



Global Entitlement Server Landscape, 2025

Industry Overview and
CORE Analysis

<< September 2025 >>



- 1. Entitlement Server Definitions, Evolution and Benefits**
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This report deep dives into the eSIM landscape, covering the evolution and adoption trends. It also explores the competitive landscape wherein Counterpoint has used its proprietary CORE (COmpetitive Ranking and Evaluation) framework to help the industry better understand and identify key players driving the thriving eSIM ecosystem. The deep-dive analysis and evaluation focus on the relevant capabilities based on several interviews with different players. It showcases their strengths, ecosystem reach, and several other criteria.

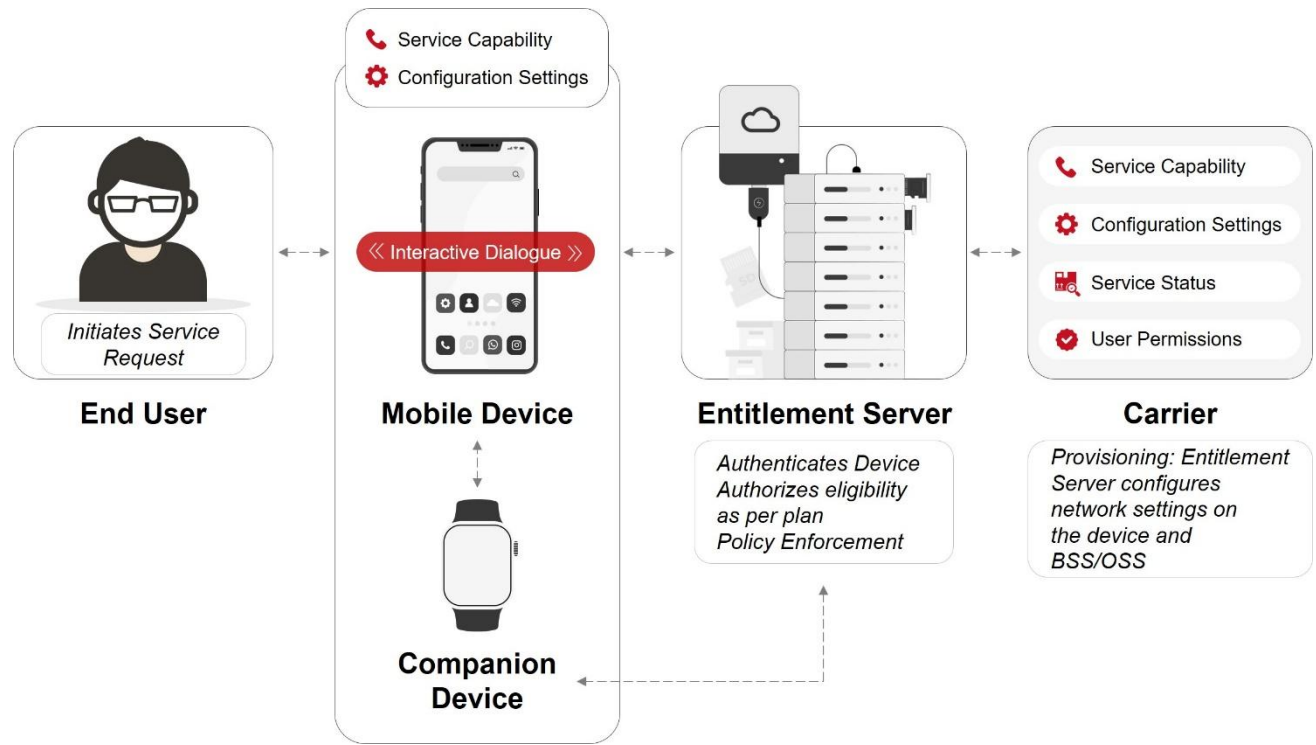




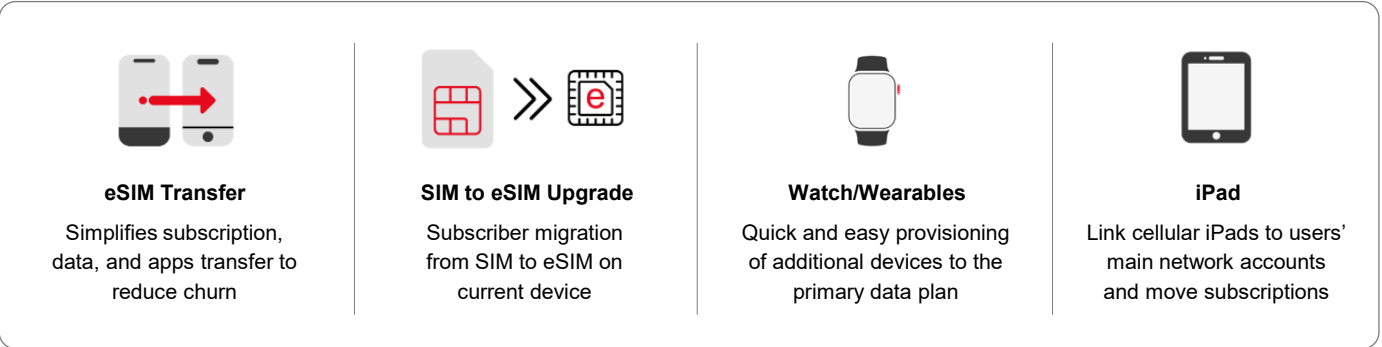
What Does End-to-End Entitlement Server Really Look Like Today?

