Industry Playbook

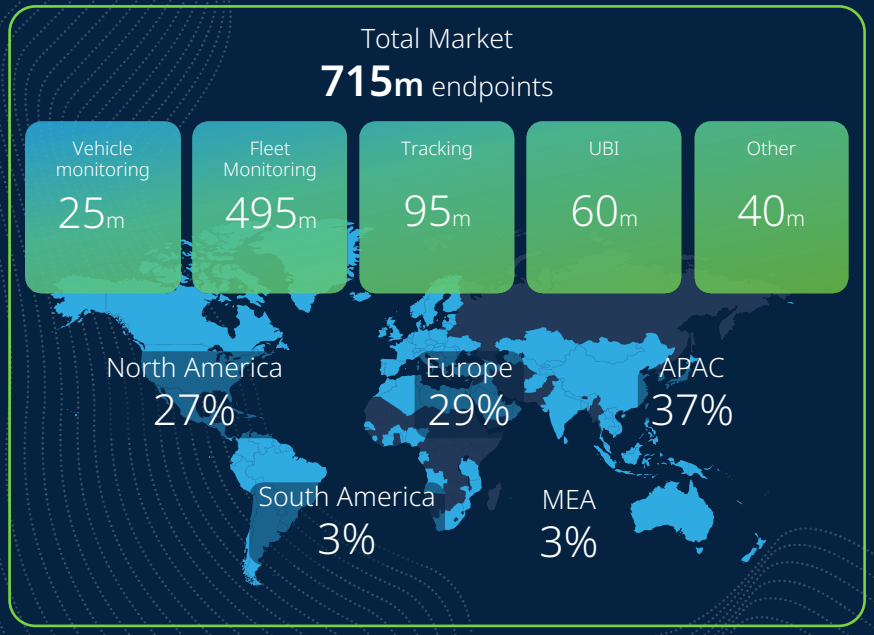
Automotive Edition

Market Insights, Best Practices, Player Overview along the Value Chain

March 2025

Automotive is a massive IoT industry requiring global coverage

Relevance of Automotive use cases for the IoT market:



1NCE's footprint in the Automotive sector:

Automotive customers represent:
17%
of 1NCE customers

Automotive customers located in
41
countries worldwide

Top 10 countries for 1NCE

1) USA
2) Italy
3) Germany
4) France
5) China
6) Canada
7) Netherlands
8) Great Britain
9) Serbia
10) Greece

Automotive use cases represent:
39%
of managed endpoints

Automotive customers use 1NCE in
137
countries worldwide

Number of large deployments
388

Typical deployment size
10-50k
endpoints

Sources: Market data courtesy of Transforma Insights, 1NCE Customer Insights
As of Jan 2025, 1NCE served 23,000 customers of which 17% are active in the Automotive sector.
Common use cases supported are tracking, User-Based insurance, vehicle diagnostics, EV charging, and more.

The automotive industry is a heavy weight in IoT
17% of our customers are building Automotive solutions

	Customers %	Typical applications			Selected customers
Utilities	20%	• Electricity meters • Gas meters	• Water meters • Leak prevention	• Network monitoring • Smart grid	asl always connected, cast4all technologies
Infrastructure	8%	• Remote Maintenance for elevators	• Solar Energy Monitoring • Charging stations	• Water and heating metering	OTIS, OCEA Smart Building, zonneplan, LOXAM
Logistics	7%	• Asset tracking • Temperature monitoring	• Telemetry for vehicles • Geo-fencing	• Cold-chain monitoring	blulog, Trackting, Spireon
Automotive	17%	• Usage based insurance • Road-charging	• Fleet management • Car sharing	• Stolen vehicle recovery • Fuel level monitoring	VIMCAR, TARGA Telematics, PROCON
Industry	9%	• Oil monitoring • Industrial automation	• Tank monitoring • Equipment monitoring	• Industrial sensors	metasphere, autosen automation & sensors
Agriculture	7%	• Remote analysis of bee colonies	• Pest control • Yield monitoring	• Geofencing and alerting	BAYER, XFARM, eMitter
Smart Cities	6%	• Cost and energy reduction	• Water leakage monitoring	• Elevator management solutions	FLASHNET An ENGIE company, convadis
Healthcare	2%	• Health monitoring • Refrigeration monitoring	• Cleaning monitoring (hotels)	• Digital signage	Zenicor, MICRODEFENDER
Consumer	7%	• Indoor Wellbeing Monitoring	• Professional Coffee Machines' Monitoring	• Energy consumption monitoring	Sentinum FORGING FUTURE, switchee
Retail	1%	• Vending Machines Monitoring	• Payment Processing		Danfoss, CASYOPE services

