

GSMA
Intelligence



Webinar

Entitlement Server for Scalable eSIM Provisioning & Secure Mobile Identity

9th April 2026

Tapping monetisation from all angles

Entitlement Server impact and ‘why now’

DATE

April 2026

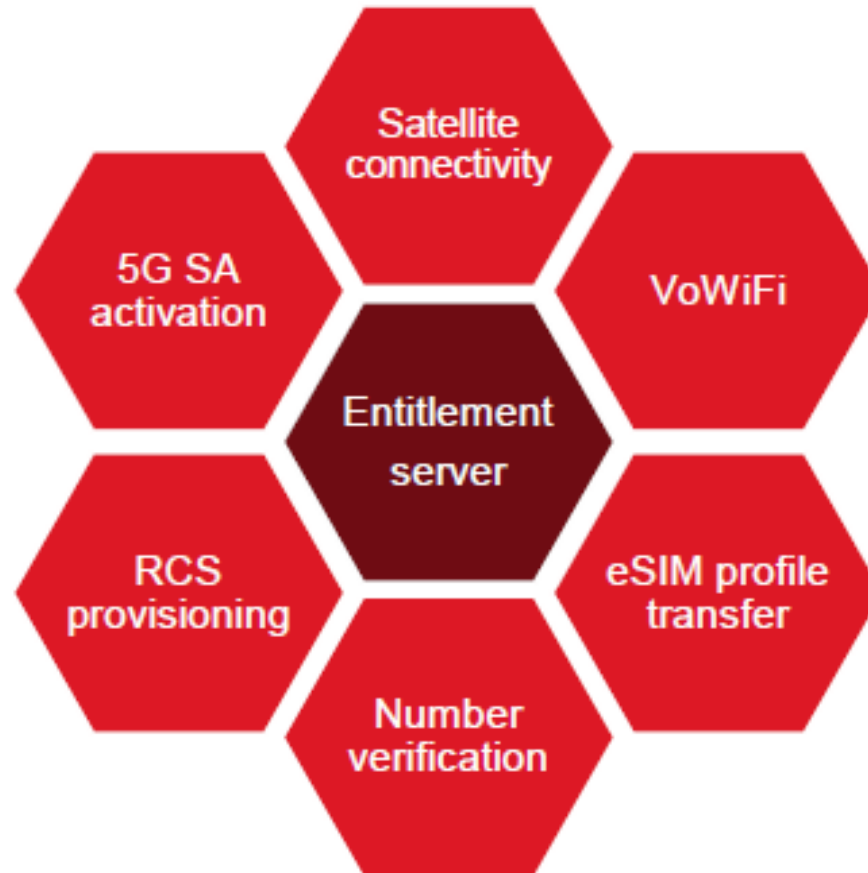
Tim Hatt

Head of Research and Consulting

A base route to multiple monetisation routes

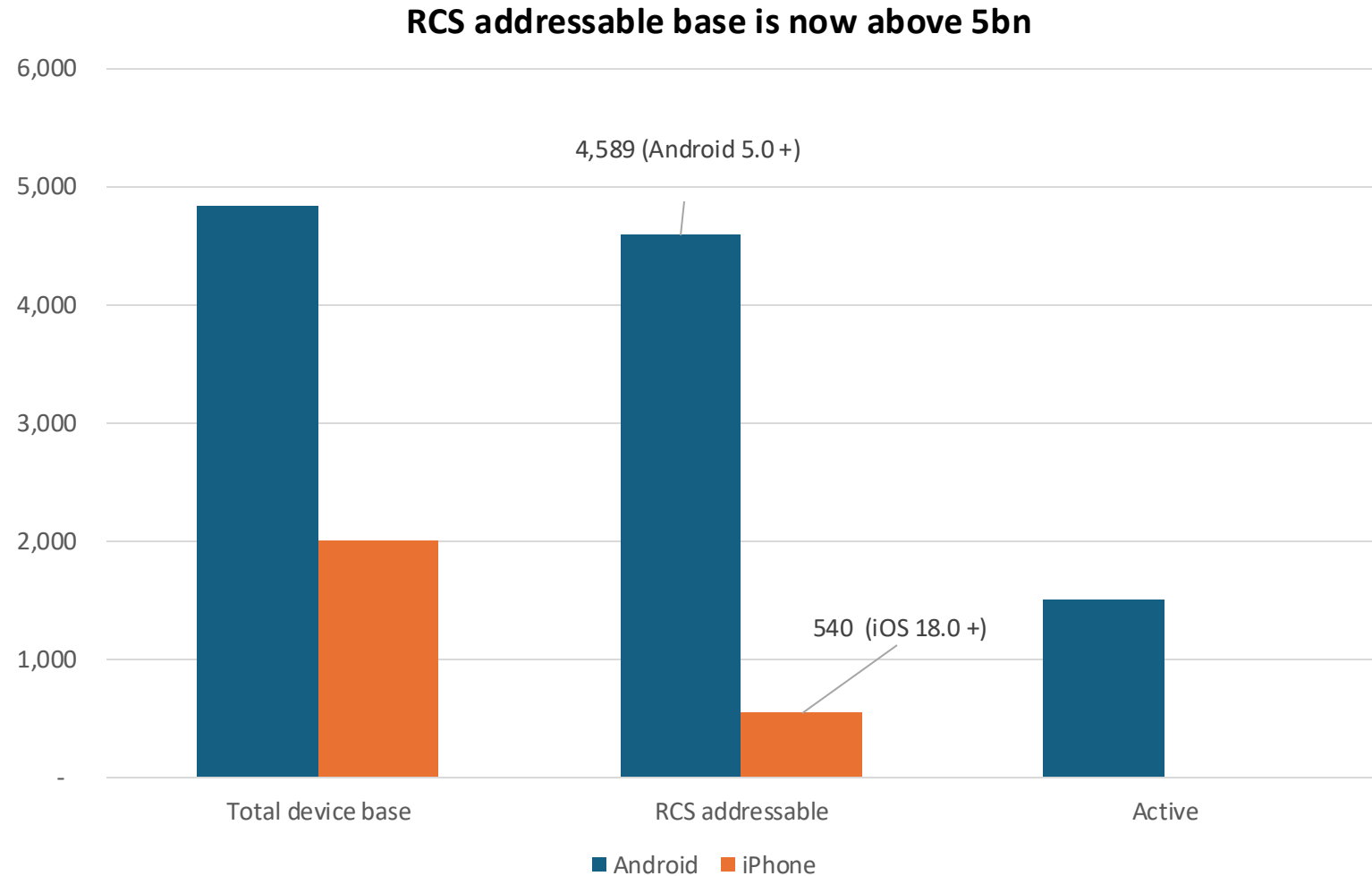
- ES = gateway to multiple device categories
- RCS is an anchor point, but use cases run the gamut (e.g. eSim, phone number verification, 5G SA)
- Necessity more than an option...and a competitive window to act within
- Impact measures
 - Cost reductions and efficiencies
 - Device provisioning (15-20%)
 - Fewer support tickets (20-40%)
 - Revenue uplift
 - D2D satellite (15-25% ARPU uplift on current pricing)
 - Slices (variable)
 - Churn and satisfaction

