Digital wallets and fintech embed it into payment apps, which makes a payment app a connectivity provider.

Airlines and hospitality treat it as a loyalty and ancillary revenue product. In super apps, connectivity becomes a feature rather than a product. Enterprises manage global teams and devices without local SIM logistics. IoT and M2M covers devices that never see a human hand.

Her caution was against treating these as one market. Each has distinct operational and commercial requirements, sharing only the connectivity layer beneath them, and IoT in particular delivers scale on very different terms. The consequence is that the customer increasingly reaches connectivity through an airline, a wallet or a bank rather than choosing an eSIM provider at all.

THE OPERATOR DILEMMA

Every provider meets the same operator question: will eSIM cannibalise roaming revenue? Yaghoubi argued the framing is wrong. eSIM is not replacing the value of roaming, it is expanding how global connectivity can be packaged, distributed and monetised. The strategic risk is not lost revenue as such but losing the customer relationship, the pricing and the experience to apps, wallets, airlines and resellers who move faster. Operators keep real advantages throughout: network assets, local economics, roaming relationships and regulatory positioning. So the question is not whether eSIM will affect roaming, but how operators should participate in the new value chain.

MontyeSIM Hub

ACT II — CONNECTIVITY AS INFRASTRUCTURE

The Operator Dilemma

eSIM is not replacing the value of roaming. It is expanding how global connectivity can be packaged, distributed, and monetized when the right model is chosen.



Sit on the sidelines

Risk losing the customer relationship to apps, wallets, airlines and resellers who move faster.



Participate strategically

Open new revenue through wholesale data, branded travel eSIM, API partnerships and roaming-based models.

The question is no longer "Will eSIM impact roaming?" — it's "How should operators participate in the new eSIM value chain?"

FOUR OPPORTUNITIES, VALUED DIFFERENTLY

The shift creates value in four areas. New revenue without new infrastructure, monetising inbound and outbound travellers without building networks. Retention through embedded connectivity, a reason to stay rather than simply roam, accruing to whichever brand the traveller trusts. A new marketing surface, since data plans reach broader, younger and more digital-first audiences. And simpler operations, with one platform managing distribution rather than dozens of manual bilateral agreements.

The value differs by where a participant sits. A distributor values retention and ancillary revenue, an operator values traffic, a platform values margin, reach and control. Which turns the question from who sells the eSIM into who controls the front end, who manages the connectivity, who carries the commercial risk, and who owns the customer data.

FIVE WAYS TO PARTICIPATE

- **API integration.** Plug into an existing engine, keep your own front end and own the customer experience. Suits fast movers with an app or portal already.
- **Reseller portal.** Orders placed and managed through a ready-made dashboard. Quickest route to market, at the cost of control over the customer experience. Suits teams without development resources.
- **Full white label.** A fully branded app, website and admin portal delivered in days rather than the months an in-house build would take. Suits brands wanting full control of the experience.
- **Operator connectivity partnership.** Operators supply rates, coverage or roaming access into a wider distribution network, without negotiating new deals country by country.
- **Wholesale connectivity hub.** Buying or selling bulk coverage as a two-sided marketplace, for players optimising global cost and coverage at scale.

Her advice on choosing was the most practical moment in the session: the commercial model should follow the partner's real capability, not what the partner thinks it wants. Many arrive asking for a full white label solution and, on examining their requirements, turn out to be better served by the API, which reaches the market faster and leaves more room to shape the experience themselves.

MontyeSIM Hub

ACT III — NEW BUSINESS MODELS EMERGING

Five Ways to Participate in the eSIM Value Chain

Model	How it works	Best for
API integration	Plug into an existing engine via API, keep your own front end	Fast movers who already have an app or portal
Reseller portal	Place and manage orders through a ready-made dashboard	Teams without dev resources for a full integration
Full white-label	A fully branded app, website and admin portal built for you	Brands wanting full control of the experience
Operator connectivity partnership	Operators supply rates, coverage or roaming access into a wider distribution network	Operators wanting inbound traffic without new deals per country
Wholesale connectivity hub	Buy or sell bulk coverage as a two-sided marketplace	Players optimizing global cost and coverage at scale

13

WHY THE HUB MODEL IS GROWING

The hub works because coverage is asymmetric. A provider may hold competitive rates in one region and be weak in another; an operator may have strong domestic economics and very limited global distribution. The hub lets each participant monetise its strengths and source where it is weak, bringing what it has and taking what it needs.

Selling coverage turns owned capacity into a wholesale product, removes the need for buyers to negotiate with every operator individually, and earns revenue from traffic that would otherwise never reach the network. Acquiring coverage fills gaps where a competitor has better rates, blends sources to route to the best-performing network, and localises pricing without owning every underlying agreement. The same platform can sit on both sides of that trade at once, which is what makes the hub structurally different from a single-sided reseller, and what makes routing, data quality and settlement strategic rather than merely operational.

THE COMPLEXITY BEHIND ONE TAP

Yaghoubi corrected her own slide title: for professionals the complexity is not hidden, it is underestimated. New entrants look at the front end and conclude the product is simple. The difficult part is not generating a QR code. It is maintaining consistent activation, pricing, usage data, support and settlement across multiple partners and platforms.

Behind one tap sits a five-step engine: provisioning from multiple operators and aggregators, real-time pricing and routing, activation on the device, usage visibility surfaced back to the user, and settlement across every partner in the chain. Each step involves a different partner, a different system and a different point of possible failure, which is why quality varies so much between providers, and why a weakness in one layer can destroy either the customer experience or the economics.