Definition, Evolution and Benefits

Working of an Entitlement Server



eSIM Entitlements

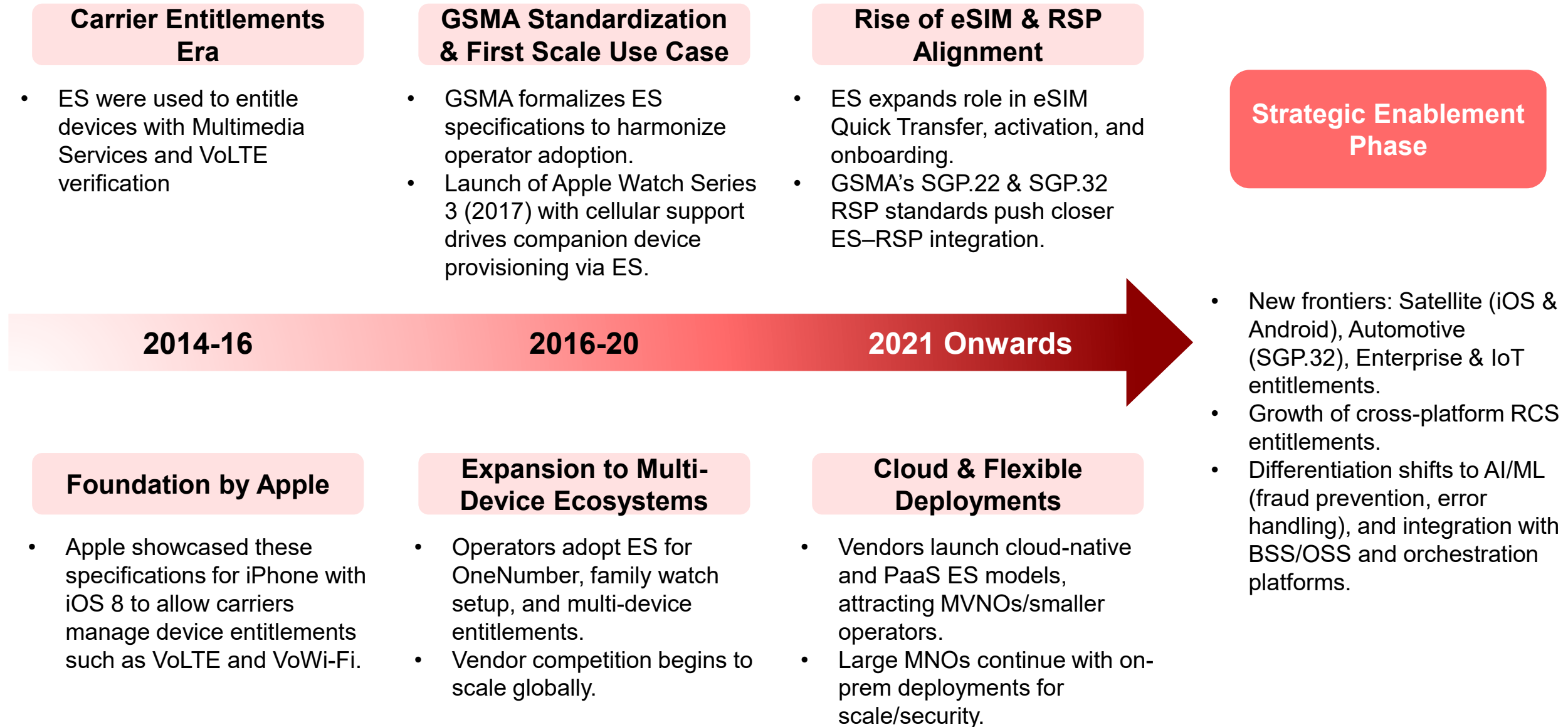


Operator Entitlements

iMessage/FaceTime Auto-provisioned, no SMS authentication required.	VoLTE Auto-provisioned and enabled, no configuration SMS required.
5G Management Efficient data management across 5G data plan.	Advanced Roaming Flexible roaming network selection using enriched information.
Cross-Platform RCS Unified RCS messaging between iOS and Android users.	Wi-Fi Calling An exclusive Entitlement feature, auto-provisioned and enabled.

“Entitlement servers are sophisticated backend systems used by mobile network operators (MNOs) to manage and control access to mobile services. These servers handle the key functions of authentication, authorization, and service provisioning, ensuring that only eligible users and compatible devices can access these features.”

Entitlement Servers: From Legacy Functions to Next-Gen Enablement





How Does the Ecosystem Look Like?

- Platform Vendors
- Key Partnerships
- Value Chain

eSIM Orchestration Platform Vendors: Key Partnerships

	eSIM Software/Server Management	eSIM-capable Hardware	Connectivity Provider
	THALES Kigen	Microsoft SAMSUNG Google	orange vivo
		Lenovo amazon oppo	
		SAMSUNG Google	AT&T Telefonica airtel TELUS
			BT
		SAMSUNG Google	TURKCELL
	Microsoft	ONEPLUS MEIZU Lenovo hmd. NORDIC SEMICONDUCTOR	Amstel T. AIS 中国移动 China Mobile China unicom 中国联通 中国电信 CHINA TELECOM
		Qualcomm SAMSUNG mi oppo	HUTCH
		UNISOC QUECTEL infineon	
	Kigen COMPRION	SEQUANS muRata SEG AUTOMOTIVE	aliv UNITEL etisalat by e2 MÁSMÓVIL
		TELTONIKA	
	Google	SAMSUNG Google	Telia bite Group Sunrise
	CSG	Google	Legos