Applications underpinned by ES span the gamut



RCS. Apple's entry and the halo effect

- Messaging continues to diversify
- Multiple RCS selling points (ubiquity, brand engagement, security)
- Apple's halo impact still in play. RCS addressable base over 5bn people
- ES is the link factor

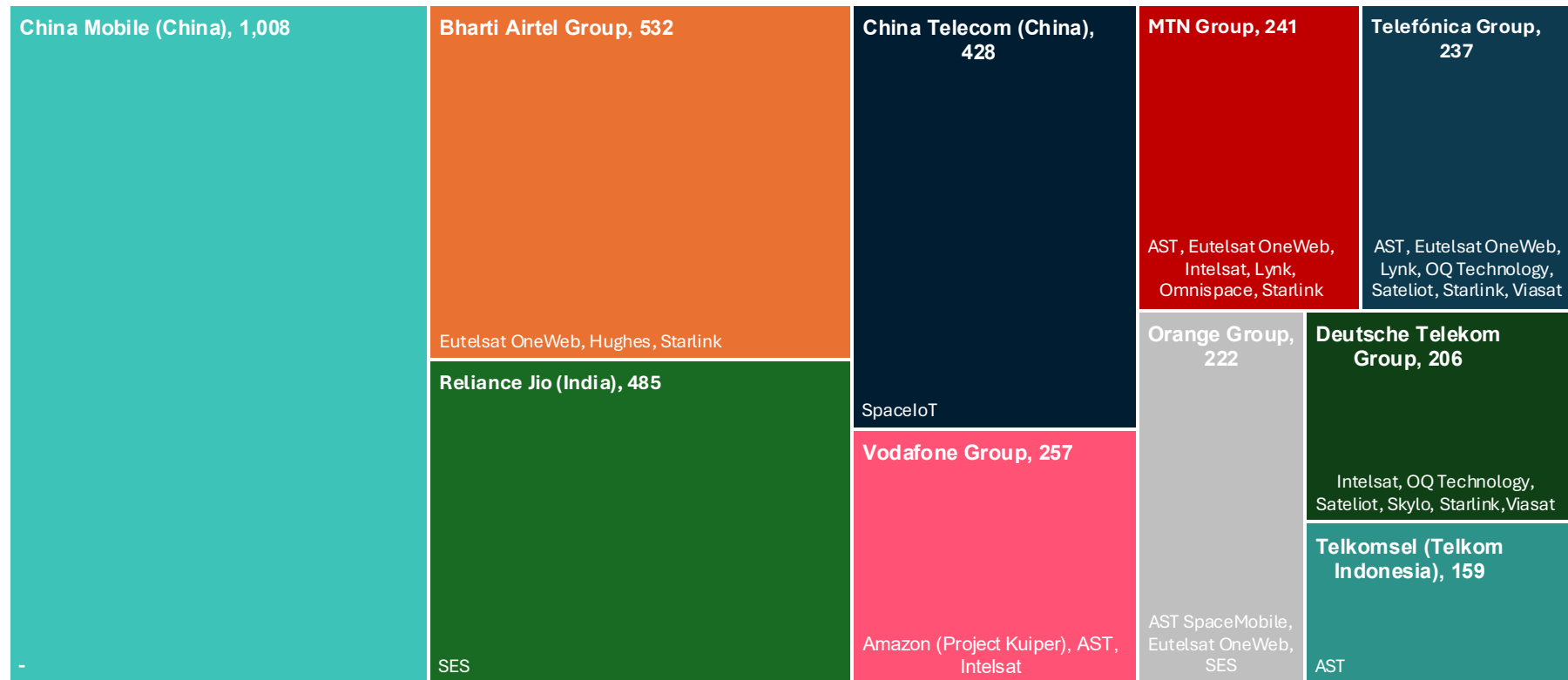


Source: GSMA Intelligence

Satellite. 70% of telcos are in = addressable base of 5bn+

- Sector momentum continues. 70% of telco market share involved, all regions
- D2D is main driver, with revenue upside in 3 segments totalling \$30bn by 20235
 - Consumer (approx. 65%)
 - B2B and IoT (approx. 30%)
 - Gov't and defence (approx. 5%)
- ES value prop?
 - Improves speed to market
 - Cost efficiencies of linking terrestrial and satellite networks

Mobile subscriber footprint of telcos with a satellite partnership is now over 5bn