That leads to a procurement warning worth repeating. The cheapest supplier at the point of purchase often proves the most expensive across the full cycle, once failed transactions, failed activations, support volumes and refunds are counted. The stronger provider is not the one with the largest catalogue but the one delivering predictable service through an unpredictable supplier environment. Integration is only the beginning: the customer sees one tap, but the partner carries the reputational risk when it fails.

WHERE THE MARKET IS HEADING

The next phase, she argued, will be defined less by profile delivery than by decisioning: which network to use, which supplier fulfils the order, which identity the profile carries. Those decisions will increasingly be automatic, and four shifts follow.

- **AI-driven routing**, addressing quality and cost volatility by selecting the best network in real time.
- **Multi-IMSI and smart profiles**, solving inconsistent cross-border coverage with one profile that shifts identity across networks, while adding complexity of their own.
- **eSIM beyond travel**, with enterprise and IoT as the next volume drivers, removing the seasonality that has providers waiting on summer and winter travel peaks.
- **Connectivity marketplaces**, which reduce fragmentation across supplier and operator relationships.

Q&A HIGHLIGHTS

OEM customers just want connectivity. But orchestration sits with a single mobile network operator, so how does it work across different operators for an end user?

Yaghoubi's answer was that this is one chain rather than one company's problem. Operators, wholesalers, marketplaces and eSIM providers each play a role, and the task is for each to understand what it can contribute and what it needs to draw. An operator can offer roaming in its own market while taking global coverage it does not have. Bringing those parties together, in a hub or whatever else it is called, is what lets the customer receive simplicity from a chain that is not itself simple.

Does an industry built on making connectivity disappear make the people working in it invisible too?

She agreed, and expected it to go further. If the market develops as anticipated, the user experience becomes progressively simpler, from installation through to a top-up, or to not needing another installation at all. The invisibility is the point rather than a side effect.

Two further questions the presentation answers directly, though they were not raised from the floor:

If coverage counts are becoming meaningless, what should a buyer actually evaluate?

Activation experience measured in seconds rather than minutes, with clear instructions across every device type. Pricing transparency, meaning no hidden fair-use caps and no surprise throttling mid-trip. Real-time visibility, so users and partners see consumption as it happens. And support resolution time, meaning support that can fix an activation failure while it is happening. She called country counts increasingly meaningless as a comparison metric.

Is AI-driven routing a genuine advance, or cost selection under a new name?

Yaghoubi drew that line herself. AI routing is only meaningful if reliable network and commercial data feed the decision, so traffic reaches the right operator. Without that data behind it, she said, it is cost selection performed by an algorithm. The same caution runs through her treatment of marketplaces, which she credited with reducing fragmentation only insofar as they solve trust, quality and settlement rather than aggregating catalogues.

CONCLUSION

Is AI-driven routing a genuine advance, or cost selection under a new name?

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TRAVEL eSIM AFTER THE HYPE



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GLOBAL
CONNECTIVITY**

PRESENTER

ÖZGE KARAMAN

Head of Enterprise at Best
Connect

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INTRODUCTION

The eSIM Marathon 2026 turned from a question of whether travel eSIM would succeed to a more advanced one: what comes next for global connectivity. In her session, Özge Karaman of Best Connect argued that the debate is settled. Travel eSIM has moved from a niche product to a travel essential, and the market is now entering a new phase in which connectivity is embedded across the entire digital travel ecosystem. Her session traced the market's maturity, the shift beyond simple roaming replacement, the rise of embedded connectivity, and how operators and brands can build a sustainable advantage.

THE COMPANY: BEST CONNECT

Best Connect is a Verscom group company with more than 22 years of experience in telecommunications, built by a team from a Turkish telecom operator background. It operates as a full MVNO with a proprietary core network and IMSI ownership, and has developed its travel eSIM platform in-house with end-to-end ownership, allowing it to customise products to partner needs. Its reach spans more than 200 countries with access to over 900 roaming destinations, offered through flexible partner models including white-label and co-branded eSIM products.

THE PRESENTER

The session was led by Özge Karaman, who heads enterprise growth at Best Connect. She brings more than 13 years in telecommunications, including over a decade at Türk Telekom, where she led the roaming department, product marketing, and growth and revenue management. She now works across the travel ecosystem with enterprise brands, mobile operators, banks, and app-based businesses.

FROM NICHE PRODUCT TO TRAVEL ESSENTIAL

Karaman placed the market at the early-majority stage of the adoption curve. The tipping point, as she framed it, is a change in the question travelers ask. They no longer ask what a travel eSIM is; they ask which travel eSIM to buy before a trip. The market now understands the product, competition is rising, and the moment to enter is now.



A FAST-GROWING, STRATEGIC MARKET

Per the figures presented, the travel eSIM market is set to grow roughly 3.5 times, from \$2.1 billion in 2025 to \$15 billion by 2030, at a 38% CAGR. Karaman stressed that this growth is driven less by rising traveler numbers than by three structural shifts:

- **Device compatibility:** around 50% of smartphones were eSIM-capable in 2025, projected to exceed 90% by 2028, so the hardware barrier is disappearing.
- **Silent roamer conversion:** about 70% of travelers historically avoided roaming due to bill shock and opaque pricing; roughly 40% are now switching to eSIM, activating users who previously stayed offline abroad and creating an entirely new market.

- **B2B2C integration:** airlines and travel agencies embedding eSIM into booking flows lower customer acquisition cost while increasing volume.



