



Industry Playbook

Automotive Edition

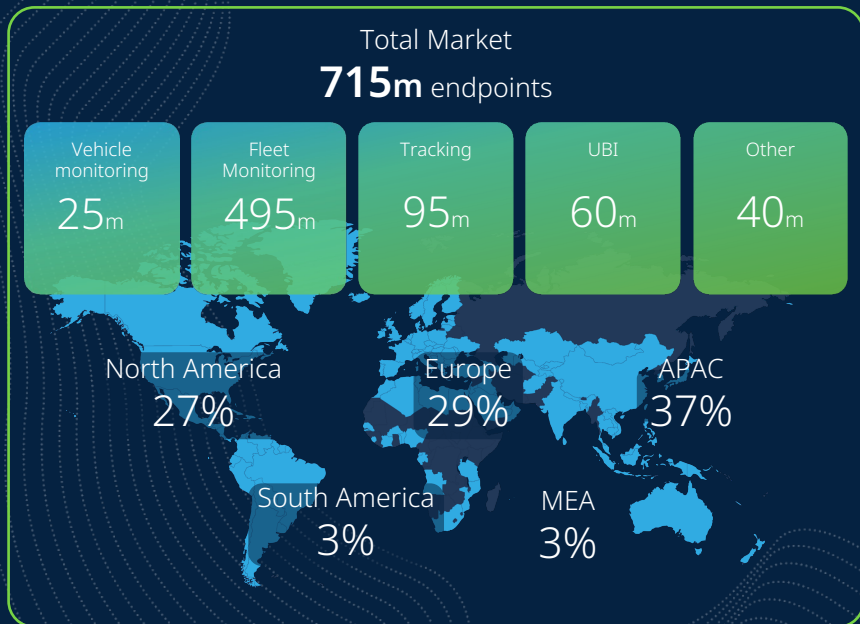
Market Insights, Best Practices, Player Overview along the Value Chain

March 2025

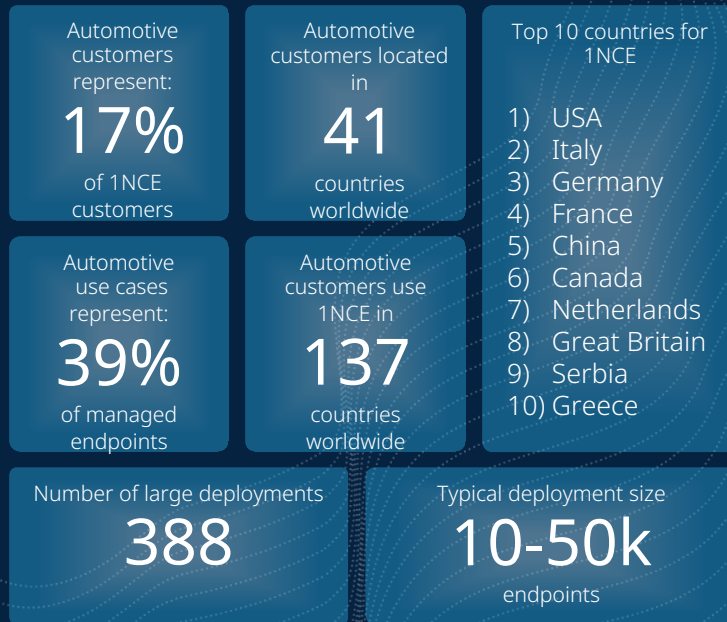


Automotive is a massive IoT industry requiring global coverage

Relevance of Automotive use cases for the IoT market:



1NCE's footprint in the Automotive sector:



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% | <ul style="list-style-type: none"> Electricity meters Gas meters | <ul style="list-style-type: none"> Water meters Leak prevention | <ul style="list-style-type: none"> Network monitoring Smart grid | asl always connected, cast4all T E C H N O L O G I E S |
| Infrastructure | 8% | <ul style="list-style-type: none"> Remote Maintenance for elevators | <ul style="list-style-type: none"> Solar Energy Monitoring Charging stations | <ul style="list-style-type: none"> Water and heating metering | OTIS, OCEA Smart Building, zonneplan, OLOXAM |
| Logistics | 7% | <ul style="list-style-type: none"> Asset tracking Temperature monitoring | <ul style="list-style-type: none"> Telemetry for vehicles Geo-fencing | <ul style="list-style-type: none"> Cold-chain monitoring | blulog, Tracking Spireon |
| Automotive | 17% | <ul style="list-style-type: none"> Usage based insurance Road-charging | <ul style="list-style-type: none"> Fleet management Car sharing | <ul style="list-style-type: none"> Stolen vehicle recovery Fuel level monitoring | VIMCAR, TARGA, PROCON |
| Industry | 9% | <ul style="list-style-type: none"> Oil monitoring Industrial automation | <ul style="list-style-type: none"> Tank monitoring Equipment monitoring | <ul style="list-style-type: none"> Industrial sensors | metasphere tracking data adults, autosen AUTOMATION & SENSORS |
| Agriculture | 7% | <ul style="list-style-type: none"> Remote analysis of bee colonies | <ul style="list-style-type: none"> Pest control Yield monitoring | <ul style="list-style-type: none"> Geofencing and alerting | BAVER, XFARM, eMitter |
| Smart Cities | 6% | <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 | FLASHNET An ENGAGE company, convadis |
| Healthcare | 2% | <ul style="list-style-type: none"> Health monitoring Refrigeration monitoring | <ul style="list-style-type: none"> Cleaning monitoring (hotels) | <ul style="list-style-type: none"> Digital signage | Zenitor MEDICAL SYSTEMS, MICRODEFENDER |
| Consumer | 7% | <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 | Sentinum FORGING FUTURE, switchee |
| Retail | 1% | <ul style="list-style-type: none"> Vending Machines Monitoring | <ul style="list-style-type: none"> Payment Processing | | Danfoss, CASYOPE SERVICES |