Source: GSMA Intelligence

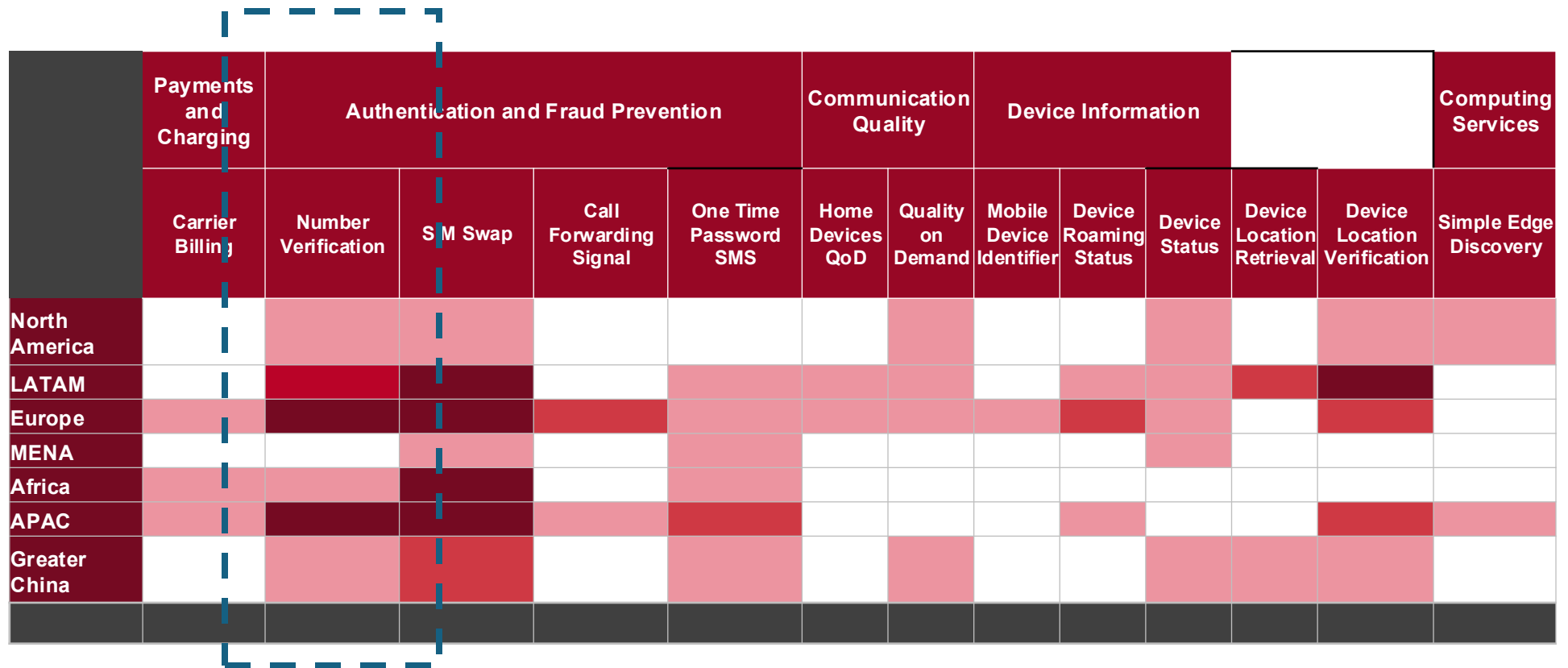
Phone Number Verification (PNV). Complementary assets

Number verification and other security purposes are among the most commonly deployed Open Gateway APIs so far

- Alternative to SIM-based authentication

- Why?
 - Security focus
 - Plays to API synergies
 - Seamless process

- Staying power



Source: GSMA Intelligence based on Open Gateway API deployments reported by telco operators

Key takeaways

What...

How...

Business impact

1

Revenue expansion = ES opens door to multiple service opps – not a single RoI bet

- RCS
- Satellite/D2D
- Slicing
- eSim + others

- Moves to platform-based recurring revenue across multiple verticals
- Improves top-line diversification and reducing reliance on core connectivity

2

Cost efficiencies and margin expansion

- Device provisioning
- Support tickets
- Security and authentication

- Reduced opex
- Improved gross margins
- Breaks 'scale trap' where costs rise with revenues

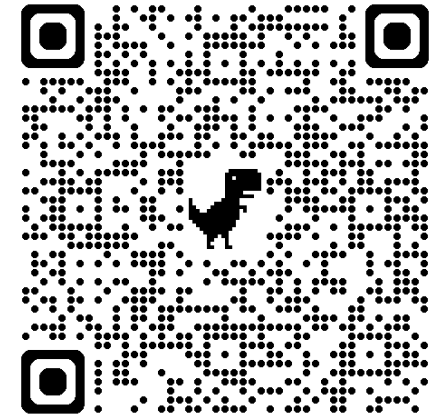
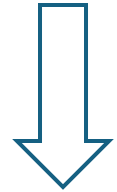
3

Time to market

- Service integration
- Capitalise on ecosystem realignment (RCS with Android and now Apple)

- Faster lead times to test new revenue streams
- Competitive advantage from first movers

Check out our latest analysis (March)



Android

Android Network Ready

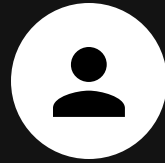


**Every user deserves a premium,
consistent experience regardless of
their device or carrier.**

Android Network Ready is a new program from Google opening up the world of Android for even more carriers



Connecting carriers to entitlements unlocks revenue, features, and customer satisfaction



Monetization opportunities open up with access to key services.



Entitlement servers mean potential reduction in customer services inquiries.



Customers care about RCS & satellite provides peace of mind.

So how does it **work**?

Solution Components



Android Platform

Delivering native OS-level support across billions of devices globally.



Entitlement Server

Intelligent, dynamic bridge between the user's device and your backend or IT/BSS components.



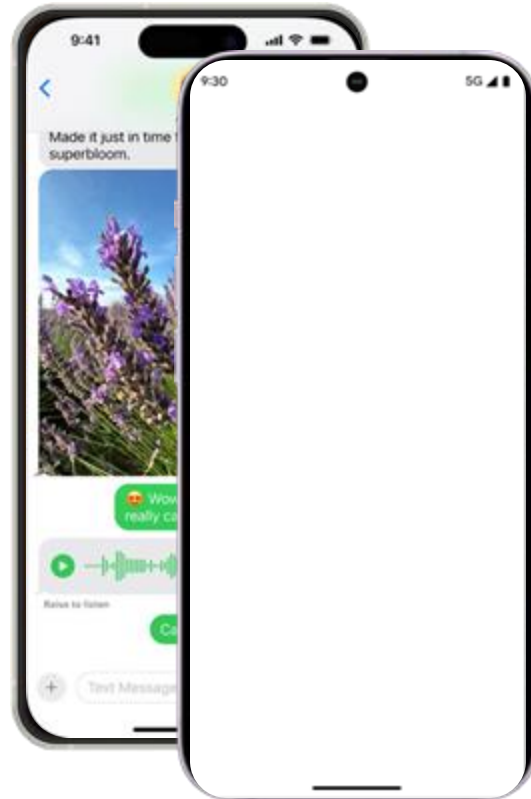
Standards (TS.43)

The GSMA industry standard specification ensuring universal compatibility.