THE SHIFT IN USER PREFERENCE AND CHANNELS

According to a Statista 2025 survey of more than 18,000 travelers, travel eSIM has become the leading connectivity choice: 39% of travelers now buy a travel eSIM, ahead of operator roaming packages at 34%, local SIM cards at 17%, and Wi-Fi-only at 8%. Karaman was careful to note this does not mean roaming disappears; some operators still offer strong roaming prices. It means the default is shifting.

The distribution mix is shifting with it. Where direct eSIM brands once accounted for nearly all sales, the channel now splits, per Juniper, Counterpoint, and Omdia analysis, across direct brands (42%), OTAs and travel platforms (20%), mobile operators (18%), fintechs and super apps (12%), and airlines (8%). The category has moved into its second phase, from standalone brands to embedded connectivity.

AWARENESS IS NOT YET ADOPTION

Rising usage has lifted awareness worldwide. Per Kaleido Intelligence, around 74% of travelers are now aware of eSIM. But awareness has outrun behaviour: only 45% have ever used an eSIM, and just 25% use one regularly when abroad. Karaman identified this gap as the industry's central near-term challenge, converting awareness into adoption, and argued the missing ingredient is trust and a sense of security at the point of purchase.



BEYOND ROAMING REPLACEMENT

The first phase of travel eSIM simply replaced roaming: a single-trip data SIM swap, a one-off purchase for one-off use, app-first and standalone, competing on price and coverage, with the traveler relationship ending at landing. Karaman placed that phase firmly in the past.

The next phase is embedded, contextual, and continuous. Connectivity is folded into booking and travel flows, sold alongside insurance, transport, and financial services, offered through multi-trip subscriptions and loyalty-linked plans, and tailored contextually by destination and behaviour, so the traveler relationship persists across trips rather than ending at the airport.

EMBEDDED CONNECTIVITY IS NOW MAINSTREAM

Karaman argued that embedding eSIM is no longer a niche experiment but a mainstream distribution decision, citing brands that have added it to their user journeys. Revolut, a fintech, launched a travel eSIM in 2022 and has since moved toward full mobile plans. Trip.com sells travel eSIM directly within its booking journey, completing activation and payment in-app. European airlines increasingly bundle free mobile data for customers. And a communication app with a very large active base recently launched eSIM to its existing, daily-engaged users, an example of how a company that already owns the customer relationship can launch connectivity in a matter of weeks.

The through-line, in her words: fintechs and super apps are not entering telecom to become operators. They are embedding connectivity to deepen engagement, increase retention, and expand their digital ecosystem, keeping the customer relationship to themselves.

THE THREE-PHASE EVOLUTION

Karaman framed the category as moving through three phases, from product sales to a distribution model:

- **B2C (2021-2023):** standalone travel eSIM, where the customer searches, discovers, and buys directly from a brand.
- **B2B2C (2023-2025):** embedded travel eSIM, offered to users through platforms and apps as an in-flow purchase.
- **B2B Enterprise (2025 onward):** corporate mobility and connectivity solutions for companies and their employees, the next growth frontier.

Travel eSIM: a three-phase evolution from Standalone to Enterprise



The category is shifting from product sales to a distribution model.



Source: Best Connect strategy analysis - GSMA, Kableila 2025.
BEST CONNECT - Travel eSIM Kermote

THREE FRONTS FOR OPERATORS

Karaman argued operators can grow with travel eSIM across three fronts. In consumer (B2C), they should launch their own branded travel eSIM to keep customers in their ecosystem and protect roaming revenue. In distribution (B2B2C), they can partner with banks, airlines, and super apps, relationships they often already hold, to reach large audiences via white-label or API integration. In enterprise (B2B), they can integrate travel eSIM into corporate mobility programmes. The recurring theme: operators should leverage the customer relationships they already own to serve new connectivity needs.

FOUR STRUCTURAL TRENDS FOR THE NEXT FIVE YEARS

Looking ahead, Karaman identified four forces that will shape the market:

- Borderless connectivity, as travelers stop wanting to think about connectivity abroad and eSIM becomes a global standard.
- Expansion of digital channels, as every app becomes a potential point of sale.

- Rising data demand, pushed higher by AI, video, and cloud usage.
- Secure and seamless access, as expectations for security, privacy, and uninterrupted service rise.

BUILDING SUSTAINABLE ADVANTAGE

Karaman closed on the argument that travel eSIM is no longer just a product but a new connectivity distribution model. Sustainable growth, she argued, comes from combining three things: owning the customer, direct access to travelers and control of the relationship; the right partnerships that expand reach and add value; and strong infrastructure, reliable technology and global connectivity that ensure scalability and performance. The businesses that own the customer relationship and journey, she concluded, will be the distribution leaders of the future.

SESSION DISCUSSION HIGHLIGHTS

Q1: Is the debate over whether travel eSIM will succeed now settled?

Yes. Karaman argued the market has moved past that question. Travelers now ask which travel eSIM to buy rather than what one is, and the market sits at the early-majority stage of adoption.

Q2: If awareness is already around 74%, why is adoption still low?

Because awareness has outrun trust. Only 45% have ever used an eSIM and 25% use one regularly. Converting awareness into adoption depends on making buyers feel secure and confident at the point of purchase.

Q3: Does the rise of travel eSIM mean the end of operator roaming revenue?

Not necessarily, but it is a real risk. Roaming revenue concentrates in enterprise, and if that spend shifts to travel eSIM brands, operators will lose it unless they enter the market across consumer, distribution, and enterprise fronts.

