



Industry Playbook

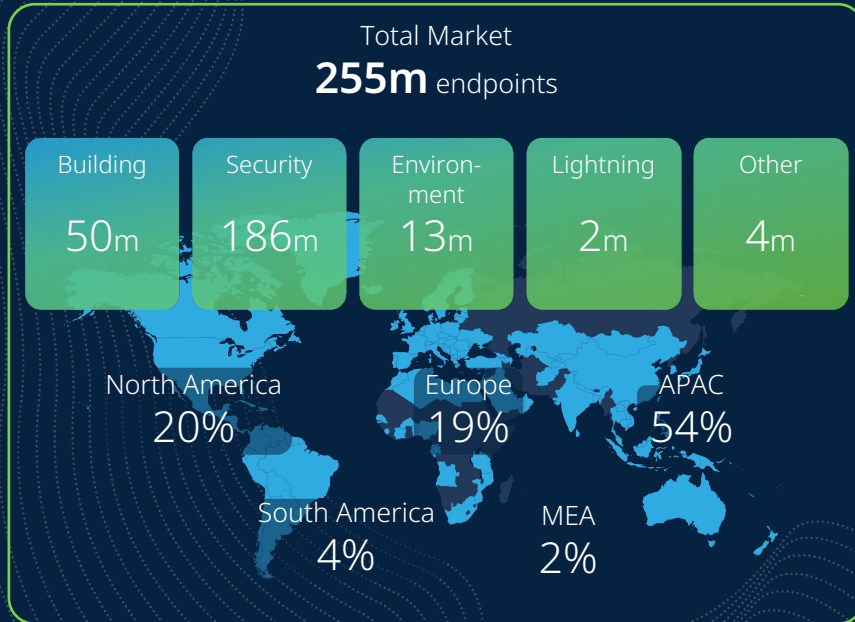
Infrastructure Edition

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

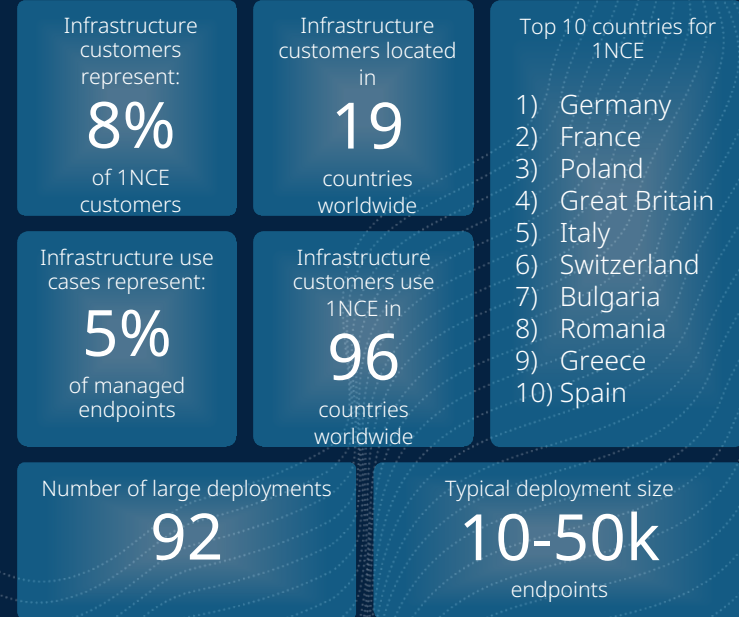
March 2025

Infrastructure is a massive IoT industry requiring global coverage

Relevance of Infrastructure use cases for the IoT market:



1NCE's footprint in the Infrastructure sector:



Sources: Market data courtesy of Transforma Insights, 1NCE Customer Insights
As of Jan 2025, 1NCE served 23,000 customers of which 8% are active in the infrastructure sector.

Common use cases supported are infrastructure monitoring, smart building, street lighting, waste management, etc.

The Infrastructure industry is a heavy weight in IoT

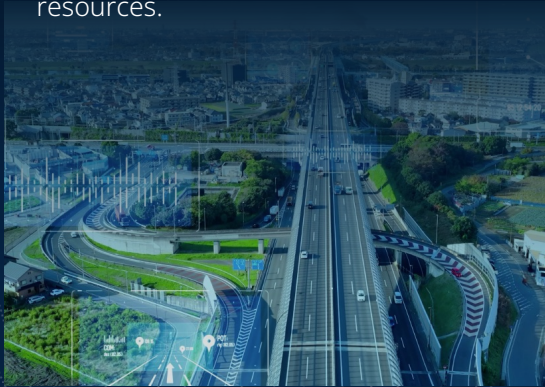
8% of our customers are building Infrastructure solutions

