Transforma Insights Predicts Major Shift in IoT Connection Strategies

The arrival of the new SGP.32 eSIM standard, new regulations and evolving industry dynamics, will transform the market for cellular-based IoT connectivity

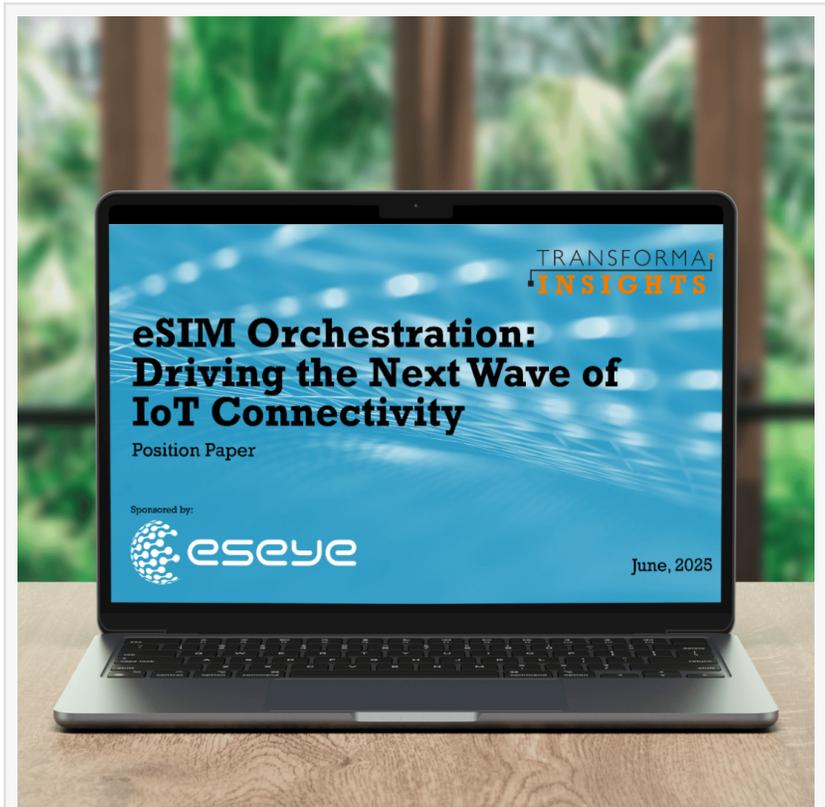GUILDFORD/READING, UNITED KINGDOM, June 3, 2025 /EINPresswire.com/ -- Businesses relying on globally connected IoT devices are facing a major shift in how these assets will need to be managed, driven by new technical standards and evolving market complexities, according to a new report released by industry research firm Transforma Insights.

Its latest analysis, detailed in a Position Paper produced in collaboration with global IoT connectivity specialists Eseye, highlights that upcoming

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technologies like the SGP.32 standard for eSIMs, coupled with more selective network operator policies, will compel connectivity providers to adopt new strategies and new specialist roles, such as an 'eSIM Orchestrator', to maintain control and efficiency.

The report indicates that the era of simple, unfettered global connectivity for business devices is evolving, presenting new complexities for businesses. The key challenges and developments driving this transformation include:

• The upcoming commercial launch of the new SGP.32 standard for remote SIM provisioning
• Mobile Network Operators (MNOs) becoming increasingly cautious about granting network access, particularly for eSIMs, seeking stronger guarantees on device security, certification, and network resource utilisation
• A complex and tightening web of international regulations concerning data sovereignty,

cybersecurity, and permanent roaming restrictions in many countries

"Enterprises are navigating a period of significant change in how global device connectivity is delivered and managed," explains Matt Hatton, Founding Partner at Transforma Insights. "The new SGP.32 standard provides a powerful tool for remote SIM provisioning. In conjunction with a more demanding regulatory and MNO landscape, our analysis points towards a fundamental shift requiring businesses to be more strategic. This is where we see the emergence of roles like the 'eSIM Orchestrator' becoming critical."

This new 'eSIM Orchestrator' function, would specialise in managing the complexities of this new environment. According to the paper, key responsibilities and characteristics of such a role would include:

1. eSIM profile management: Actively managing eSIM profile downloads and swaps according to robust policy frameworks, including service activations and cancellations.
2. Profile lifecycle management: Optimising the use of eSIM profiles to balance network availability, regulatory compliance, and commercial factors, including end-of-life management.
3. Network capability awareness: Understanding the diverse capabilities and technologies (e.g., NB-IoT, 5G SA) of various MNO networks to ensure appropriate profile selection.
4. Device awareness: Considering the capabilities and certification requirements of the IoT devices themselves, including power constraints, when managing eSIM profiles.
5. Billing simplification: Acting as a single point of billing for enterprises, handling usage checking and reconciliation across multiple MNOs.
6. Customer support: Providing unified global customer support as a single point of contact for commercial enquiries, fault resolution, and escalations.
7. Trusted relationships with MNOs: Cultivating strong, trusted partnerships with MNOs, who are increasingly selective about granting eSIM profile access.
8. Compliance with eSIM management obligations: Ensuring adherence to specific country regulations regarding eSIM localisation and data sovereignty.
9. Commercial plans/tariffs management: Managing and optimising based on the various commercial plans, tariffs, and services offered by MNO localisation partners.
10. Comprehensive managed service: Delivering these capabilities as part of a holistic managed service, simplifying the complexities of remote SIM provisioning for enterprises.

The paper suggests that this shift will move the industry beyond basic connectivity resale towards more sophisticated, managed service models. For businesses, this means that simply acquiring SIMs will no longer be sufficient; a more holistic approach to managing the lifecycle, compliance, and diverse connectivity options of their devices will be necessary.

"The way businesses manage their connected devices globally is undoubtedly transforming," adds Ian Marsden, co-founder and CTO at Eseye. "Proactive companies will be looking beyond the immediate technical changes, like SGP.32, to understand the broader operational and strategic implications. Having a clear strategy for device connectivity management, which

considers the need for specialised eSIM orchestration and unified control, will be increasingly important to de-risk operations, ensure compliance, and maintain a competitive edge."

Transforma Insights concludes that as reliance on globally connected devices grows, the current evolution in technology and market practices necessitates a significant reassessment of connectivity management strategies for all affected enterprises.

To download the full paper visit https://bit.ly/4jHbx3j.

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About Transforma Insights

Transforma Insights is a leading research firm focused on the world of IoT, AI and Digital Transformation (DX). Led by seasoned technology industry analysts we provide advice, recommendations and decision support tools for organisations seeking to understand how new technologies will change the markets in which they operate.

About Eseye

As a global leader in IoT Connectivity and eSIM Orchestration, Eseye empowers Enterprises and MNOs to deliver high-performing global IoT. We provide the expertise to integrate, manage, and orchestrate IoT connectivity for any scale or complexity, intelligently optimizing connections to millions of devices across 190 countries, leveraging over 800 networks all with near 100% uptime.

Our innovative eSIM Orchestration technology offers advanced federated localization, enabling MNOs and Enterprises to seamlessly manage eSIM profiles across regions and platforms, ensuring global scalability with localized precision.

With decades of delivery for companies like TELUS, AT&T, MTN, Amazon, and Shell, we provide resilient, fully managed, and future-proofed IoT connectivity for lasting success.

Nobody does IoT connectivity better.

Learn more: www.eseye.com

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