



Industry Playbook

Utilities Edition

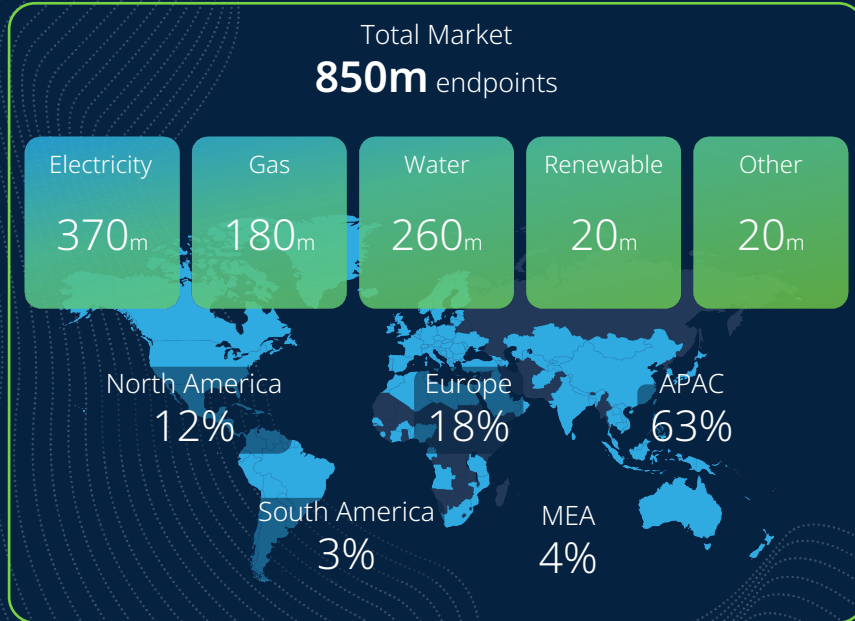
Market Insights, Best Practices, Player Overview along the Value Chain

March 2025

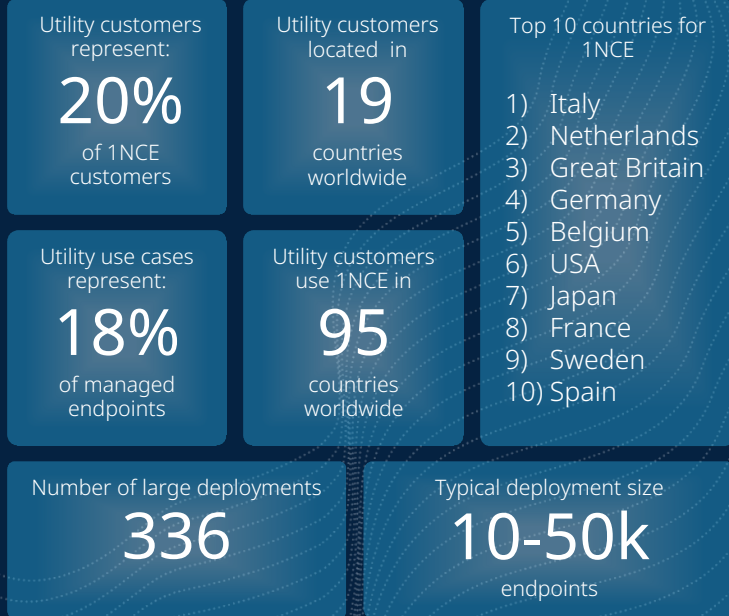


Utilities is a massive IoT industry requiring global coverage

Relevance of Utilities use cases for the IoT market:



1NCE's footprint in the Utilities sector:



Sources: Market data courtesy of Transforma Insights, 1NCE Customer Insights
As of Jan 2025, 1NCE served 23,000 customers of which 20% are active in the Utilities sector.
Common use cases supported are gas, water, and electricity metering.