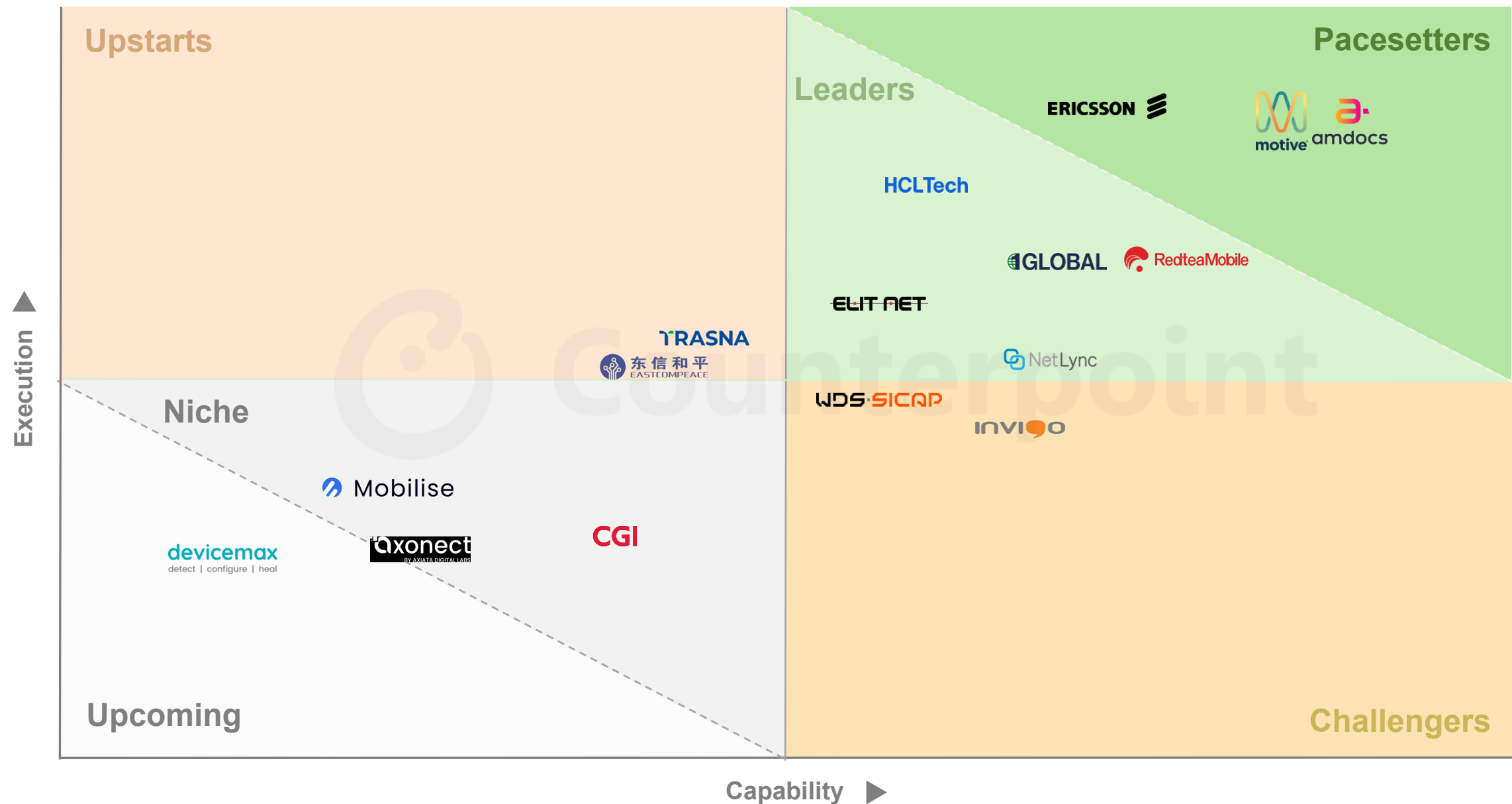
eSIM Orchestration Platform Vendors: Key Partnerships

	eSIM Software/Server Management	eSIM-capable Hardware	Connectivity Provider
东信和平 EASTCOMPEACE	aws HUAWEI CLOUD	国家电网公司 STATE GRID CORPORATION OF CHINA Apple SAMSUNG Google	中国移动 China Mobile 中国电信 CHINA TELECOM China unicom中国联通
	Alibaba Cloud	QUECTEL ASR MICROELECTRONICS	
Mobilise	TATA COMMUNICATIONS		Viasat Dixons Carphone LEBARA One freenet
			degoo m:
TRASNA	Kigen IoT HCLTech	Microsoft SIERRA WIRELESS IS NOW SEMTECH PHILIPS PORSCHE	NTT transatel Telia Virgin Telefonica vodafone
	OXIO		monogoto GIGASKY WORLD MOBILE DATA etisalat by e2 orange ECONET Wireless
WDS-SICAP	TATA COMMUNICATIONS Valid	Apple SAMSUNG Google	
	monty mobile		
inviso	ERICSSON	HUAWEI	dtac mts sodetel connectivity made easy telecel Connecting Energies O ₂ HUTCH
			orange telenor telecomegypt ooredoo JAZZ KOREK TELECOM
			imi mobile MTN moldcell ^{CG} Kcell Freedom mobile
			grameenphone T... vodafone airtel axiata Digicel



eSIM CORE Scorecard, Leaderboard and Capability Analysis

- Scorecard Analysis
- Tech Innovation



Pacesetters have top-of-the-line platforms and excel in market execution.