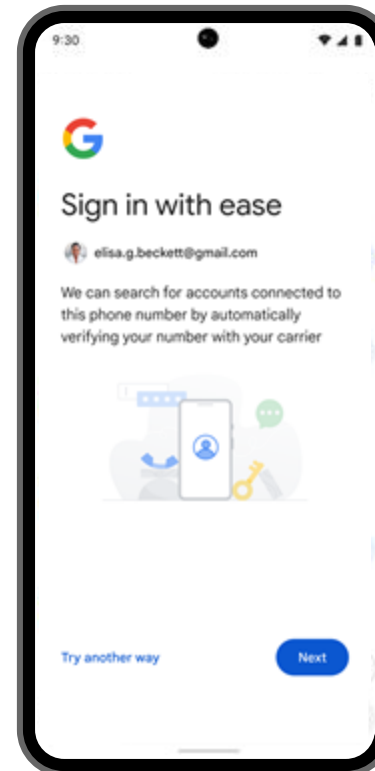
eSIM Transfer + eSIM for Wear



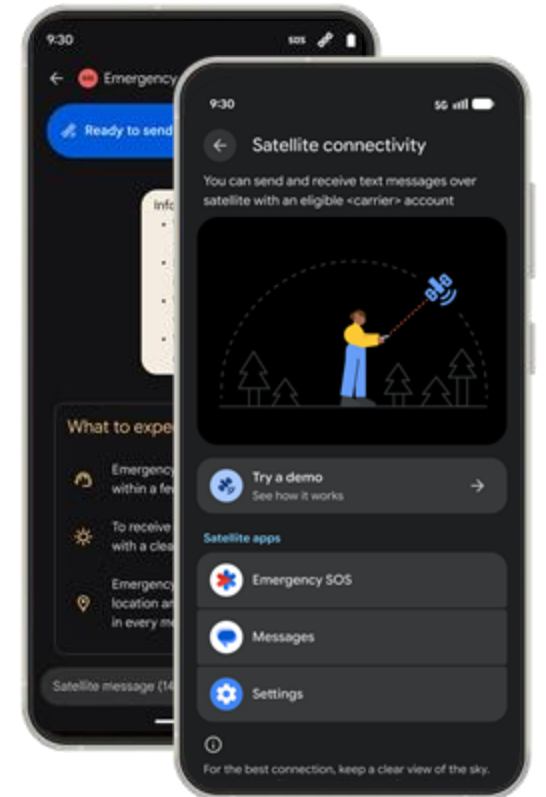
Carrier Provided RCS



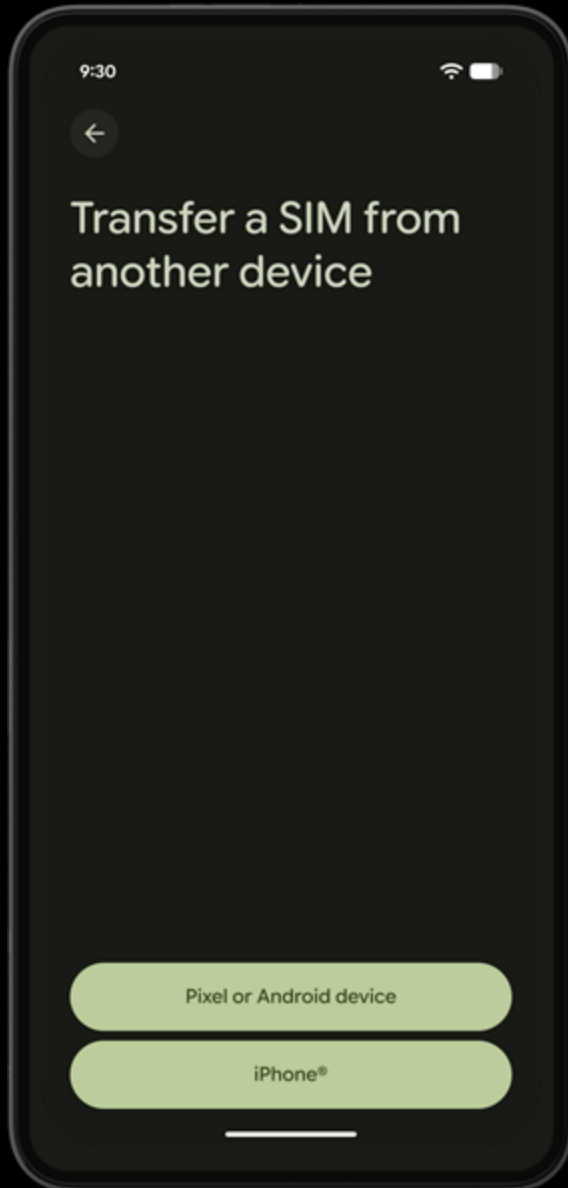
Phone Number Verification



Satellite Connectivity



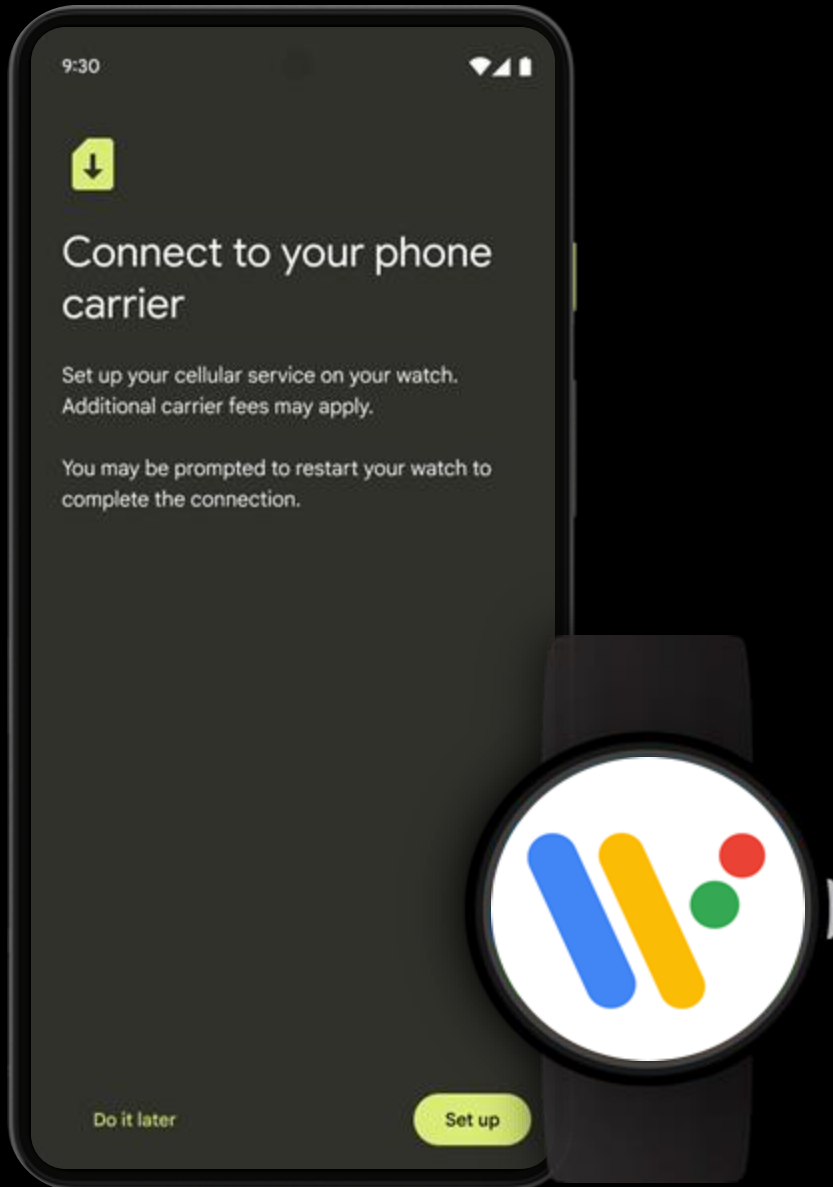
eSIM



eSIM Transfer

(appID: ap2009)

- ✓ **Spec:** TS.43 v13 (Primary ODSA)
- ✓ Android to Android SIM transfer
- ✓ Cross Platform SIM transfer
- ✓ On-device pSIM to eSIM conversion on Android



eSIM Activation

(appID: ap2006)

- ✓ **Spec: TS.43 v13 (Companion ODSA)**
- ✓ **Companion app based eSIM activation on wearable devices**
- ✓ **Support Family Number, Shared Number and Different Number flows**