The Utilities industry is a heavy weight in IoT

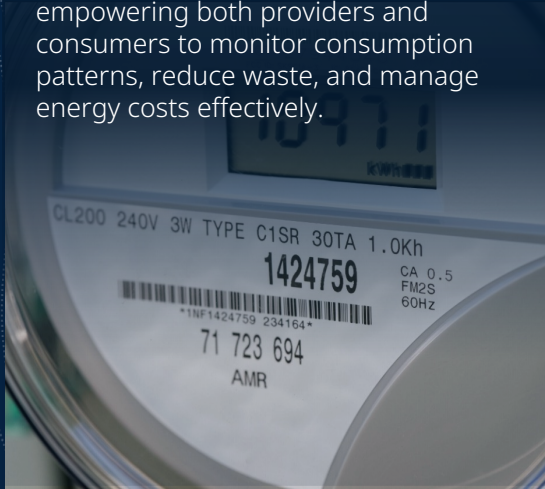
20% of our customers are building smart metering solutions

Customers %		Typical applications		Selected customers	
Utilities		<ul style="list-style-type: none">Electricity metersGas meters	<ul style="list-style-type: none">Water metersLeak prevention	<ul style="list-style-type: none">Network monitoringSmart grid	
Infrastructure		<ul style="list-style-type: none">Remote Maintenance for elevators	<ul style="list-style-type: none">Solar Energy MonitoringCharging stations	<ul style="list-style-type: none">Water and heating metering	
Logistics		<ul style="list-style-type: none">Asset trackingTemperature monitoring	<ul style="list-style-type: none">Telemetry for vehiclesGeo-fencing	<ul style="list-style-type: none">Cold-chain monitoring	
Automotive		<ul style="list-style-type: none">Usage based insuranceRoad-charging	<ul style="list-style-type: none">Fleet managementCar sharing	<ul style="list-style-type: none">Stolen vehicle recoveryFuel level monitoring	
Industry		<ul style="list-style-type: none">Oil monitoringIndustrial automation	<ul style="list-style-type: none">Tank monitoringEquipment monitoring	<ul style="list-style-type: none">Industrial sensors	
Agriculture		<ul style="list-style-type: none">Remote analysis of bee colonies	<ul style="list-style-type: none">Pest controlYield monitoring	<ul style="list-style-type: none">Geofencing and alerting	
Smart Cities		<ul style="list-style-type: none">Cost and energy reduction	<ul style="list-style-type: none">Water leakage monitoring	<ul style="list-style-type: none">Elevator management solutions	
Healthcare		<ul style="list-style-type: none">Health monitoringRefrigeration monitoring	<ul style="list-style-type: none">Cleaning monitoring (hotels)	<ul style="list-style-type: none">Digital signage	
Consumer		<ul style="list-style-type: none">Indoor Wellbeing Monitoring	<ul style="list-style-type: none">Professional Coffee Machines' Monitoring	<ul style="list-style-type: none">Energy consumption monitoring	
Retail		<ul style="list-style-type: none">Vending Machines Monitoring	<ul style="list-style-type: none">Payment Processing		

Key IoT use cases in Utilities

Electricity Metering

Tracking electricity usage to ensure accurate billing and promote energy conservation. IoT-enabled electricity meters provide real-time data, empowering both providers and consumers to monitor consumption patterns, reduce waste, and manage energy costs effectively.



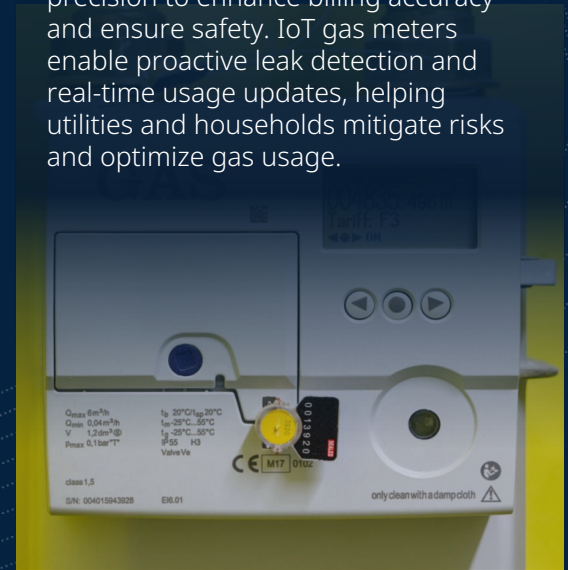
Water Metering

Delivering real-time insights into water usage to support conservation efforts and prevent wastage. IoT water meters detect leaks early and provide actionable data, ensuring sustainable water management for households and businesses alike.









