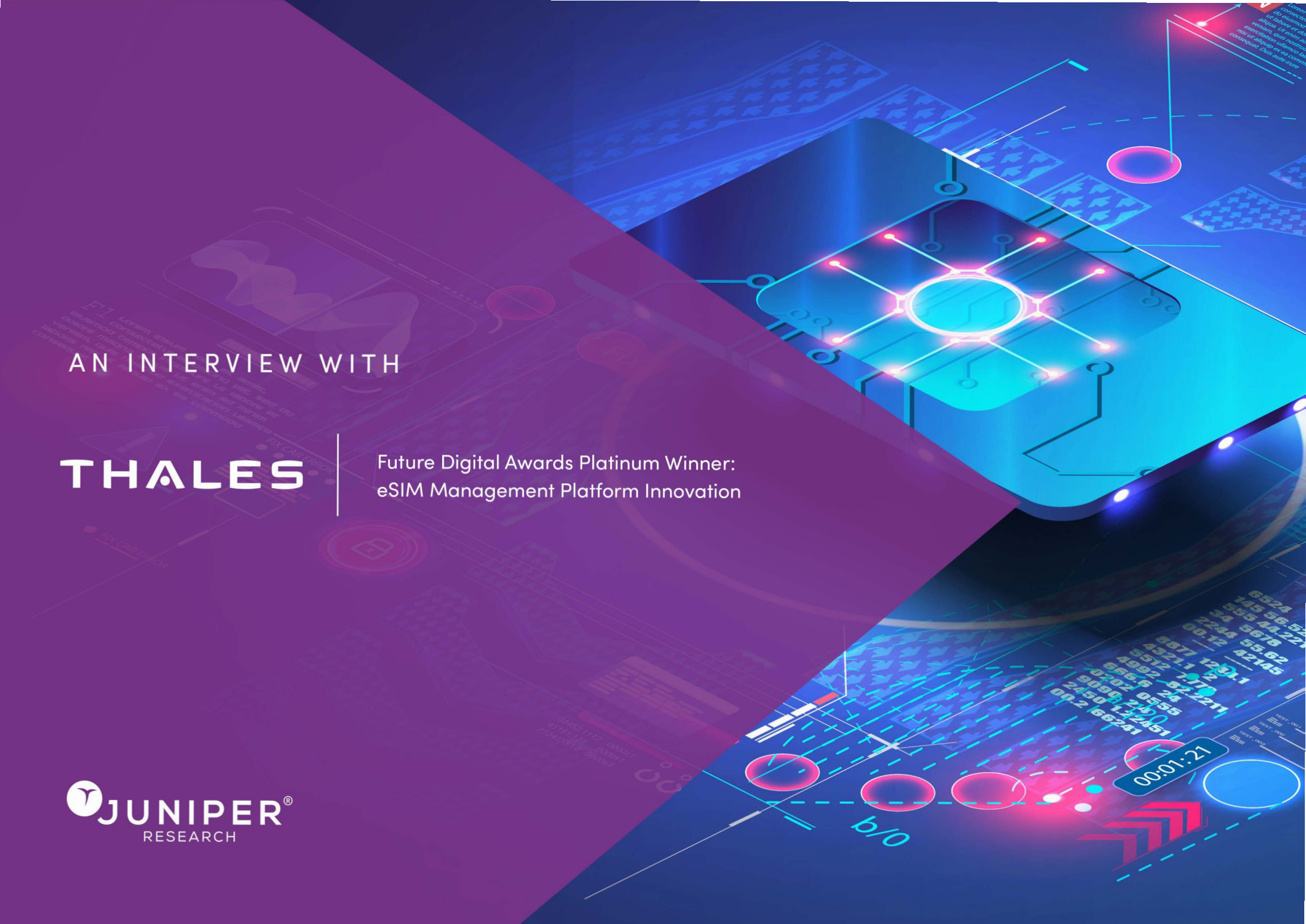
AN INTERVIEW WITH

THALES

Future Digital Awards Platinum Winner:
eSIM Management Platform Innovation



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1.1 Mover & Shaker Interview with Thales, Future Digital Awards Platinum Winner of eSIM Management Platform Innovation

Juniper Research interviewed Stephane Quetglas, Marketing Director at Thales Digital Identity & Security, in October 2024.

1.1.1 What role does Thales play in helping companies scale and simplify their IoT deployments globally?

While we provide a complete portfolio of solutions to manage cellular connectivity for IoT devices, including services and eSIM products, it is important not just to consider the management of the software, but also the hardware products that come with it.