Amdocs

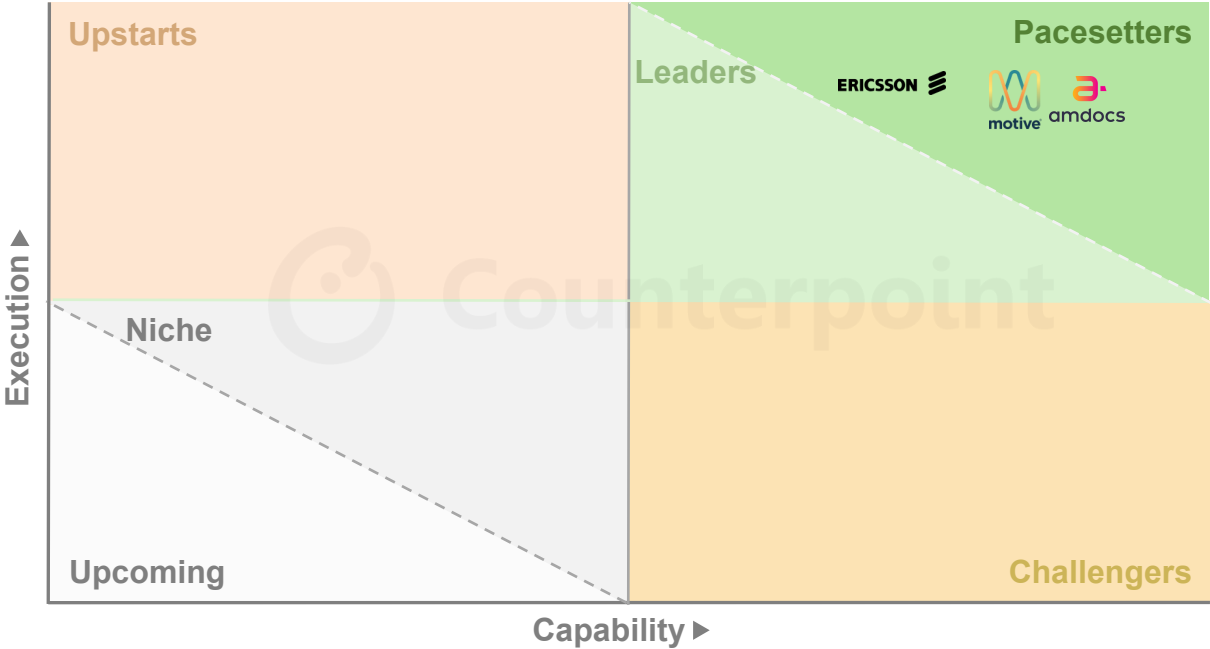
Amdocs emerged as the top player, excelling across most parameters of platform capability. Over the past two years, it has led the market in new platform deployments, reinforcing its strong execution capabilities. Its ability to deliver large-scale deployments positions Amdocs as a benchmark for the industry.

Motive

Motive ranked a close second to Amdocs in platform capabilities. Building on Nokia’s legacy after the 2023 divestiture, it has been agile in adding new features and use cases. Strong Tier-1 MNO partnerships and large-scale deployments place Motive in a favorable position for growth.

Ericsson

Ericsson led the market in execution, with the highest number of platform deployments since being among the first to introduce Entitlement Servers in the mid-2010s. However, to maintain its leadership, Ericsson will need to accelerate the addition of new use cases as operators seek more agile solutions.



“Pacesetters excel across most criteria and have excellent capabilities, but what sets them apart from the rest of the market is their ecosystem success. They lead the way in terms of building and scaling products.”

Leaders have feature-rich platforms with superior execution capabilities.

HCLTech

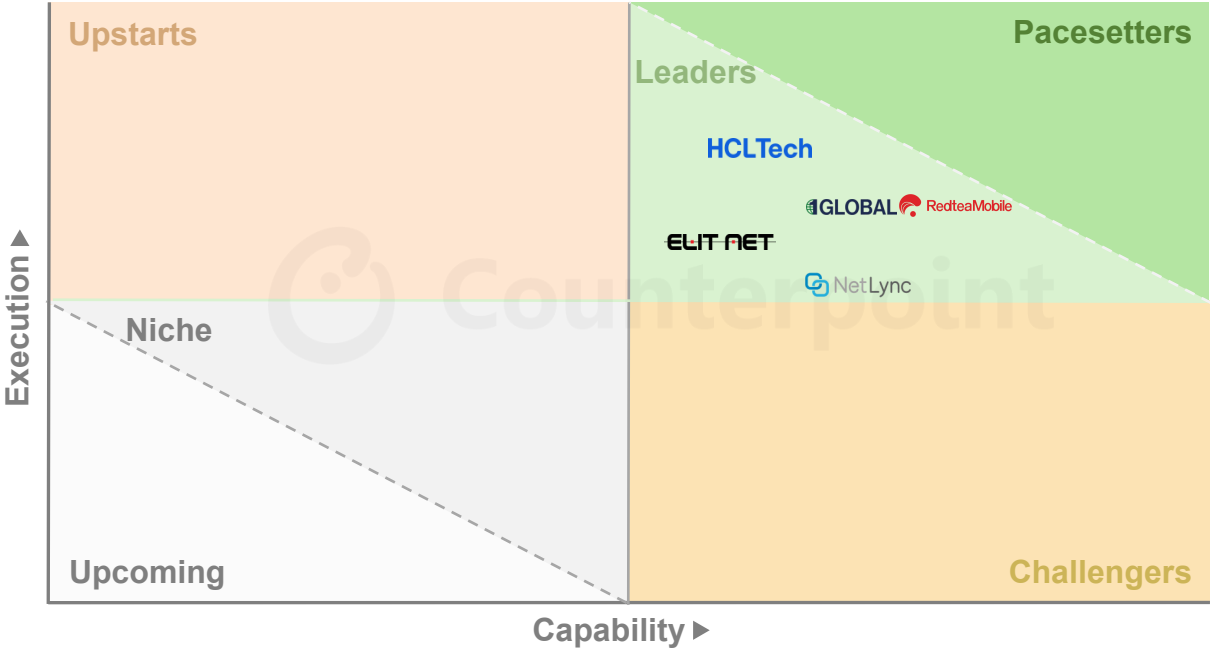
HCLTech emerged as a leader, supported by strong Tier-1 MNO partnerships and proven large-scale deployments. Its execution strength has helped it build credibility, though it will need to expand platform differentiation to stay ahead in a competitive market.