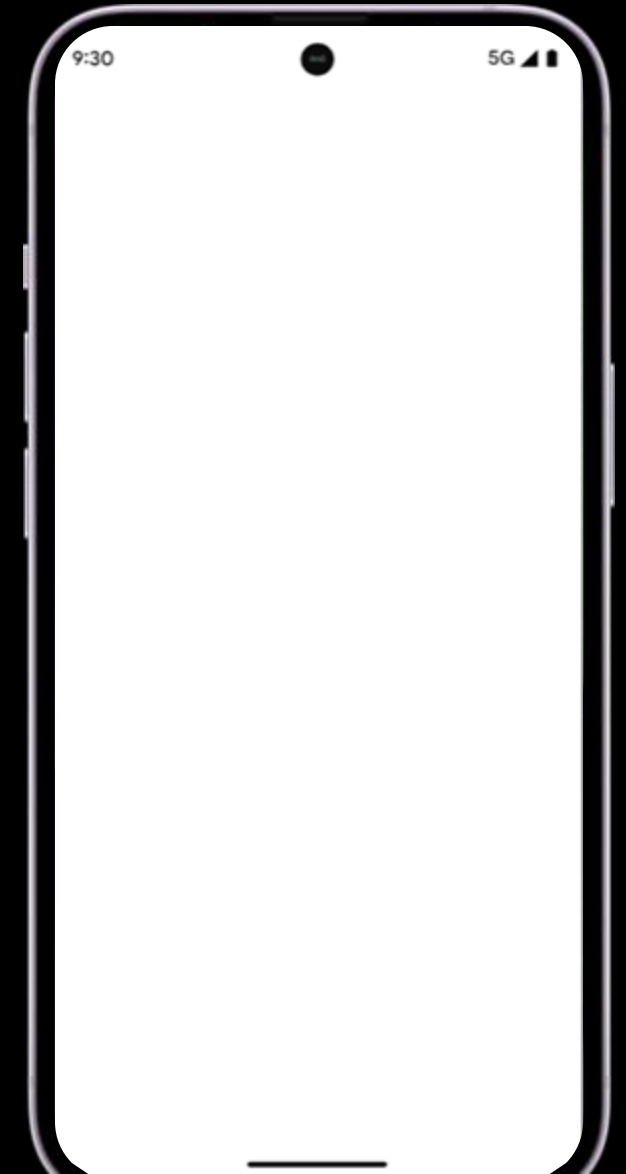
RCS



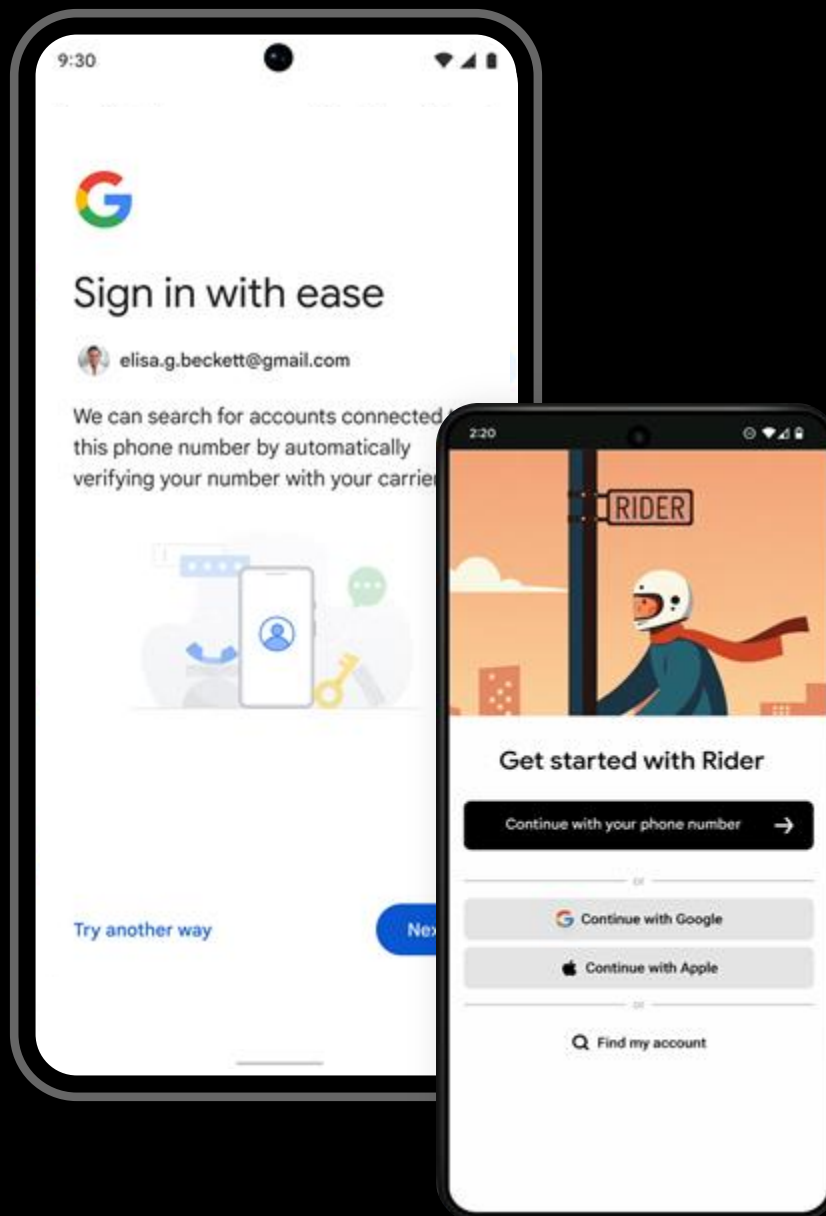
RCS

(appID: ap2014)

- ✓ **Spec:** Universal Profile, RCC.14 and TS.43 v13
- ✓ Click-to-accept Agreement
- ✓ Carrier terms of services
- ✓ RCS for Business
- ✓ CDRs and Executive Dashboards



Phone Number Verification

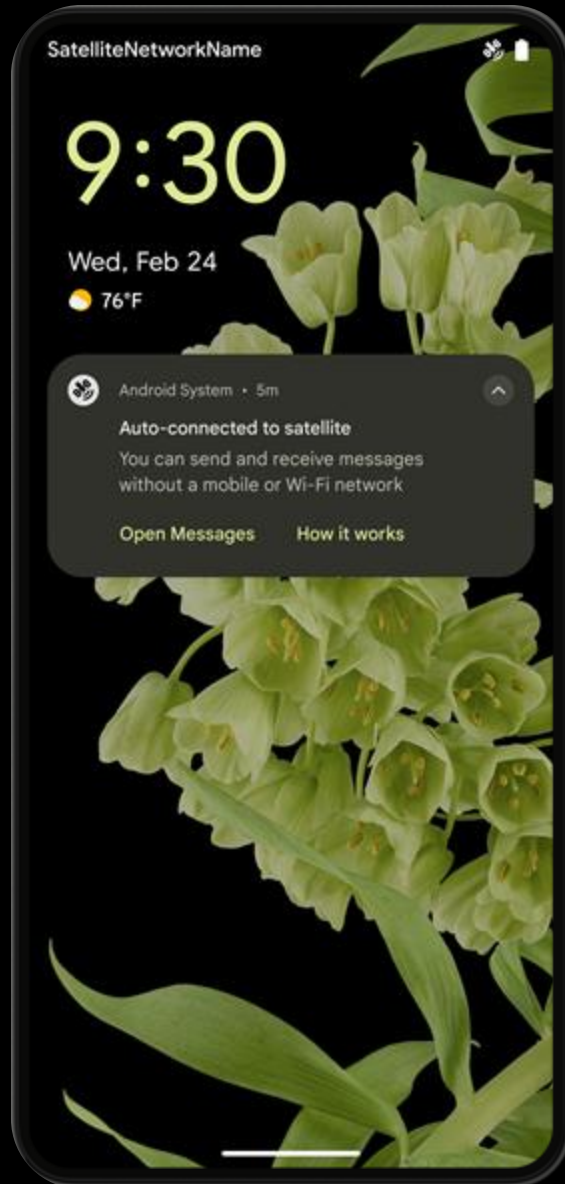


Phone Number Verification

(appID: ap2014)

- ✓ **Spec:** TS.43 v13 and CAMARA NV 2.1
- ✓ **Android-wide support**
- ✓ **Supported over Mobile data and Wifi**
- ✓ **Works with web apps**

Satellite



Satellite

(appID: ap2016)

- ✓ **Spec: TS.43 v13**
- ✓ **Control Access; Drive Revenue; Maintain Network Health**
- ✓ **Optimized Devices for constrained data access, background data and Satellite specific UI**
- ✓ **RCS* support including RCS with Gemini**
- ✓ **Lite data**

How do I participate?

Be a part of our white-glove pilot

Phase 1

Interests Intake

Review the requirements and submit your details through the intake questionnaire.

Target timeline: 4-8 weeks

Phase 2

"White Glove"

Onboarding

Google support to guide your integration, testing, and validation against TS.43

Target timeline: 2-5 months

Phase 3

Network Go Live

Achieve certification and seamlessly deploy premium features to billions of Android users.