Q4: Why are fintechs and super apps entering connectivity?

Not to become operators, but to deepen customer engagement. Embedding connectivity increases app usage and daily touchpoints, letting these brands strengthen retention and keep the customer relationship to themselves.

CONCLUSION

Best Connect's central message was that travel eSIM has entered its post-hype phase. The product question is answered; the distribution question is now everything. As connectivity becomes embedded across banks, airlines, OTAs, fintechs, and enterprise mobility programmes, the winners will be those who own the customer relationship and pair it with the right partnerships and infrastructure. Best Connect positioned itself, with an in-house platform built for flexibility across every phase and partner model, as ready to help operators and brands make that shift.



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SPARKLE

INTRODUCTION

The eSIM Marathon 2026 brought together industry leaders to examine one of the most consequential questions facing mobile network operators today: how to respond to the rapid rise of eSIM travel connectivity. Among the standout sessions was a discussion led by Maria Rossou of Telecom Italia Sparkle, who offered a clear and pragmatic reframing of the issue. Rather than treating eSIM as a threat to operator revenue, Sparkle positions it as a tool operators can use to protect the customer relationship and open an entirely new revenue stream, without touching their core network.

THE COMPANY: SPARKLE

Sparkle (Telecom Italia Sparkle) is a major international wholesale telecommunications provider. Its portfolio spans IP and data services, an active programme of submarine cable development, and one of the strongest international voice businesses on the global map. In recent years the company has become a significant operator in mobile connectivity and roaming, and last year it launched its own eSIM service. Sparkle reaches more than 600 operators worldwide through TIM roaming agreements, supported by its global connectivity network.

THE PRESENTER

The session was led by Maria Rossou, who has spent around 25 years at Telecom Italia Sparkle since joining in 2001. Over that time she has held sales roles across voice, IP and data, and now focuses on mobile data, connectivity, roaming, and SMS. Her direct experience on the wholesale side gave the session a grounded, operator-focused perspective on how eSIM travel fits into an MNO's existing business.

THE MNO TRAVEL REVENUE CHALLENGE

Roaming has long been one of the primary revenue streams for mobile operators. That revenue is now leaking away. As subscribers travel, a growing share switch off operator roaming and turn instead to global eSIM apps, becoming what the industry calls silent roamers. The revenue does not disappear; it moves to the eSIM providers.

The cost to the operator is twofold. Beyond the lost revenue, the operator loses visibility of the subscriber during travel, and with it the continuity of the brand relationship at exactly the moment the customer is relying on connectivity most. Compounding the problem, most operators still lack a simple monetization model for this scenario. As Rossou put it, MNOs find themselves at a crossroads, and the time available to decide is shrinking.



THE URGENCY IN ESIM GROWTH

Three shifts, drawn from the session, explain the urgency:

- eSIM-capable smartphones have become standard, so travelers can activate a travel eSIM instantly rather than seek out a local SIM.

- Travelers increasingly expect immediate, fully digital activation.
- Bill shock pushes users toward alternatives. Many subscribers have received unexpectedly large roaming bills, and the safest alternative in their eyes is a travel eSIM.

WHY ESIM TRAVEL SUITS MNOS

Operators are often cautious about launching new services, and technical departments are decisive gatekeepers. The strength of the eSIM travel model, as presented, is that it sidesteps the usual integration burden entirely:

- It is data-roaming based, with no MSISDN integration required.
- It requires no changes to the core network, and no HLR or HSS integration.
- Integration is handled through connectivity management platform APIs.
- It is compatible with the operator's existing eCommerce; as Rossou noted, **no MNO lacks an eCommerce site**, so the service can be added as a new page or link.

The result is an add-on to the operator's portfolio that raises average revenue per user and remains fully separate from the standard mobile business.

Why eSIM Travel is Perfect for MNOs

- ✓ Data Roaming based
- ✓ No MSISDN integration required
- ✓ No core network changes
- ✓ Integration via CMP APIs
- ✓ Compatible with existing MNO eCommerce
- ✓ No HLR/HSS integration



Launch a travel offer without touching your core network. Just your **eCommerce!**

Turn Silent Roamers into Revenue

- ✓ Digital travel add-on to existing offer
- ✓ Incremental ARPU from inactive roamers
- ✓ Independent from core mobile plan



Monetize customers who currently generate zero roaming revenue

COMMERCIAL VALUE

Sparkle frames the commercial case around four points:

- **New revenue stream:** monetize customers who currently generate zero roaming revenue.
- **Fast go-to-market:** launch a travel offer in weeks, adjusting offers to how subscribers actually travel.
- **Competitive defense:** compete directly with global eSIM players such as Airalo and Holafly.
- **Customer retention:** keep the brand relationship alive while the subscriber is outside the home network.

Because the subscriber prepays for the bundle, monetization is immediate and carries no collection risk.

TWO WAYS OPERATORS CAN USE IT

The session outlined two models, which can run in parallel:

- **Travel Companion Model:** the customer keeps their MNO SIM for voice and SMS and activates a branded travel eSIM for data abroad, consumed on Sparkle's global network. This monetizes the existing base with no change to roaming agreements and no core network impact.
- **Digital Travel Store:** a standalone, branded travel connectivity store offering global eSIM bundles with instant QR-code activation and full pricing control. This model also acquires new customers beyond the existing base.