Redtea Mobile

Redtea Mobile offers one of the most widely adopted platforms, particularly in Asia, with large-scale deployments across major operators. Its in-house development and compliance with OEM and GSMA standards give it an edge, and growing international presence is set to strengthen its positioning further.

1Global

1Global has advanced as a leader with a strong European footprint and differentiated offerings combining Entitlement Server, RSP, and travel eSIM. Its partnerships with fintechs, airlines, and Tier-1 operators highlight its ability to bring entitlement services into adjacent industries.



“Leaders in Enablement perform similarly to Pacesetters in categories such as Firmware OS Capabilities and Compliance, and they are gradually honing their capabilities in increasing production and interoperability.”

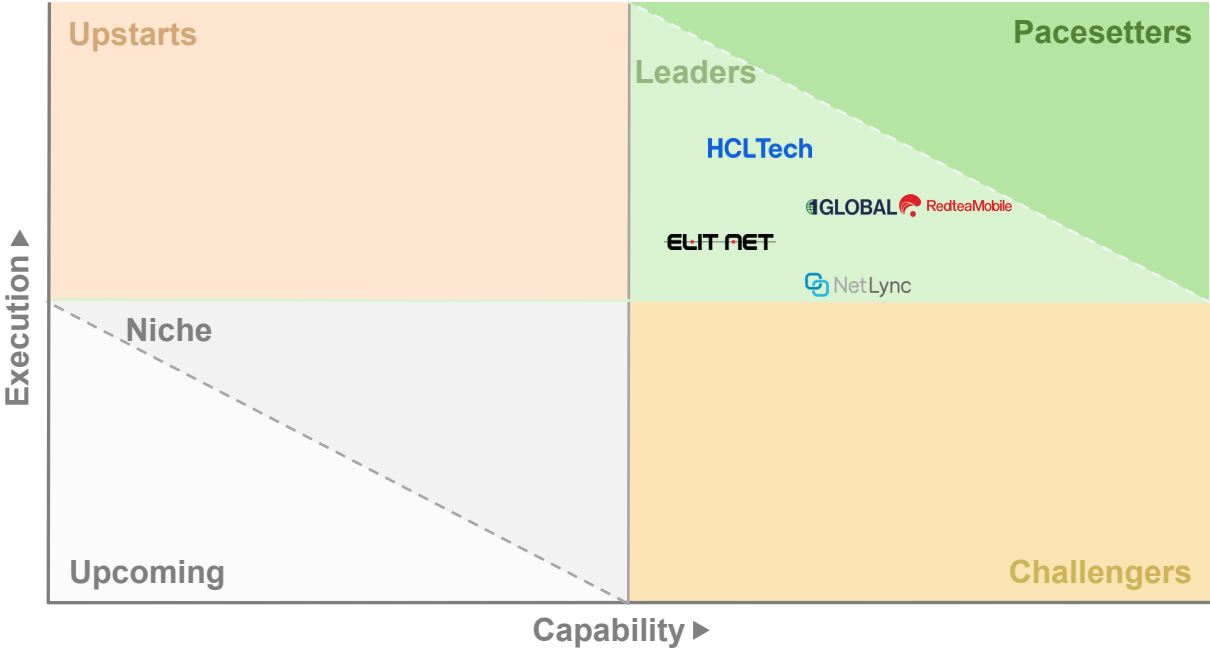
Leaders have feature-rich platforms with superior execution capabilities.

Elitnet

Elitnet remains a reliable player with a feature-rich solution built on long-standing operator relationships. Its strength lies in stability and platform depth, though it has a relatively modest international presence compared to larger peers.

Netlync

NetLync differentiates itself with a modern, cloud-native approach and Entitlements-as-a-Service model. Its self-onboarding capability simplifies integrations, appealing to MNOs and MVNOs looking for faster, lower-cost deployment options.



“Leaders in Enablement perform similarly to Pacesetters in categories such as Firmware OS Capabilities and Compliance, and they are gradually honing their capabilities in increasing production and interoperability.”