Get started today

Scan QR code

https://docs.google.com/forms/d/e/1FAIpQLSeOCvzjm7zs5LFb33tHCzUFaK3nrqAtjYoWy5NZiEuekNKI9Q/view_form



Daniela Almeida

Head of Core & Platform Technology
Open Gateway Network Lead



Telefónica: Enterprise buy-in for SIM-anchored identity is real



Challenge: 5G introduced a Service-Based Architecture designed to scale service exposure and interoperability. Now, it's the architectural shift to recurring revenue through a trusted, standardized identity layer.

Solution: Entitlement Server + SIM-based authentication, exposed to enterprises via GSMA Open Gateway and CAMARA APIs.

- **Identity:** Number Verification replace SMS-OTP — frictionless for end users, standardised for enterprise buyers;
- **Service activation:** From eSIM activation to enterprise identity, RCS provisioning, and 5G slicing;

CAMARA and TS.43 standardization enables Telefónica and other telcos to scale across industries through simpler integration and stronger ecosystem adoption.

eSIM Evolution with Entitlement Server



Why the industry needed a common activation language

Ecosystem fragmentation

Different devices, operating systems and operator integrations created **inconsistent activation logic** and exception handling.

Operational scale

Without a common flow, conversion and transfer relied more heavily on QR codes, assisted channels and **customized** backend work.

Security and reliability

The industry needed a standard way to authenticate the **line, validate eligibility and trigger the correct order** without exposing credentials to the user.

Interoperability pressure

Before standardization, the same eSIM journey could **behave differently** depending on device, channel and carrier backend.

eSIM Evolution with Entitlement Server



Physical SIM to eSIM

Convert the active line on the same device into an eSIM from the handset settings or app.

Device-to-device transfer

Move the subscription from a source device to a target eSIM-capable device with carrier validation.

New eSIM activation

Start a new profile activation digitally via app, settings or QR-based flow.

Wearables

Support wearable-device journeys where entitlement and policy must be checked before activation.

Service add-ons

Enable VoWiFi, VoLTE, SMSoIP or data-plan related entitlement/configuration use cases.

Same entitlement logic, multiple commercial journeys

Why operators care




The commercial front end can vary by OEM and channel, while the entitlement logic stays more stable and reusable.

Why OEMs care


A standard server-side interaction reduces custom exceptions and makes native device journeys easier to scale across carriers.

RCS Massification Strategy

RCS is an evolution of messaging services, creating an ecosystem where enterprises can engage with customers in a richer, more trusted, and more conversational way. Its value comes from:


-  Enabling verified brand profiles with official names, logos, and business information, increasing trust and credibility;
-  Supporting more interactive messaging experiences;
-  And from enabling more visual and action-oriented campaigns.

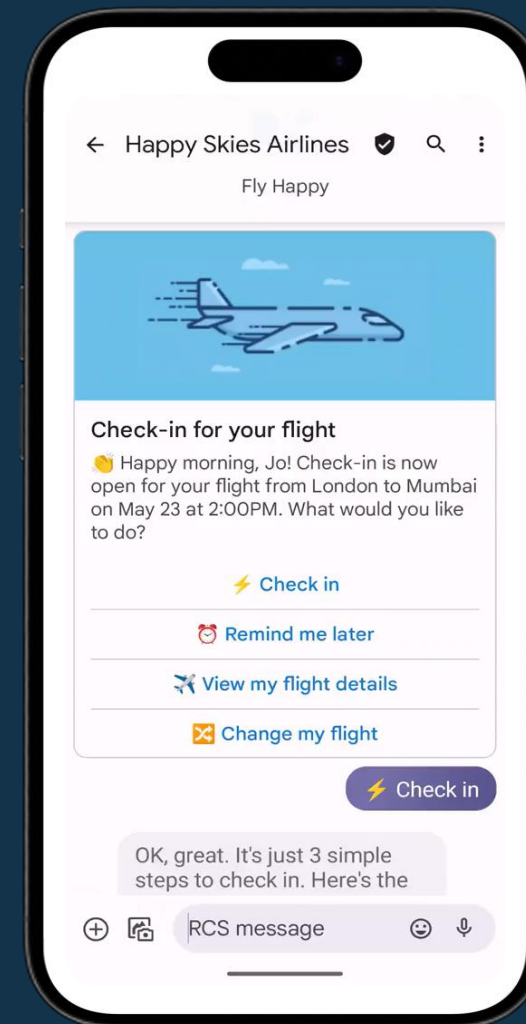
The need to evolve the RCS service provisioning model came from the strategy to scale the channel and turn it into a meaningful revenue-generating platform.

 BR: Launched RCS provisioning with TS 43 for both Android and Apple.

 SP: Launched RCS provisioning with TS 43 for both Android and Apple.

 GE: Launched RCS provisioning with TS 43 for both Android and Apple.

 GE: Soon to be launched TS 43 flow.



Number Verification Evolution



Objective: To offer a Silent Secure Authentication

We use a simple, secure and silent authentication almost every day in our phones:
Users daily enjoy a secure, transparent and automatic connection to their carrier network.

Why can't their digital services do the same?

A. IP Mapping API:

Uses device connection data to validate the phone number with the app.
+ Simple, no OS dependency, easy to integrate
– Not reliable on Wi-Fi or VPN connections



Already in production, pending certification



Already in production, ongoing certification.



Already in production, and certified.



Dev on going.