Examples of how MNOs Can Use eSIM Travel

MNOs can monetize travel connectivity without changing their core business

1 Travel Companion Model

✓ Monetize existing base



2 Digital Travel Extension

✓ New travel product



THE AI ROAMING OPTIMIZER

Sparkle also presented an AI-driven layer to the roaming decision itself. Traditional steering follows a fixed rule, always connecting to a designated operator regardless of conditions. The AI Roaming Optimizer instead analyses radio quality, wholesale roaming cost, network congestion, user preferences, and location in real time, then selects the network offering the best combination of coverage, cost, and performance.

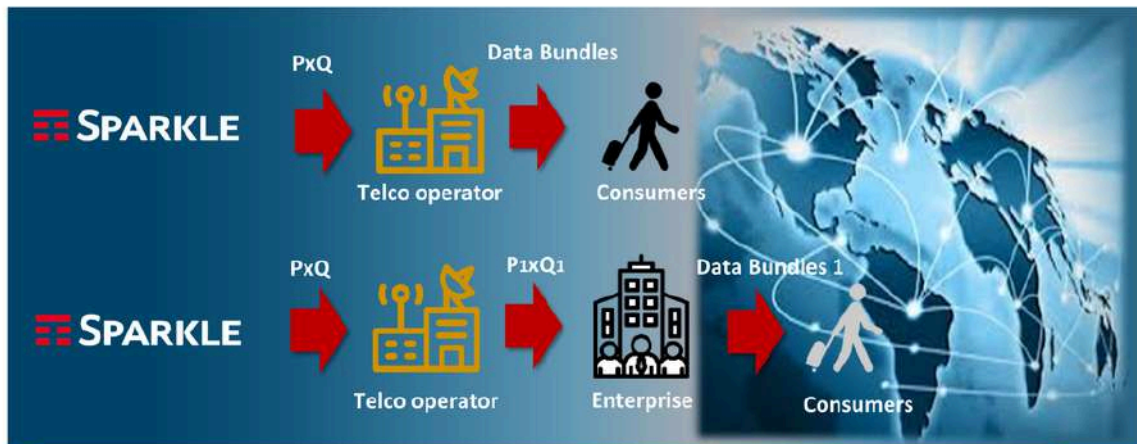
In the worked example shown, a subscriber arriving in Los Angeles is connected to the operator offering similar coverage at, per the illustration, roughly 30% lower wholesale cost and lower congestion than the default choice. For the operator this points to lower roaming costs, better profitability, and improved steering efficiency; for the customer, better network experience and faster data. The 30% figure is illustrative of the scenario shown rather than a guaranteed outcome.

THE COMMERCIAL MODEL

Sparkle supplies the eSIM solution to the operator on a post-paid basis (PxQ), meaning the operator pays only for traffic actually consumed, while end users prepay for their data bundles. The operator can also extend the model to enterprise customers, who in turn sell to consumers. Because payment follows consumption, the arrangement carries no inventory risk for the operator.

It also contains a quiet upside. According to Kaleido, only 5% of eSIM customers use their complete data bundle. The unused data is prepaid but never fully consumed, which becomes additional margin for the operator.

Sparkle Commercial Model



- Post-paid (PxQ) model: Operators pay only for actual consumed traffic
- End-users will prepay for data bundles
- Only 5% of eSIM customers utilize all complete data bundles(*): extra revenue for the Operator

(*) Source: Kaleido

12

THE WHITE-LABEL ADVANTAGE

Within the Sparkle environment, the eSIM can be deployed as a full white-label product. The operator presents the service under its own logo and branding, with no visible connection to Sparkle, while retaining bundle creation, pricing control, and access to analytics and reporting to refine promotions and marketing over time. In effect, the operator launches a service that looks entirely its own.

Q&A HIGHLIGHTS

Is this Sparkle's wholesale go-to-market?

Yes. Rossou clarified she works on the wholesale side, targeting mobile operators and aggregators, though Sparkle also serves the enterprise sector directly.

Which global networks does Sparkle use?

Major coverage comes via TIM, reaching more than 600 operators worldwide through TIM roaming agreements, supported by Sparkle's own worldwide connectivity network.

Does Sparkle also supply other eSIM providers?

Yes. Sparkle views other eSIM providers at the wholesale level as an opportunity, and also offers an outbound roaming activation service, depending on the specific customer's needs.

Is the fiercely price-competitive eSIM market still a viable target?

Rossou argued it remains the most dynamic segment. People keep traveling, data keeps moving, and monetization is still required, so while pricing pressure is real, the market is far from exhausted, and partnerships with larger players are one route through it.

CONCLUSION

Sparkle's central message was a reframing. eSIM travel is not a threat to be resisted but a tool operators can adopt to convert roaming leakage back into revenue, defend the customer relationship, and do so without touching the core network. With fast deployment, immediate prepaid monetization, white-label branding, and an AI layer to optimise the roaming decision itself, the operators that treat eSIM as an opportunity, rather than waiting to react, are the ones positioned to protect both their subscribers and their margins.



