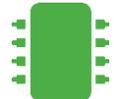


eSIM, IoT & Roaming: Helping Customers Operate Anywhere

The Channel Opportunity for MSPs & IT Resellers

Matt Atkinson | Managing Director, Utelize Mobile & SureSIM
Channel Live | 10 March 2026 | Tobacco Dock, London



I'm Speaking

CHANNEL LIVE

THE MSP & RESELLER EVENT



Matt Atkinson

Founder

Utelize

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**IoT & Roaming: Helping Customers
Operate Anywhere**

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Why Are We Talking About eSIM Now?



The Physical SIM Is Disappearing

Apple removed the tray - other manufacturers following. eSIM is the new default for smartphones, tablets and laptops.



IoT Devices Are About to Refresh at Scale

Billions of M2M SIMs locked into contracts become opportunities as hardware refreshes on new 5G standards.



Connectivity Becoming a Managed Service Not a Commodity

Corporate buyers want visibility, carrier resilience, policy control and security — not just a cheaper single network SIM



New Recurring Revenue for MSPs & Resellers

Managed eSIM creates per-device monthly revenue opportunity in UK and Internationally with high stickiness

What we'll cover: market data and opportunity, real channel models — not a product pitch

eSIM & Roaming: The Numbers That Matter



\$80Bn+

Global Roaming Connectivity Market 2025
(Travel eSIM Industry est. \$1.8Bn – 2%)



544M

eSIM device shipments
2025 (+11% YoY)



57.7%

Smartphone eSIM
penetration by 2030



38.7Bn

IoT connections
forecast by 2030



51.7%

Smartphones certified
for eSIM in 2024



4.9Bn

eSIM smartphone
connections by 2030

01 Travel eSIM The Immediate Opportunity

The Travel eSIM Opportunity



\$1.8Bn

Global Travel eSIM revenue
2025 (+85% YoY)



35%

Average saving vs
traditional roaming



> 215M

Travel eSIM users
by 2028

The roaming cost problem hasn't gone away:

- Global average roaming data costs of \$8.57/GB vs \$5.50/GB on travel eSIM (and falling)
- UK networks highly competitive, however often £1,000 / GB - £6,000 / GB in higher cost zones
- Current data capping policies simply leave travelling employees disconnected and at risk (safety and cyber on Wi-Fi)
- 2-3 day legacy network billing delay means bill shock is still a regular reality, especially in business

Consumer Travel eSIM ≠ Enterprise Solution

✗ Consumer eSIM Apps

- ✗ No pre-travel testing or deployment assistance
- ✗ No IT visibility or controls
- ✗ Personal billing & expense claims
- ✗ One-time fixed data packs
- ✗ Limited technical support
- ✗ No permanent roaming support

✓ Managed Enterprise eSIM

- ✓ OTA deployment & pre-travel testing
- ✓ Real-time usage visibility for IT and travel teams
- ✓ Post-pay corporate billing (added to network billing)
- ✓ Policy controls & spend caps
- ✓ Helpdesk-to-helpdesk support
- ✓ Permanent roaming compatible

The support gap is the channel opportunity — managed business travel connectivity as a service

02 IoT & M2M

The Bigger Long-Term Disruption

IoT Scale & the SGP.32 Game-Changer

 **4Bn → 6Bn**

IoT connections
today → 2030

 **60%**

Cellular IoT growth
2025-2030

 **H2 2026**

SGP.32 deployments
begin to scale

What is SGP.32?



First eSIM standard built for Global IoT / M2M

Previous standards need screens (SGP.22) or rigid contracts (SGP.02)



Zero-touch fleet provisioning

Manage 1 to 1 million devices centrally — no physical access needed



Eliminates vendor lock-in

Switch connectivity provider remotely without touching hardware



Lightweight protocols

Designed to support NB-IoT, LTE-M and power-constrained sensors

Why This Matters for MSPs & Resellers



Locked-In Customers Become Addressable

Billions of M2M SIMs in rigid contracts. As devices refresh to eSIM, switching cost drops to zero.



Massive New Market Opening

IoT connectivity was primarily MNO territory. SGP.32 enables MSPs & resellers to offer multi-network, multi-service managed IoT connectivity.



Beyond Smartphones & Tablets

Laptops, EPOS, trackers, telematics, connected vehicles — all becoming eSIM-capable.



Recurring Per-Device Revenue

Managed IoT connectivity = monthly per-device fees with high stickiness and lower churn than legacy mobile.

Key Takeaways



Physical SIM is dying

eSIM is becoming default across all device types



Business Travel eSIM is your quickest win

Every customer with travelling execs or teams is an immediate opportunity to add value and change the discussion



IoT/M2M is the bigger long-term prize

SGP.32 unlocks billions of previously inaccessible devices – it's the service addition to internet, WAN, Hosted Voice



Value is in managed services

Visibility, control, integration, compliance — not SIM cards and cheap mobile data



First movers win

Build the customer relationships now that become hard to displace

Once in a generation opportunity to migrate from commodity mobile network sales



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