Gas Metering


Monitor gas consumption with precision to enhance billing accuracy and ensure safety. IoT gas meters enable proactive leak detection and real-time usage updates, helping utilities and households mitigate risks and optimize gas usage.



Overview of players with traction in the market







Key players in **Smart Meters**


Player	Logo	Location	Description	Website
Itron		USA	Smart metering solutions for electricity, gas, and water	Link
Landis+Gyr		Switzerland	Metering and grid solutions for electricity, gas, water	Link
Aclara (Hubbell)		USA	Infrastructure and data solutions for water, gas, electro	Link
Gridspertise		Italy	Edge tech and digital solutions, incl. smart metering	Link
Honeywell		USA	Smart energy solutions, including smart metering	Link
Nansen		China	Metering and energy management for electricity utilities	Link

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

Overview of players with traction in the market






Specialized players in **Communication Solutions**

Player	Logo	Location	Description	Website
Itron		USA	Cellular, RF mesh, and power line communication (PLC)	Link
Landis+Gyr		Switzerland	Cellular, RF mesh, and PLC-based comm. for AMI	Link
Sensus (Xylem)		USA	Cellular, RF mesh, and wide-area network provider	Link
Aclara (Hubbell)		USA	Cellular, RF mesh, and hybrid systems provider	Link
Honeywell		USA	Energy solutions with communication smart metering	Link
Nighthawk (Tesco)		USA	Cellular connectivity solutions, including modules	Link








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

Overview of players with traction in the market

Specialized players **System Integration & Service Providing**

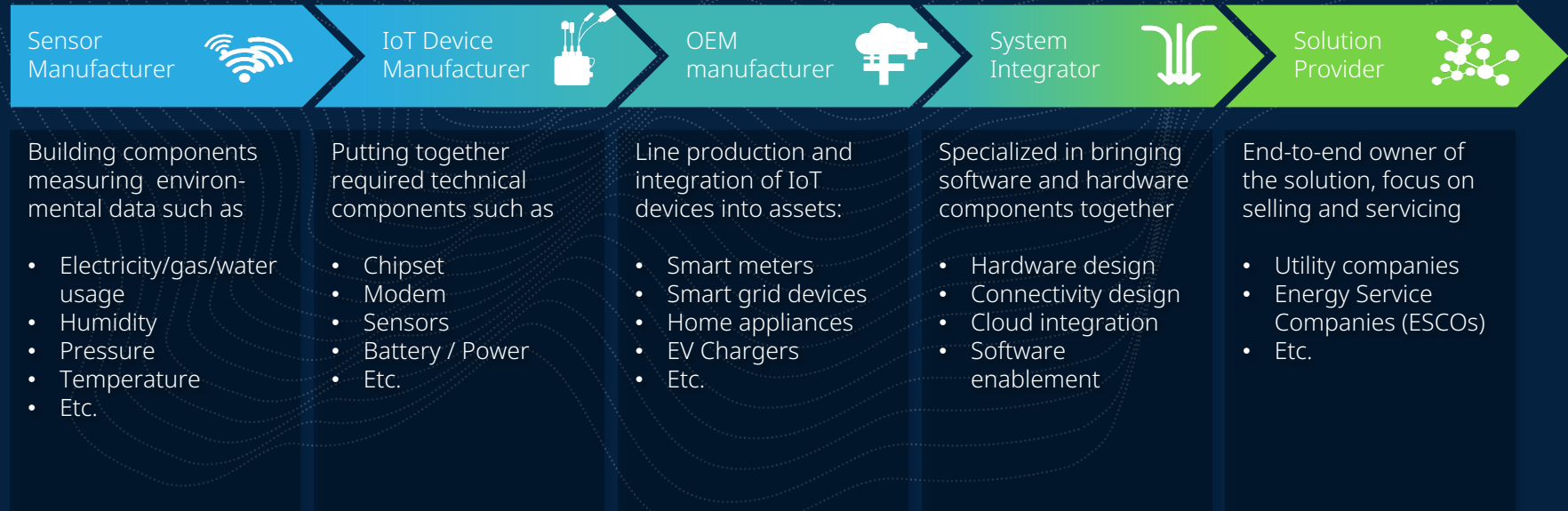
Player	Logo	Location	Description	Website
Accenture		Ireland	AI-driven grid optimization, meter analytics, and cloud-based energy management provider	Link
Capgemini		France	End-to-end smart metering solutions, data acquisition, integration, predictive maintenance	Link
Cisco		USA	IoT networking for AMI, edge computing for real-time grid monitoring, and SD-WAN solutions	Link
GE Vernova		Norway	Data integration for utilities with cloud-native Meter Data Management (MDM) solutions	Link
IBM		USA	AI-powered predictive analytics provider	Link