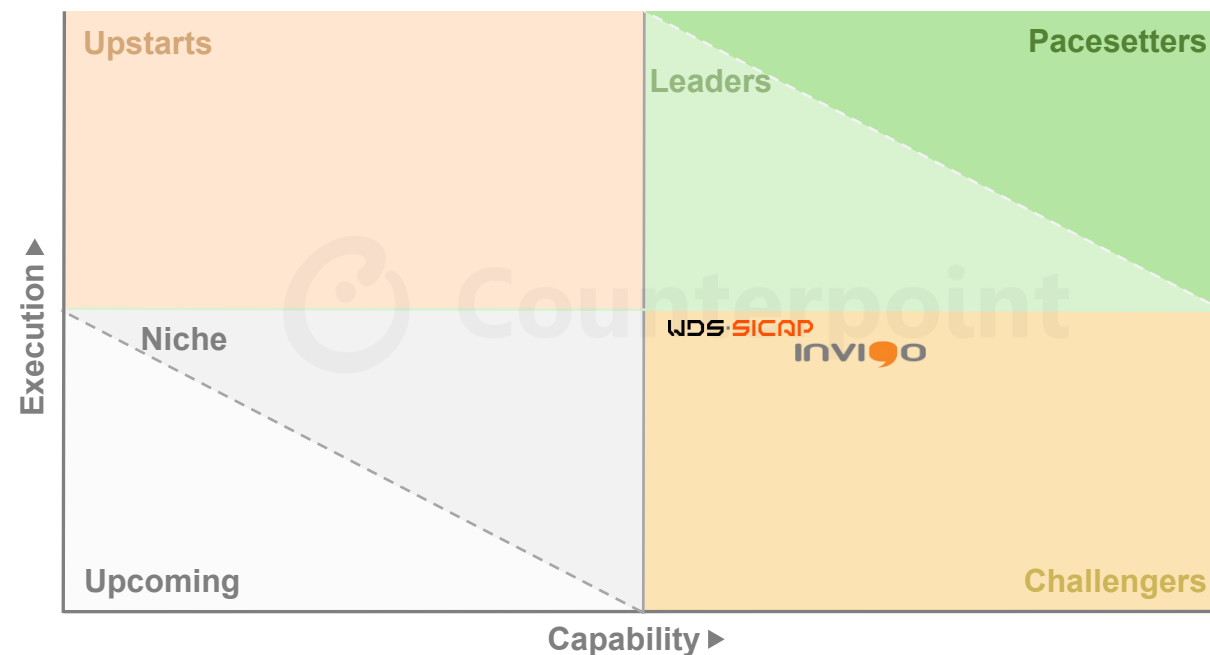
Challengers are players with feature-rich platforms but are still early in their journey. They are well placed to challenge the industry leaders.

WDS-Sicap

WDS-Sicap has developed a capable Entitlement Server solution with a comprehensive set of features that align closely with market leaders. The platform is particularly strong in delivering reliable deployments and supporting operators with differentiated entitlement use cases. However, its global recognition and market penetration remain limited compared to the leaders.

Invigo

Invigo has steadily expanded from its device management heritage into the Entitlement Server domain, supported by its Device Entitlement Server (DES) deployments. The company has proven agility in delivering reliable and quick-to-market solutions, particularly for smaller operators and regional deployments.



“Challengers are players on the verge of transforming into Leaders. They have well-defined platforms for Entitlement Server and are closer to Leaders in terms of capabilities. They are keen on enhancing their partnerships across the ecosystem and platform deployments.”

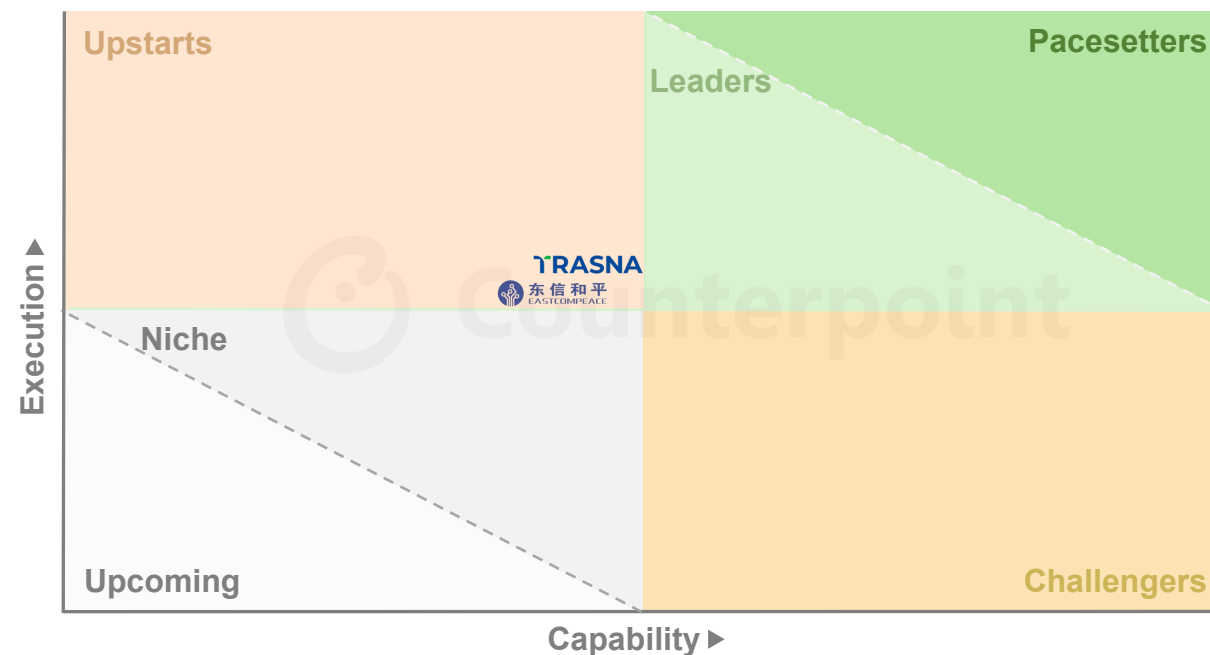
Upstarters are players with early success in the ecosystem. They are well-placed to challenge the industry leaders.

Trasna

Trasna is categorized as an upstart, having gained initial traction in the entitlement server market. While early ecosystem partnerships have enabled Trasna to establish a foothold, further development of platform capabilities, broader integration options, and support for emerging use cases will be critical for scaling and competing against more established vendors.

Eastcompeace

Eastcompeace has emerged as another notable upstart, expanding its reach through selective partnerships and platform deployments in recent years. The company has demonstrated potential in extending entitlement functionality, but it still trails leaders in terms of breadth and depth of platform capabilities.



“Upstarters are on the verge of transforming into Leaders. These players have found early success in the ecosystem with more deployments and are closer to Leaders in terms of ecosystem scores. They will be keen on enhancing their platform capabilities.”