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 |  | France | Telematics Control Units (TCUs) provider | Link |
| Aptiv |  | Ireland | V2X (Vehicle-to-Everything) systems provider | Link |
| Continental |  | Germany | TCU, V2X Communication, and OTA Update provider | Link |
| Harman |  | USA | Telematics Platforms and V2X Communication Systems | Link |
| Denso |  | Japan | TCU, In-Vehicle Infotainment, and Cloud Services | Link |
| Hyundai Mobis |  | South Korea | Telematics Units and IVI Systems (navigation, integration) | Link |
| Magneti Marelli |  | Italy | Connected Car Platforms, incl. telematics & diagnostics | Link |
| 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 |  | Germany | Telematics systems & OEMs diagnostics provider | Link |
| Cerence |  | USA | Voice recognition & connected services (in-car assistants) | Link |
| Octo Telematics |  | Italy | Vehicle monitoring & insurance telematics | Link |
| PATEO |  | China | AI-powered in-vehicle solutions and connected platforms | Link |
| Sibros |  | USA | OTA updates, data collection, and diagnostics for OEM | Link |
| SiriusXM |  | USA | Emergency assistance, diagnostics, and infotainment | Link |
| Targa Telematics |  | Italy | Fleet management, tracking, and telematics | Link |

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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 |

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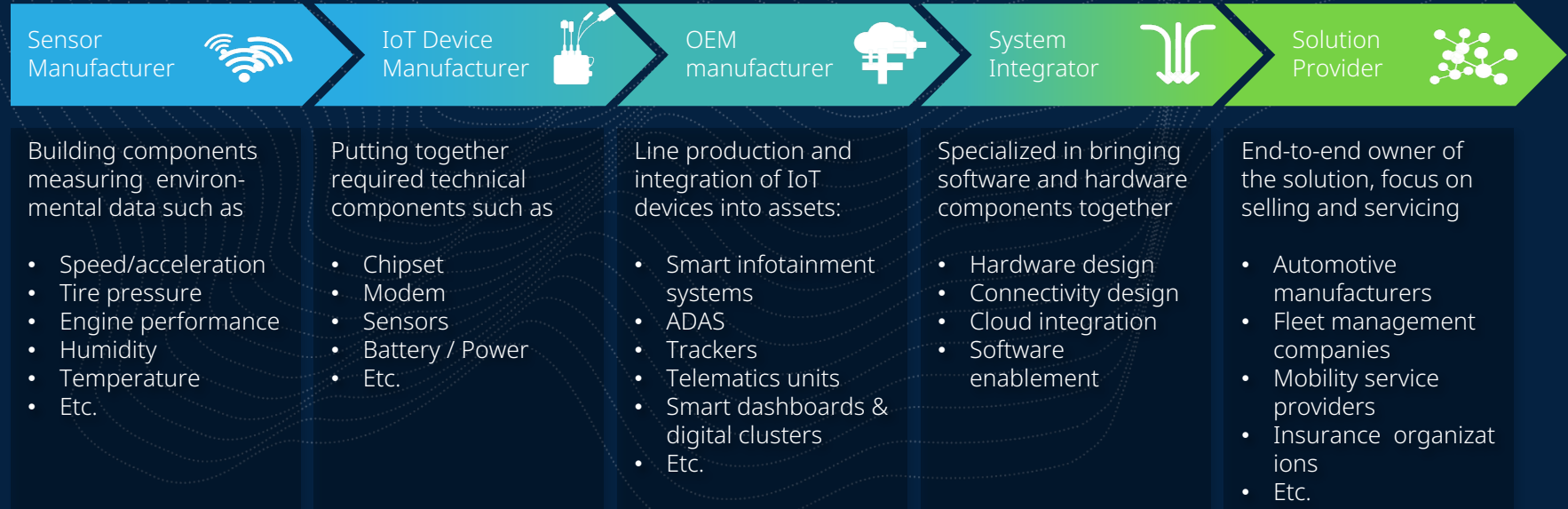
Players 1NCE is supporting in the field

| Player | | Use Case | More info |
|------------------|---|---|----------------------|
| Ikon |  | 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 |  | Asset management and car tracking solution | Link |
| 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 |  | Fleet management, car sharing, insurance telematics, and remote diagnostics across over 500,000 connected assets. | Link |
| ThinxNet |  | Real-time vehicle diagnostics, trip tracking, and location sharing without relying on external power | Link |
| TOPFLYtech |  | Large-scale transportation management with real-time data collection | Link |
| 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



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 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 €

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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