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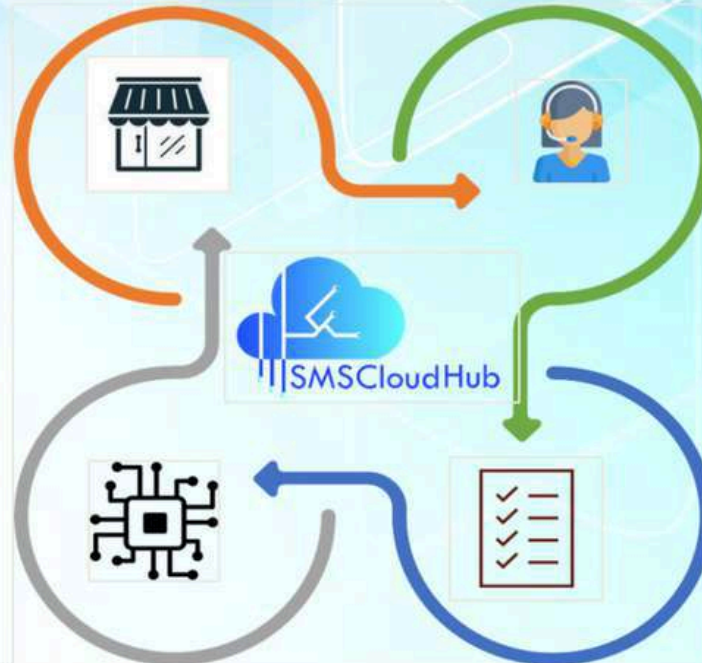


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BEYOND CONNECTIVITY



**HOW eSIM IS
POWERING THE
FUTURE OF
TRAVEL TECH**

PRESENTER

HAIDER MUSTAFA

Head of Global Partnerships
Travel eSIM

PRESENTED BY



INTRODUCTION

Most travellers pack carefully and still forget the one thing they will need within minutes of landing. Haider Mustafa opened on that observation: the phone comes out at the gate, there is no signal, and the traveller is hunting for airport Wi-Fi or joining a queue at a SIM counter. His argument was that this is not a consumer problem to be solved by better traveller habits, but a distribution problem. The businesses that already know who is travelling, where and when are the ones best placed to sell connectivity, and most of them are not doing it. The session set out the size of that gap, the three ways Xylen has built to close it, and where the company believes travel eSIM goes next.

THE COMPANY: XYLEN MANAGEMENT

Xylen Management is a UK carrier delivering data connectivity for the travel industry, based in Birmingham and operating since 2006, giving it around 20 years in the market with a team dedicated to travel. It is a GSMA member, which Mustafa said gives the company access to intelligence on global eSIM adoption, and the deck records a top-three placing in the Antonio Meucci awards for Best eSIM Provider 2026. The company works exclusively business to business: it does not sell to travellers directly, but supplies the partners who do.

THE PRESENTER

Haider Mustafa is Head of Global Partnerships at Xylen Management, working on the commercial rather than the technical side of the business, and based in Birmingham, where he was born. His session was structured around distribution: who owns the traveller relationship, how connectivity fits into an existing booking journey, and what has to be removed before a travel business will actually adopt it.

THE TRAVEL ESIM OPPORTUNITY

The numbers Xylen presented describe a market that is large, ready and barely served. There were more than 1.4 billion international trips in 2024. Around 95 percent of travellers own a smartphone, yet fewer than 12 percent currently use a travel eSIM. The company puts the travel eSIM market at 6.2 billion dollars by 2027.

Three further figures from the session sharpen the point. Citing GSMA data from 2024, Mustafa said eSIM adoption in travel grew 185 percent year on year. Some 72 percent of travellers want connectivity arranged before departure, and Xylen's own observation is that most buy and install within the 48 hours before they fly, leaving only activation and data roaming to switch on at the destination. Yet only 12 percent of online travel agencies offer eSIM at all. eSIM currently accounts for around 15 percent of global travel connectivity, a share the company expects to triple by 2030.

WHY TRAVELLERS ARE STILL UNDERSERVED

- **Roaming shock.** Unexpected bills arriving after the trip. Many travellers respond by turning data off entirely for the duration.
- **SIM swap friction.** Queues at every destination, identity checks, and compatibility problems. Mustafa noted that travellers who remove their home SIM to fit a local one sometimes lose it, and that an arriving aircraft of a few hundred passengers guarantees a queue.
- **No embedded channel.** Airlines and agents cannot easily add connectivity at the point of booking, because the integration cost has traditionally been high.
- A fragmented market. With eSIM at roughly 15 percent of global travel connectivity and expected to triple by the end of the decade, the space is wide open rather than settled.

The Connectivity Problem

01

Why travellers are still underserved



Roaming Shock

Unexpected bills — many travellers turn off data entirely.



SIM Swap Friction

Queues, ID checks and compatibility issues at every destination.



No Embedded Channel

Airlines/Agents can't easily add connectivity at booking (high cost)



Fragmented Market

Esim accounts for 15% of global travel connectivity. Will triple by 2030 = **Huge Opportunity for growth**

WHY B2B2C IS THE CHANNEL

Xylen's answer is to sell through the businesses that already own the customer relationship rather than compete for the traveller directly. Online travel agencies, destination management companies, travel agents, airlines and hotels all sit in that layer, and Mustafa's case for it rests on three points. The first is that no separate acquisition is needed. These partners already hold databases of hundreds or thousands of travellers and already know who is going where and when, so eSIM fits into a sale that is happening anyway with no SEO or cold marketing behind it. The second is timing: the offer can appear at the point of booking, at check-in, or in post-booking communications, at the moment the traveller is already thinking about the trip. The third is that the traveller benefits immediately on arrival, connected in time to reach a transfer, a hotel, or the people waiting to hear they landed safely.

WHY THE TIMING WORKS

Before turning to the platform, Mustafa set out four reasons he considers travel the largest eSIM opportunity available now. Activation is instant, with no SIM and no queue, so a traveller connects the moment they land. Coverage runs to more than 190 countries from a single platform.