Current Drivers



eSIM Quick Transfer



VoLTE/VoWi-Fi



Companion Device

- Transition from voice entitlements (VoLTE, VoWi-Fi) to eSIM-driven services.
- Strong adoption of Quick Transfer, companion device provisioning, family watch setup.
- Cross-platform RCS now supported by 70%+ of vendors.

Emerging Use-Cases

- Satellite connectivity entitlements for both iOS and Android ecosystems.
- Automotive entitlements aligned with GSMA SGP.32, enabling seamless in-car connectivity.
- Enterprise entitlements to streamline corporate device and service management.
- IoT entitlements supporting scalable activation and lifecycle management.
- ODSA expected to accelerate self-serve onboarding and market access for smaller MNOs/MVNOs.



Satellite Connectivity



IoT Connectivity



Automotive Connectivity



Enterprise Management



On-Device Service Activation (ODSA)

ES platforms are evolving into a foundation for multi-domain connectivity from smartphones to cars, enterprises, and IoT devices.

Key Differentiators

Leaderboard

AI/ML Capabilities

- Enables predictive analytics for churn, fraud, and error handling.
- Enhances operational efficiency through automated decision-making.
- Differentiates vendors by future-readiness and innovation focus.



Integration Strength

- Deep OSS/BSS, CRM, and ecosystem integrations reduce deployment friction.
- In-house integration teams ensure faster time-to-market.
- High integration maturity signals stronger vendor-operator alignment.



Deployment Models

- Flexibility across On-Prem, Cloud, and PaaS caters to all operator sizes.
- On-Prem suits Tier-1 MNOs; Cloud/PaaS fits MVNOs and greenfield players.
- Hybrid options increasingly valued for cost optimization and scalability.



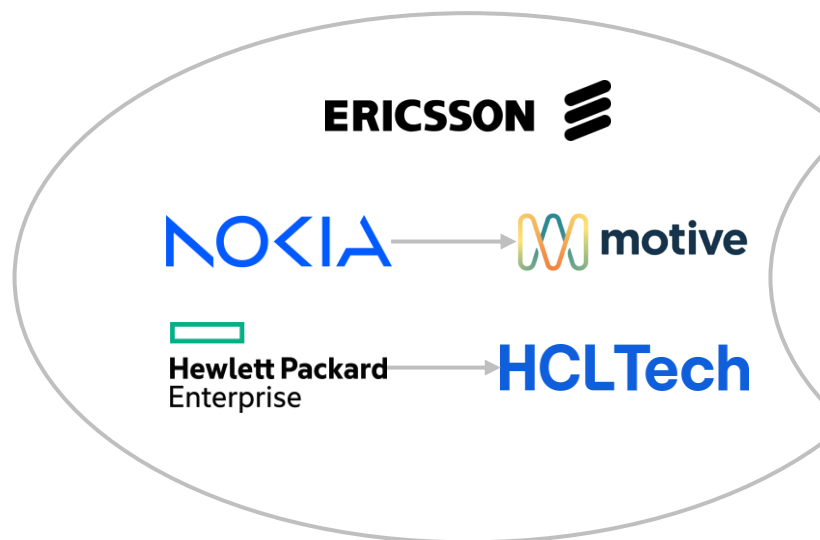
Ecosystem Partnerships

- Ties with OEMs, RSPs, and cloud providers accelerate feature rollouts.
- Partnerships ensure earlier access to Apple/Google updates.
- Broader alliances help vendors expand reach and credibility.



		
AI/ML Adoption		
Integration		
Deployment Models		
Partnerships		
Security		
Transactions		

Early Providers



Growth Accelerators



Emerging Specialists



- Among the first to launch ES platforms, establishing early operator trust.
- Strong presence in legacy carrier entitlements (VoLTE, VoWi-Fi, SMS over IP).
- Benefit from large installed base, but innovation pace is slower vs. newer entrants.

- Capitalizing on eSIM-driven demand: quick transfer, companion devices, family setup.
- Focus on differentiation through AI/ML, seamless BSS/OSS integration, and flexible deployment models (cloud, PaaS).
- Ecosystem partnerships with RSPs, OEMs, clouds for faster rollout.

- Differentiating with unique business models and flexible engagement approaches.
- Agile in customization for MVNOs and smaller/regional MNOs, often with cloud-native platforms.
- Still limited scale, but high potential to disrupt with focused use-case driven offerings.

“Driving customer loyalty, accelerating digital services, and enabling eSIM readiness.”

Seamless Customer Experience

- Instant device onboarding and activation
- Consistent entitlements across devices (phone, watch, tablet)
- Reduced friction → stronger customer loyalty

Scalable eSIM Adoption

- Supports quick transfer, companion provisioning, family setup
- Extends to IoT, automotive, enterprise (SGP.32 readiness)
- Accelerates operator participation in Apple/Android programs

Operational Efficiency

- Automates entitlement processes and error handling
- Reduces customer support overhead and churn risk
- Lowers time-to-market for new services

Service Agility & Innovation

- Enables faster rollout of new entitlements, services, and features.
- Provides flexibility to adapt to evolving OEM and standards
- Strengthens operator positioning in digital-first services.

New Revenue Opportunities

- Monetization of companion devices and family plans
- Enablement of enterprise and IoT-specific entitlements
- Cross-platform RCS and value-added digital services

Entitlement Servers

“Entitlement Servers are no longer tactical tools; they have become a core enabler of operators’ digital transformation, supporting both immediate efficiency and long-term eSIM strategy.”