% of Customers in the other verticals – 16%

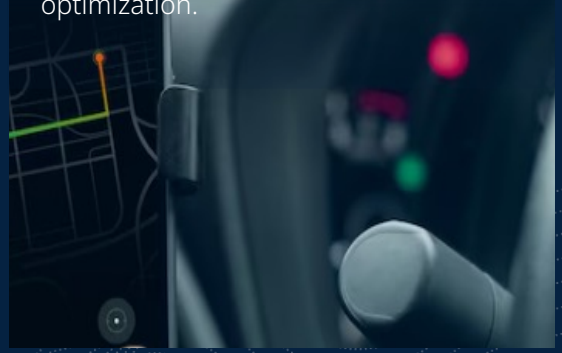
Key IoT use cases in Automotive

Fleet Management

IoT devices, software, and connectivity support fleet management in tracking and managing vehicle fleets for logistics, insurance, entertainment services, and navigation. It provides real-time data on vehicle performance, location, and driver behavior, optimizing routes and improving safety.

In-Vehicle Navigation

With IoT, in-vehicle navigation systems offer real-time, turn-by-turn guidance, helping drivers reach their destinations efficiently. These systems integrate traffic updates, live route adjustments, hazard warnings, and weather conditions, allowing for dynamic route planning and continuous optimization.



EV charging

IoT-powered EV charging integrates connected devices for real-time monitoring, predictive maintenance, and dynamic load management. IoT systems optimize energy use, adjust pricing based on demand, and provide real-time updates to users.

Key IoT use cases in Automotive

Usage-Based Insurance

Usage-based Insurance (UBI) demonstrates the benefits of IoT in automotive industry, specifically in insurance. Through telematics devices, insurers collect data on vehicle usage and driving behavior, such as speed, braking, and time of day. This data allows insurers to calculate premiums based on actual driving patterns rather than traditional risk factors.

Vehicle Diagnostics

IoT-enabled vehicles help to monitor specific operations and overall vehicle health via analyzing data like engine efficiency, fuel consumption, braking system functionality, and battery status. With sensors, onboard diagnostics (OBD), and IoT connectivity this data is delivered real-time to centralized systems or cloud platforms.

Overview of players with traction in the market

Key layers in **Automotive OEMs**

Player	Logo	Location	Description	Website
Actia	ACTIA ELECTRONICS	France	Telematics Control Units (TCUs) provider	Link
Aptiv	APTIV	Ireland	V2X (Vehicle-to-Everything) systems provider	Link
Continental	Continental	Germany	TCU, V2X Communication, and OTA Update provider	Link
Harman	HARMAN	USA	Telematics Platforms and V2X Communication Systems	Link
Denso	DENSO	Japan	TCU, In-Vehicle Infotainment, and Cloud Services	Link
Hyundai Mobis	HYUNDAI MOBIS	South Korea	Telematics Units and IVI Systems (navigation, integration)	Link
Magneti Marelli	MAGNETI MARELLI	Italy	Connected Car Platforms, incl. telematics & diagnostics	Link
Valeo	Valeo	France	Specializes in ADAS (Advanced Driver Assistance Systems)	Link

