



SOLUTION BRIEF · FOR MOBILE NETWORK OPERATORS

SGP.32: turning a threat into an opportunity for MNOs

The GSMA's new IoT eSIM standard loosens customer lock-in – but it also opens a high-growth managed-services market. Here's how operators can lead it rather than lose to it.

MARKET
IoT eSIM connectivity

BY 2030
1.7B connections · >\$26B revenue

FOR
Mobile network operators

— THE CHALLENGE

What SGP.32 means for MNOs

The GSMA's SGP.32 standard is a major shift in Remote SIM Provisioning (RSP), giving enterprises far greater control over their IoT connectivity. Unlike SGP.02 (M2M) and SGP.22 (Consumer), SGP.32 lets enterprises switch connectivity providers without requiring MNO approval.

286M → 1.7B > \$26B

Active IoT eSIM connections, 2024 to 2030 – with SGP.32 emerging as the de facto IoT standard.

Forecast IoT eSIM connectivity revenue by 2030 – a market open to proactive operators.

Source: Kaleido Intelligence.

While this enhances enterprise flexibility, it also presents significant risks for MNOs:



Loss of customer lock-in

Enterprises can change connectivity providers freely, reducing MNO control over the relationship.



Interoperability & security

Smooth profile migration demands seamless integration and compliance with stringent security protocols.



Revenue disruption

Traditional roaming-based revenues are at risk as enterprises localize profiles for cost savings.



Regulatory complexity

Compliance with permanent-roaming restrictions adds new operational challenges.

— THE OPPORTUNITY

A new tool, not a universal solution

SGP.32 isn't a one-size-fits-all answer for IoT connectivity – it's a new tool MNOs can leverage. With IoT eSIM connectivity revenue forecast to exceed \$26 billion by 2030, operators that proactively adopt SGP.32-based managed services will capture a significant share of this high-growth market.



Capture new revenue

Offer managed eSIM services and monetize enterprise connectivity instead of losing it to alternative providers.



Retain enterprise customers

Keep customers inside your ecosystem with flexible, enterprise-friendly IoT connectivity.



Move first

Establish a first-mover advantage as SGP.32 becomes the de facto standard for IoT.

ANALYST INSIGHT · TRANSFORMA INSIGHTS (2024)

“SGP.32 gives much more freedom to enterprise customers to 'at the click of a button' move some or all of their connections from one network to another. However, there are still unknowns in how this will work in practice, and it is best delivered as a managed service to address its challenges.

– TRANSFORMA INSIGHTS, 2024

— THE APPROACH

How FLOLIVE® solves the SGP.32 challenge

Flolive's cloud-native connectivity platform turns SGP.32 into a competitive advantage rather than a threat. Our agile, compliance-driven approach includes:



Hybrid connectivity model

Combine Multi-IMSI for global coverage with SGP.32-based eSIM provisioning for compliance and enterprise flexibility.



Cloud-native network management

Seamless profile switching without complex backend integration – localize profiles while maintaining security and service continuity.



Regulatory compliance & localized connectivity

Comply with permanent-roaming regulations through localized network breakouts in key markets, for uninterrupted global IoT connectivity.



Seamless MNO integration

An API-driven architecture integrates effortlessly with existing MNO infrastructure, reducing operational burden.



Monetizing eSIM connectivity

Offer managed eSIM services to retain enterprise customers and unlock new revenue streams.



CMP aggregation

A single pane of glass for end-to-end oversight – customers never leave your management portal.







Interoperability & security management

Flolive maintains commercial agreements with global profile vendors (MNOs) and handles integration and certification across SIM vendors, RSP vendors, and MNO infrastructure – eliminating the heavy lifting and ensuring robust security with minimal operational complexity.

— THE RESULTS

Business & operational benefits for MNOs

MNOs that partner with Flolive turn a disruptive standard into durable advantage:

-  **Regulatory compliance with ease**
Stay ahead of SGP.32-driven compliance mandates without disrupting existing connectivity models.
-  **New revenue models**
Instead of losing traditional roaming revenue, capitalize on eSIM-based enterprise connectivity services.
-  **Competitive differentiation**
Offer flexible, enterprise-friendly IoT connectivity to become a strategic partner – not just a network provider.
-  **Cost-efficiency**
Reduce reliance on outdated roaming models while improving IoT service delivery.
-  **Enhanced scalability**
Manage global IoT connectivity with a software-driven, cloud-native approach that eliminates operational complexity.

ANALYST INSIGHT · TRANSFORMA INSIGHTS (2024)

“*Devices managed via remote SIM provisioning will grow rapidly over the next decade but remain the minority of new connections – albeit approaching 50% by the end of it. The best approach is not to 'hit and hope' by building your own SGP.32 solution, but to work with a trusted vendor that offers a hybrid approach.*”

– TRANSFORMA INSIGHTS, 2024

— FUTURE-PROOF YOUR STRATEGY

Lead the SGP.32 shift – don't chase it

SGP.32 is reshaping IoT connectivity. Analysts predict that within the next decade it will power nearly 50% of all IoT connections. MNOs that adapt early establish a first-mover advantage; those who hesitate risk losing key enterprise customers to competitors who embrace the shift.



No vendor fragmentation

The shift from SGP.02 to SGP.32 raises vendor-fragmentation concerns. Flolive's cloud-native infrastructure eliminates this complexity, ensuring seamless integration with operators' existing networks.



Positioned to lead

Flolive's platform ensures MNOs aren't just ready for SGP.32 – they're positioned to lead the market as adoption accelerates toward 50% of IoT connections.

— DON'T WAIT UNTIL IT'S TOO LATE

Transform SGP.32 into your next business advantage

Schedule a consultation with Flolive and discover how to stay ahead of SGP.32-driven compliance, protect roaming revenue with managed eSIM services, and turn a disruptive standard into durable competitive advantage.

[Schedule a consultation](#)[Request a live demo](#)

Flolive – helping MNOs turn SGP.32 into a competitive advantage.