There is a revenue moment at every stage of the journey, at booking, at check-in, at boarding and in the destination itself. And the model is built for business customers rather than retrofitted for them, API-first, with a travel brand able to go live in days rather than months.

Grow Together

03

Multi-level model — distribute, delegate and scale



THREE WAYS TO DEPLOY

Mustafa was candid about why the platform comes in three forms rather than one. Travel businesses are occupied with selling their core product, and it is difficult to secure enough of their attention to explain a new one. So the company built three entry points at different levels of technical commitment.

API integration embeds eSIM into a partner's own app or booking engine. Xylen offers full developer documentation, real-time provisioning it says completes in under three seconds, webhooks for usage and renewal events, and dedicated technical onboarding, with a stated go-live measured in days.

The white label portal gives a partner its own brand, domain and pricing with no Xylen branding present, along with a configurable product catalogue for choosing bundles and setting margins.

The wholesale portal is for volume. Partners buy at wholesale rates, set their own retail margin and issue eSIMs to sub-agents, franchisees or customers directly, with live visibility of stock, usage and wallet balance. Mustafa identified hotels, resorts, tour operators and cruise lines as the natural fit here, since an eSIM can be offered at check-in as a premium add-on with no technical integration at all.

All three include top-ups, which matters commercially: Xylen puts the value of eSIM data top-ups at three to five times the initial purchase.

The Xylen Platform

02

One portal. Three powerful deployment models.



API Integration

Embed eSIM into your app or booking engine in days.



White Label Portal

Your brand, your domain, your pricing. Launch in minutes.



Wholesale Portal

Buy at wholesale rates. Distribute to your network.

HOW THE PARTNER STRUCTURE WORKS

The model is deliberately multi-level. Xylen provides the platform, infrastructure and technology. Business managers sit above as resellers, aggregators and distributors. Beneath them sit sub-partners, the online travel agencies, airlines, travel agents, travel management companies, hotels and destination management companies who face the traveller. The traveller is the only party in the chain Xylen does not deal with directly, a point Mustafa returned to under questioning.

REMOVING THE FIRST STEP

The framing here was the sharpest line of the session: the biggest barrier is not the technology, it is the first step. Against what he called the old way, high upfront integration cost, months of commercial negotiation and complex technology slowing go-to-market, Xylen positions integration as free with no upfront cost, live in minutes rather than months, on a revenue share so the company earns when partners earn, with full branding control from day one.

Worth noting for anyone evaluating this: the deck describes the white label route as low cost and minimal integration cost, while Mustafa twice said in the session that there is no cost at all. Prospective partners should confirm which applies to their case.

FREE ESIM WITH EVERY BOOKING

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Free eSIM With Every Booking

04

A low-risk strategy to scale volume and drive top-up revenue



At Scale: API & Bulk Generation

Partners send booking data via API or script — the portal generates and distributes discount codes in bulk automatically. Zero manual effort, unlimited scale.

Why It Works

- ✓ Low risk — cost covered by agent
- ✓ Every booking = one eSIM distributed
- ✓ Free eSIM drives top-up revenue

WHAT COMES NEXT

When you say partnership, do you mean partnership with a mobile operator, or with travel businesses and OTAs?

Travel businesses. Xylen works B2B and its partners work B2C. The partners are the touchpoint with the traveller, and Xylen does not deal with end users directly. Mustafa described his own role as bringing more partners in so they can offer eSIM to their existing customers.

If integration is free and there is no upfront cost, where does Xylen's revenue come from?

Not from the first sale. The model is a revenue share in which the company earns when its partners earn, and the return sits after the initial transaction rather than in it. Xylen puts the value of eSIM data top-ups at three to five times the initial purchase, which is why top-ups are built into all three deployment routes, and the permanent eSIM proposition is aimed at converting one-off buyers into repeat ones.

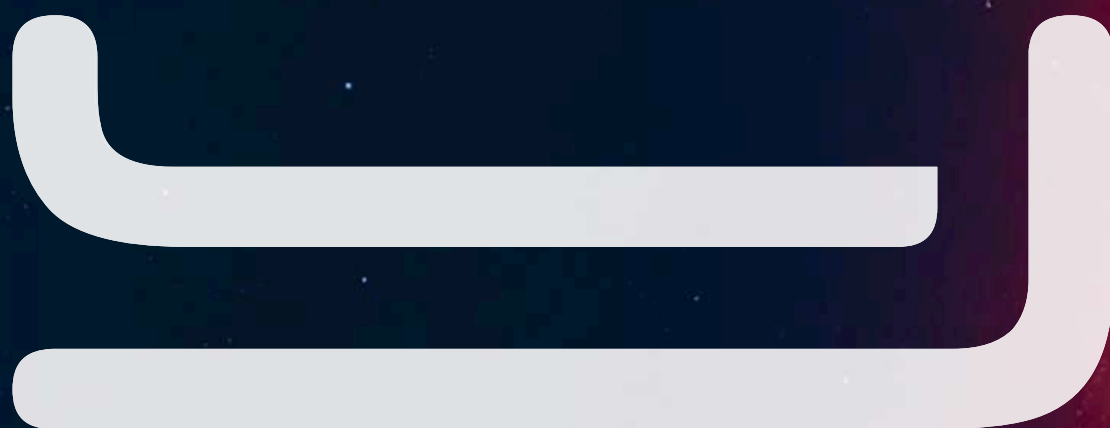
Partners buying through the wholesale portal purchase at volume rates and set their own retail margin on top, and the cost of any free eSIM given away with a booking is drawn from that partner's own pre-funded wallet.