Find more at the **1NCE Knowledge Base**

Overview of players with traction in the market

Specialized players in **Telematics Service**

Player	Logo	Location	Description	Website
Beijing Yesway		China	Connected car services like diagnostics & remote control	Link
Bosch	BOSCH	Germany	Telematics systems & OEMs diagnostics provider	Link
Cerence	cerence	USA	Voice recognition & connected services (in-car assistants)	Link
Octo Telematics	OCTO	Italy	Vehicle monitoring & insurance telematics	Link
PATEO	PATEO	China	AI-powered in-vehicle solutions and connected platforms	Link
Sibros	SIBROS	USA	OTA updates, data collection, and diagnostics for OEM	Link
SiriusXM	SiriusXM	USA	Emergency assistance, diagnostics, and infotainment	Link
Targa Telematics	TARGA TELEMATICS	Italy	Fleet management, tracking, and telematics	Link

Find more at the **1NCE Knowledge Base**

Overview of players with traction in the market

Specialized players in **Car Manufacturing**

Player	Logo	Location	Description	Website
Hyundai		South Korea	Offers telematics, UBI programs & in-vehicle platforms	Link
Genesis		South Korea	Provides all connected services	Link
Volkswagen		Germany	Remote access and safety features; own app store	Link
Mercedes-Benz		Germany	Develops proprietary MB.OS operating system	Link
Toyota		Japan	OTA updates and telematics subscription models	Link
General Motors (GM)		USA	Provides OnStar as a security service	Link
Ford		USA	FordPass offers complimentary remote services	Link
BMW		Germany	ConnectedDrive services; modular service options (OTA)	Link

Find more at the **1NCE Knowledge Base**

Players 1NCE is supporting in the field

Player		Use Case	More info
Ikon	ikon technologies	Automotive dealership solutions: lot management, vehicle tracking, customer retention tools	Link
Autogear	AUTOGEAR®	Automated mileage tracking solution; records all driving activities, calculates distances, and generates reports	Link
Mictrack	mictrack	Asset management and car tracking solution	Link
MOTO.BOX	MOTO.BOX	Real-time monitoring of driving data; route tracking and alerts; UBI adjustments	Link
Schaeffler	SCHAEFFLER	Real-time vehicle diagnostics; predictive maintenance	Link
Targa Telematics	TARGA TELEMATICS	Fleet management, car sharing, insurance telematics, and remote diagnostics across over 500,000 connected assets.	Link
ThinxNet	ThinxNet we connect things	Real-time vehicle diagnostics, trip tracking, and location sharing without relying on external power	Link
TOPFLYtech	TOPFLY tech	Large-scale transportation management with real-time data collection	Link
Vimcar	VIMCAR	Fleet management, drivers' license checks, vehicle booking, cost reporting	Link

Find more at the **1NCE Knowledge Base**

Understanding the roles of players along the value chain

Creating connected products in the Automotive industry means to maneuver through the IoT ecosystem

Sensor Manufacturer	IoT Device Manufacturer	OEM manufacturer	System Integrator	Solution Provider
Building components measuring environ-mental data such as • Speed/acceleration • Tire pressure • Engine performance • Humidity • Temperature • Etc.	Putting together required technical components such as • Chipset • Modem • Sensors • Battery / Power • Etc.	Line production and integration of IoT devices into assets: • Smart infotainment systems • ADAS • Trackers • Telematics units • Smart dashboards & digital clusters • Etc.	Specialized in bringing software and hardware components together • Hardware design • Connectivity design • Cloud integration • Software enablement	End-to-end owner of the solution, focus on selling and servicing • Automotive manufacturers • Fleet management companies • Mobility service providers • Insurance organizat ions • Etc.