Scalability is key in the IoT market. We see enterprises willing to deploy more and more large fleets of devices to reap the full benefits of IoT.

During the initial build phase, the OEM designs and manufactures the devices. Thales helps these OEMs with the capabilities for cellular connectivity by offering a broad range of eSIM products that enterprises can integrate into their devices with the connectivity provider of their choice.

Devices are deployed and operated during the run phase. Here, Thales provides enterprises with the services that enable them to securely manage cellular subscriptions during the lifecycle of devices.

These services automate the management of large fleets of devices and enable the use of connectivity from hundreds of connectivity providers or network operators globally.

1.1.2 Can you explain the key benefits that Thales' IoT services offers to businesses looking to enhance their connectivity usage?

Enterprises can benefit from our products to make things easier when it comes to connecting devices with cellular technology. Our objective is to provide a simple approach to cellular connectivity, with full flexibility, both in the build phase of the device and while operating in the field.

Before the arrival of eSIMs, enterprises had to choose a connectivity provider and obtain a SIM from them. Then enterprises needed to create several variants of their product to serve different markets, hence the need to manage costly multiple SKU (stock keeping units). Additionally, changing connectivity providers required sending field technicians to replace he SIM which is expensive and very inefficient.

Now, it is possible to go for a single SKU by leveraging the flexibility provided by eSIM. Moreover, once devices are on the field, enterprises can change providers without having to send out field technicians which is clearly a much simpler approach.

1.1.3 How does Thales ensure the reliability of its IoT connectivity management services?

I think it is a combination of technology and experience: The key aspect is that we master both the eSIM products and the remote management services. Thales is greatly experienced in security certification, and it's at the core of our business offerings. It is important to bear in mind that these products need to be certified; specifically from a security standpoint. This ensures the reliability of remote SIM provisioning and remote management.

Another way Thales ensures the reliability of its IoT connectivity is through the development of efficient services alongside the device hardware. We leverage our

extensive base of customers to ensure our services are able to address any device equipped with an eSIM, be it from Thales or another provider.

1.1.4 Can you provide some examples of industries that have successfully implemented Thales' IoT connectivity solutions and the impact they have had on their operations?

One of the first industries to note is automotive. We work with most major car OEMs (original equipment manufacturers) to provide them with eSIM solutions. It started with eSIMs for regulatory compliance, such as eCall. As a result, automotive OEMs have widely adopted eSIMs, allowing them to manage their connectivity providers through Thales. eCall has become one of the most widely used solutions and is now implemented in many countries.

Additionally, smart metering has become a big industry for IoT connectivity solutions. These smart meter makers wish to sell their meters in different types of countries. However, as meters are deployed at different locations, there is a need to pick the best connectivity for each meter. They can optimise their own service, and the performance of their own service and coverage, by using Thales' IoT connectivity solution.

Another example includes the router market, specifically more of a consumer IoT use case for fixed wireless access for 5G for home broadband. Customers buy from their mobile network operator. The 5G router is deployed and through our IoT connectivity platform, we manage the change of the profile on the router remotely and seamlessly. From there, it is a case of reverse logistics whereby the user terminates its subscription and returns the old router to the operator.

1.1.5 What future advances or innovations do you expect in the IoT connectivity management market?

Up to this point, we have talked about our eSIM solution for IoT, based on the latest IoT standard, SGP.32. This standard is not fully available in the market today, but it will mature. It will be available more widely next year and will lead to the increased penetration of eSIMs across many verticals. As mentioned, automotive, metering, and routers will benefit, but you can also add healthcare, logistics, and security solutions to the list.

1.1.6 Why choose Thales' IoT Connectivity Management solutions?

The solution we provide is very comprehensive. It starts with the hardware products, with different form factors and grades to suit individual customer needs. Additionally, we have reliable and interoperable services, including value-added services which integrate into their own devices and simplify the journey for the customer. Simplicity is a key factor in encouraging the adoption of cellular connectivity. Thales' IoT Connectivity management suite provides the standardisation, flexibility, and scalability necessary to achieve connectivity reliability. Regarding the standardisation, Thales has led the GSMA SGP.32 standard specifications, which allows for flexible eSIM connectivity across the entire IoT domain. However, Thales offers value-added services beyond just complying with these standards.

More information on Thales eSIM IoT solutions