What does a travel business actually need in place before it can start selling?

That depends on which of the three routes it takes, and the three exist precisely so the answer can differ. API integration requires development work, supported by full documentation, webhooks and dedicated technical onboarding, with go-live measured in days. The white label portal requires no development at all: brand, domain, pricing and product catalogue are configured and the portal launches in minutes. The wholesale portal requires no technical integration whatsoever, which is why Mustafa pointed to hotels, resorts, tour operators and cruise lines as its natural fit, since an eSIM can be sold at check-in as a premium add-on without touching any system.

CONCLUSION

The through-line of this session was not the technology. eSIM works, coverage spans more than 190 countries, and activation is instant. What has been missing is a route to the traveller that does not require a separate marketing spend, and a first step cheap enough that a busy travel business will actually take it. Xylen's answer is to remove cost and negotiation from the front of the relationship, put three deployment options at different levels of technical commitment behind it, and take its return from top-ups and repeat purchases rather than from the first sale. Whether the permanent eSIM arrives as described remains, on the company's own account, a question for its technical roadmap.



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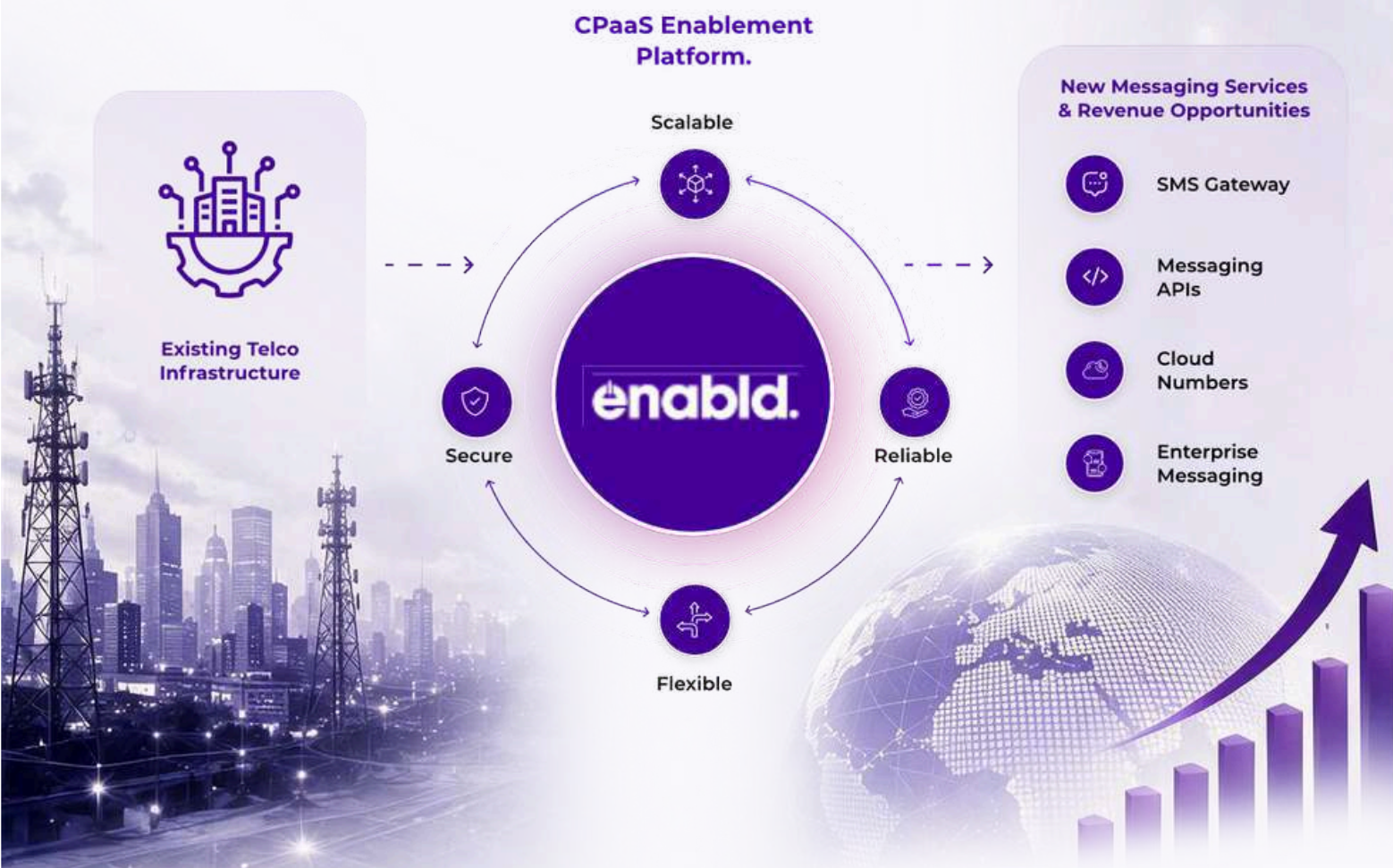
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ONE
MARATHON
A GLOBAL
COMMUNITY

Different Perspectives, a Stronger Industry

430+

Session
Registrations

38

Companies
Represented

31.55%

Average email
Open Rate

280+

Minutes of
Expert Content

25K+

LinkedIn
Impressions

9.25/10

Participant
Rating

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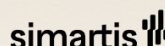
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