Players 1NCE is supporting in the field

Player		Use Case	More info
Società Impianti Metano		Gas metering across over 40 gas plants	Link
Cast4All		Smart metering with Cast4All's management platform together with Gateways from Xemex	Link
Hildebrand		Energy metering; together with Transport for London (TfL) implemented a smart metering network across a diverse range of locations	Link
Lobaro		Full-service IoT provider; sensor platform for Industrial IoT, Smart City and Smart Metering	Link
PLUM		Detecting anomalies in the water distribution system like unusual increments or drops of pressure and therefore possible leaks	Link
Solutions 30		Smart metering and electric vehicle charging optimization	Link
Xemex		Monitoring both small and large volumes of residential PV and Home Energy Monitoring systems	Link

Understanding the roles of players along the value chain

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



1NCE has a dedicated offering for Smart Agriculture

	Typical customer requirements	Standard offerings	1NCE Offering
Pricing	<ul style="list-style-type: none">• Single SKU• Cost transparency• Often only low data use cases	<ul style="list-style-type: none">• Multiple suppliers for each region• Monthly fees, overage charges• Data selling focus, high data preferred	<ul style="list-style-type: none">✓ All-in-1: 10 €/10 years of service✓ Transparent: no monthly fees✓ Lifetime Flat: 500 MB, 250 SMS
Coverage	<ul style="list-style-type: none">• Global coverage• Support of LPWA technology• Multiple network and operator switch	<ul style="list-style-type: none">• Country group pricing, zoning• No or limited NB-IoT and LTE-M support• Different SIMs for different regions	<ul style="list-style-type: none">✓ 173 countries coverage; no zoning✓ +50 LPWA networks supported✓ Global SIM with eUICC support
Service	<ul style="list-style-type: none">• Device Management• API support• Interoperability	<ul style="list-style-type: none">• Device Mgmt not included• API use not available or at high costs• No compatibility with 3rd party software	<ul style="list-style-type: none">✓ 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

Your Devices



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

Your Data



Business



1.00 €

Industrial



2.00 €

Chip



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



- ✓ Already covers all requirements for most IoT use 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 €

Lifetime Extension

Additional 10 years, 500 MB and 250 SMS

+ 10.00 €

High Data Option

High throughput 25Mbit/s

5.00€ / GB

Advanced Device Locator

High-res network location service

Plugins

Integrated 3rd Party Software

Free Trial

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

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  中国电信
- Claro  Claro
- Bell  Bell

Everywhere

Can be used for multiple
IoT applications



Smart
Agriculture



Waste
Management



Industrial
Automation



Fleet
Telematics



Smart City



Tracking



AR / VR



Smart
Buildings



Infrastructure
monitoring



Smart
Metering



Remote
Monitoring



Tracking
Devices

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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