B. OS-privileged SIM authentication

Uses operating system mechanisms for privileged carrier services.
+ Strong SIM-based trust, works across Wi-Fi, roaming, and SIM-enabled devices
– Complex, OS-dependent, and limited to carrier/OEM-controlled integrations

C. SMS OTP

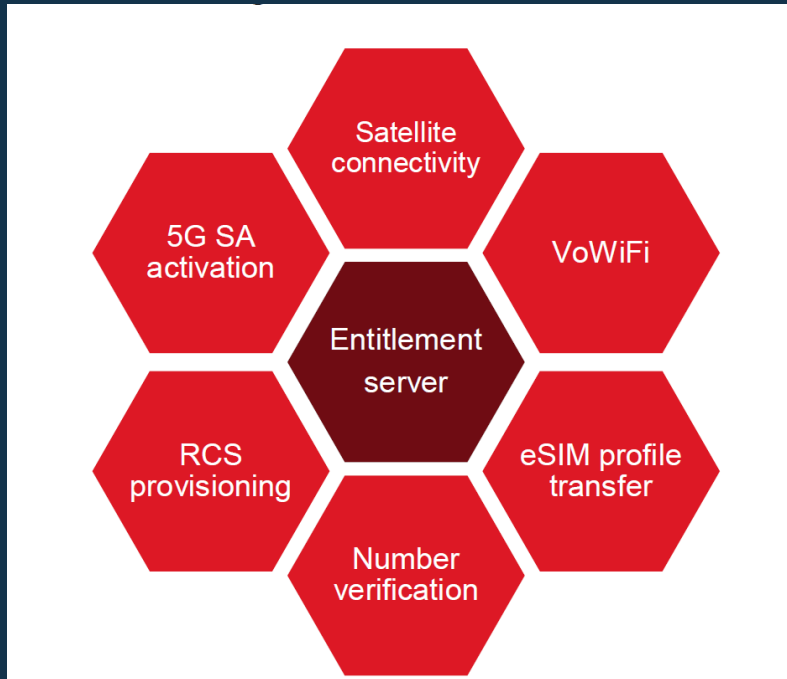
Uses a one-time password sent by SMS to prove control of the line.
+ Widely available, easy fallback, works across devices and channels
– High friction, weaker UX, and more exposed to phishing, interception, and SIM-swap-related abuse

D. Operator Token + Number Verification

Uses an operator-issued SIM-based identifier that can be consumed by third-party apps.
+ Reusable, silent, stronger security boundary, no direct MSISDN sharing
– Requires operator-side token validation and common ecosystem support

Importance of Entitlement

Identity & Trust to Customer Experience



- ▶ Operators must manage not just access, but identity and trust across devices & services
- ▶ This is where an entitlement server becomes critical



Device



motive

Entitlement Server



Operator Network



The Shift to Entitlement-Driven Networks

- It's the foundation for richer services and experiences
Seamless, real-time, and secure
- The anchor for fraud prevention and security
Eliminate SIM fraud, fake provisioning, and identity misuse
- Unlock new revenue & digital identity use cases
Offer enterprise services and advanced connectivity
- It's a global industry shift. Not early adoption anymore!
Operational backbone of modern networks & converged services
- Clear economic and strategic upside
Lower OPEX, higher ARPU, and rapid growth
- Investment in ES → Market leadership



- ▶ Entitlement Server ensures secure identity, **service innovation**, and sustained market leadership

Deployment Options for Entitlement Server

Flexible deployment and commercial models to fit operator needs.
It cannot be a one-size-fits-all approach.

Regardless of the choice, make sure the solution supports geo-redundancy, high availability, performance and scale

Entitlement as a Service (SaaS)

- Turnkey solution
- Pay-as-you-grow
- Minimal business risk
- Lower operational overhead
- Aligns with an OPEX model

On-premises (or Cloud) Deployment

- Aligns with a Capex model
- Control over license, regulatory & compliance
- Operational Control
- Customization & Flexibility
- Also, can be run as managed service

Key Operator Considerations

Vendor reliability & roadmap:

- Strong support, regular updates, and alignment with industry standards.

Faster time to market:

- Market is changing rapidly. Are you the first to launch new features in the market?

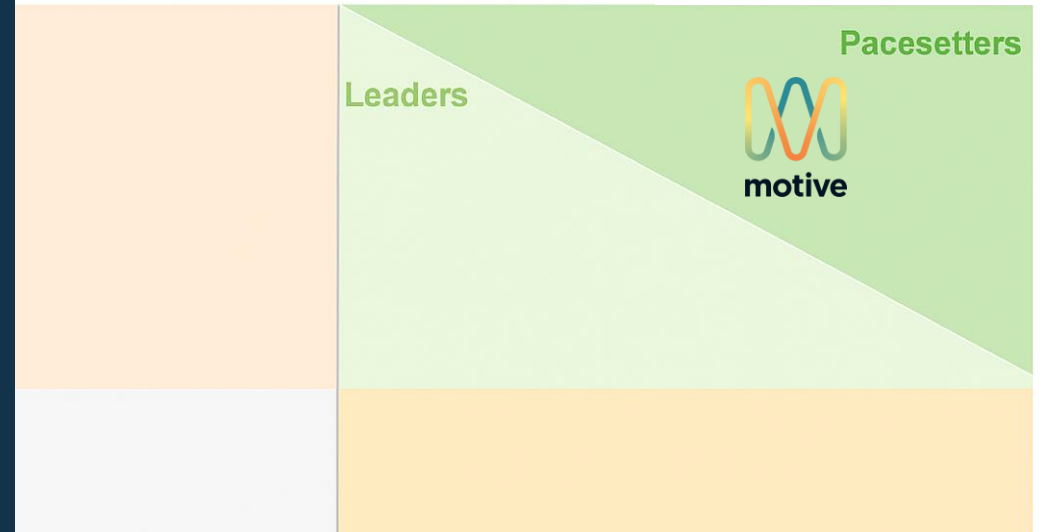
Integration flexibility:

- Supports multiple OSS/BSS systems, & streamline complex logic

Core Agnostic, Standards-based solution

- Fully integrated with Ericsson, Nokia, and Huawei 4G EPC and 5G Cores

Global Entitlement Server Landscape, 2025



Real-time entitlement

- Immediate policy enforcement and actionable insights

Scalability & performance:

- Can it handle millions of subscribers and peak loads?

Android Network Ready alignment

- Premium Android services for wider global operators. Streamlined integration & onboarding



Motive is the industry leader in device management and mobile entitlement

>1.8B

Devices under management

Entitlement - Pacesetter

Recognized Leader in Entitlement Services

>120K

Devices models recognized

>10M

Self-service sessions enabled per month

Thank you!