1NCE has a dedicated offering for Automotive

	Typical customer requirements	Standard offerings	1NCE Offering
Pricing	• Single SKU • Cost transparency • Often only low data use cases	• Multiple suppliers for each region • Monthly fees, overage charges • Data selling focus, high data preferred	✓ All-in-1: $10/10 years of service ✓ Transparent: no monthly fees ✓ Lifetime Flat: 500 MB, 250 SMS
Coverage	• Global coverage • Support of LPWA technology • Multiple network and operator switch	• Country group pricing, zoning • No or limited NB-IoT and LTE-M support • Different SIMs for different regions	✓ 173 countries coverage; no zoning ✓ +50 LPWA networks supported ✓ Global SIM with eUICC support
Service	• Device Management • API support • Interoperability	• Device Mgmt not included • API use not available or at high cots • No compatibility with 3rd party software	✓ Included in 1NCE OS ✓ All functions exposable through API ✓ Can be natively used with 1NCE Plugins

We bring your data from the sensor to the cloud

1NCE Platform

Connect

- 500 MB
- 250 SMS
- 173 countries
- VPN / APN
- Data Streamer

OS

- Cloud Integration
- Location Services
- Energy Saver
- APIs
- Device SDKs

$10 for 10 years

Business	Industrial	Chip
$1.00	$2.00	$2.50

Sensor Data

Our 1NCE Lifetime Flat is the new standard in IoT

1NCE IoT Lifetime Flat

10 years of service including:

1NCE Connect

- 500 MB
- 250 SMS
- 173 countries coverage
- Open VPN
- API Usage & APN
- Data Streamer
- Monthly data limits
- IMEI Lock
- Freedom to Switch
- 3 months grace period

1NCE OS

- Cloud Integrator
- Device Locator
- Energy Saver
- Device Authenticator
- Device Inspector
- Device SDKs and Blueprints
- LwM2M Service
- Device Controller
- Admin Logs
- Access to Developer Hub (Documentation)

One time fee: **$10.00**

SIM Options

Business

$1.00

Industrial

$2.00

Chip

$2.50

- ✓ Already covers all requirements for most IoT uses cases
- ✓ Already sold to 23,000+ customers in 100 countries
- ✓ Widely used across all industries and verticals
- ✓ No minimum order quantities*

Optional Add-Ons and Extensions

Data Top-Up Additional 500 MB and 250 SMS	+$10.00	**Advanced Device Locator** High-res network location service	
Lifetime Extension Additional 10 years, 500 MB and 250 SMS	+$10.00	**Plugins** Integrated 3rd Party Software	Free Trial
High Data Option High throughput 25Mbit/s	$5.00 / GB	**High Security Data Routing** IPSec / VPC Peering services	$1,800+ / yr

- ✓ Add-Ons trusted by 4,000+ advanced users
- ✓ Co-developed with and for customers

All prices and information as of February 2025

* For IoT SIM Card Business only. Industrial-grade SIMs are MOQ 100.

About 1NCE

Fast

23,000+ customers won in 7 years

400+ team across Europe, Asia and US

30 million managed endpoints

+100% year on year average growth

*"1NCE launched its flat rate life-time connectivity offering for connected devices in 2018 and **has achieved unparalleled growth in the past two years."***

Johan Fagerberg, CEO, Berg Insight

Strong

- Global access under a strong a family of local network operators
  - EU — Deutsche Telekom AG
  - USA — T-Mobile US
  - Asia — SoftBank
  - China — China Telecom
  - Claro — Claro
  - Bell — Bell

Everywhere

Can be used for multiple IoT applications

1NCE is a company offering a software platform for connected products that delivers future-proof, hassle-free IoT in 173 countries and regions. The software platform enables customers to easily, securely and reliably collect device data and turn it into actionable intelligence. This accelerates time-to-market for data collection projects by months, increases device lifetime by years, and allows efficient management of sensors from initial deployment to the end of the product lifecycle. More than 23,000 users and 60 Fortune 500 companies trust 1NCE with 30 million connected products worldwide.

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