Entitlement Server Vendor Profiles

- Amdocs



Pacesetter



AT A GLANCE

50+

Customers across
the globe

Pacesetter

Entitlement Server Rankings,
2025

\$5 billion+

Revenue in 2024

OFFERINGS AND SOLUTIONS



eSIM Orchestration



Authentication



Entitlement Server

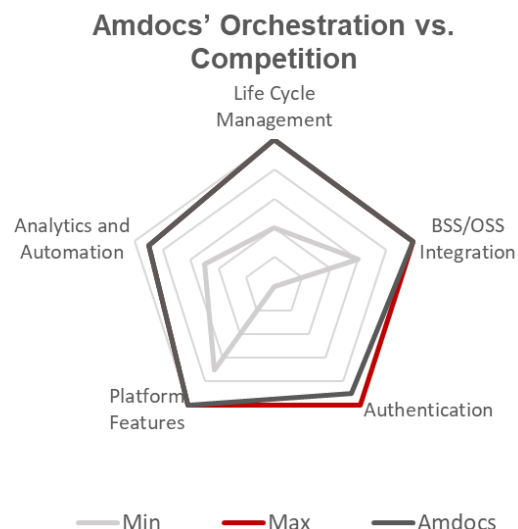


BSS/OSS

Entitlement Server Capability Ranking

Offering	Compliance	API Calls	Integration
1	1	1	1
Security	Platform Reliability	Platform Features	Multi-Tenancy
1	1	1	1
Analytics	Automation	Time to Market	
1	1	6	

- Amdocs’ Entitlement Server is a core part of its digital connectivity portfolio, supporting VoLTE, VoWi-Fi, RCS, device onboarding, and companion provisioning. Built on a cloud-native architecture, it serves both large MNOs and agile MVNOs with flexible deployment options, including on-premises, private cloud, and SaaS.
- Amdocs integrated its Entitlement Server with Google’s Configuration Server (ACS), enabling advanced Android experiences such as RCS, VoIP, VoWi-Fi, and Firebase Cloud Messaging. The solution also works with Google Cloud’s Telecom Subscriber Insights (TSI) for eSIM activation and subscription management.
- In June 2025, Amdocs launched *MVNO&GO*, a cloud-native SaaS platform designed to accelerate MVNO launches with streamlined onboarding and advanced digital connectivity. The platform integrates Amdocs’ Entitlement Server via its eSIM Cloud, enabling seamless device entitlement and activation. Deployments are already live with AT&T and Consumer Cellular in the U.S. and MVNE.pl in Poland, leveraging the connectX platform for customer management and eSIM enablement.
- In August 2025, Amdocs expanded its multi-year agreement with Consumer Cellular, enhancing its MVNE platform through connectX, the AI & Data Platform, and Customer Experience Insights to support faster onboarding, automation, and improved customer personalization. Earlier in March 2025, MVNE.pl selected Amdocs connectX, together with the Entitlement Server and eSIM Cloud, to strengthen digital onboarding and eSIM-driven services.
- Amdocs partnered with Drei Austria to launch a fully digital eSIM experience using its SaaS-based eSIM platform and Entitlement Server. Integrated into Drei’s up app, the solution eliminates QR codes and supports eSIM activation for major device brands like Apple, Google, and Samsung.



Strengths

- Deep integration with eSIM solutions through strong partnerships with Tier-1 RSP providers.
- Robust and comprehensive ES portfolio being one of the most complete in the market, with faster rollout of new features and updates.
- Global presence and strong brand trust with Tier-1 MNOs worldwide

Challenges

- Intensifying competition from legacy players modernizing their ES portfolios and expanding functionality to retain operator share.
- Rising threat from agile new entrants targeting smaller MNOs and MVNOs with flexible, lower-cost ES solutions.

Opportunities

- Positioned within a niche set of vendors offering tightly integrated ES with eSIM orchestration, a capability expected to gain strategic importance.
- Rising adoption of eSIM and entitlement servers by mid-tier operators, MVNOs, and sub-brands opens new growth segments.

Analyst Take

Amdocs is strategically positioned as a leading provider of entitlement server solutions, backed by strong global Tier-1 operator relationships and a track record of successful large-scale deployments. Its cloud-native architecture, combined with deep integration across eSIM orchestration and customer management platforms, makes it one of the most complete offerings in the market. Amdocs is well-placed to capture future growth opportunities and strengthen its role as a trusted partner for operators worldwide.



Appendix

Methodology and Key Definitions

Primary Research

- Briefing Calls and Interviews, Including:
- Entitlement Server Companies
- B2B Partners
- Platform Capabilities Demos

Secondary Research

- Service Documentation and Tutorials
- Whitepapers, Solution Briefs and Reports
- Customer Case Studies
- Partner Network Reach

Expert Analysis

- Trends Observations and Platform Fit Analysis
- Comparative Analysis on Capabilities
- GAP Analysis - Feature, Partner, Application, Geo, and More.
- Corporate and Product Strategy Analysis
- Platform SWOT and Outlook Analysis

Companies Profiled in the Rankings



Authors



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Senior Research Analyst



Varun specializes in eSIM, FWA, Broadband, IoT, emerging devices, and IP licensing. His role focuses on uncovering trends and opportunities within these dynamic sectors, leveraging his keen insights and industry experience to support the evolving needs of our clients. Prior to joining Counterpoint, Varun contributed to the consumer electronics field with Dyson, where he gained hands-on experience in market dynamics and product innovation. Based in Bangalore, he holds a Bachelor of Technology in Mechanical Engineering from Delhi College of Engineering.



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Siddhant has over 8 years of experience in the telecommunications industry. Currently serving as a Research Analyst at Counterpoint Research, he focuses on wireless technologies and their business implications. Siddhant has previously worked with global leaders such as Bosch and Ericsson, managing networks for prominent operators including Claro, Sprint, and RCOM. He holds an engineering degree in Electronics and Communication and an MBA from IIT-Delhi. He is based in Delhi, India.

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