	Customers %	Typical applications			Selected customers
Utilities		• Electricity meters • Gas meters	• Water meters • Leak prevention	• Network monitoring • Smart grid	 
Infrastructure		• Remote Maintenance for elevators	• Solar Energy Monitoring • Charging stations	• Water and heating metering	  
Logistics		• Asset tracking • Temperature monitoring	• Telemetry for vehicles • Geo-fencing	• Cold-chain monitoring	 
Automotive		• Usage based insurance • Road-charging	• Fleet management • Car sharing	• Stolen vehicle recovery • Fuel level monitoring	  
Industry		• Oil monitoring • Industrial automation	• Tank monitoring • Equipment monitoring	• Industrial sensors	 
Agriculture		• Remote analysis of bee colonies	• Pest control • Yield monitoring	• Geofencing and alerting	  
Smart Cities		• Cost and energy reduction	• Water leakage monitoring	• Elevator management solutions	 
Healthcare		• Health monitoring • Refrigeration monitoring	• Cleaning monitoring (hotels)	• Digital signage	 
Consumer		• Indoor Wellbeing Monitoring	• Professional Coffee Machines' Monitoring	• Energy consumption monitoring	 
Retail		• Vending Machines Monitoring	• Payment Processing		 

Key IoT use cases in Infrastructure

Infrastructure Monitoring

Infrastructure management involves overseeing critical systems like roads, bridges, HVAC, and energy management with IoT technology. Smart monitoring uses sensors and real-time analytics to detect issues, predict maintenance, and optimize resources.



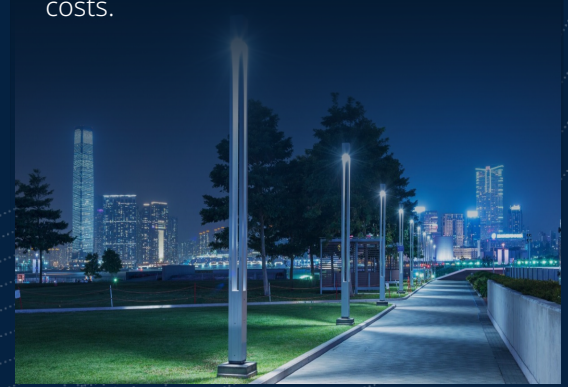
Smart Building

Smart building and building automation imply the automated control of electrical, mechanical, and HVAC systems within buildings for energy efficiency and occupant comfort. Sensors and IoT devices adjust lighting, temperature, and ventilation based on real-time conditions and occupancy.



Street Lighting

IoT-based smart street lighting systems contribute to public safety and energy efficiency by using sensors, adaptive brightness, and remote control. They can automatically adjust illumination based on time, weather, or activity, reducing energy consumption and costs.



Key IoT use cases in Infrastructure

Waste Management

Smart waste management solutions use IoT-enabled sensors and data analytics to optimize collection routes and monitor bin levels in real time. This reduces operational costs, minimizes environmental impact, and improves service quality. Advanced systems also enable waste sorting and recycling for more sustainability..



Community Heating

Efficient monitoring, distribution, and metering of heat in community heating grids, ensuring cost-effective and eco-friendly solutions.



Environmental Monitoring

Real-time monitoring of environmental metrics like temperature, air quality, and noise levels to enhance sustainability and well-being.



Overview of players with traction in the market

Key players in HVAC & Energy Management

Player	Logo	Location	Description	Website
75F		USA	Smart HVAC and energy optimization provider	Link
Autani		USA	Energy management and building automation provider	Link
Automated Logic		USA	Building automation and HVAC control service	Link
Building IQ		Australia	AI-based HVAC and energy optimization company	Link
Cimetrics		USA	Energy management and HVAC analytics provider	Link
Distech Controls		Canada	Integrated systems for HVAC and energy management	Link
Entouch Controls		USA	Cloud-based energy and HVAC management system	Link
KMC Controls		USA	HVAC efficiency provider	Link
Lynxpring		USA	Advanced HVAC and energy management systems	Link

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

Overview of players with traction in the market

Specialized players in **Smart Building**

Player	Logo	Location	Description	Website
ABB		USA	Automation and control solutions for smart buildings	Link
Bosch		USA	Building automation, security, energy management	Link
Honeywell		USA	Integrated building management systems	Link
Johnson Controls		Iceland	Building control: HVAC, energy and fire protection	Link
Kieback&Peter		USA	Climate, energy efficiency, building systems control	Link
Schneider Electric		USA	Building analytics platform for optimized performance	Link
Siemens		USA	Smart building solutions for integrated control	Link

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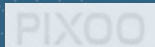
Overview of players with traction in the market

Key players in **Waste Management**

Player	Logo	Location	Description	Website
BH Technologies		USA	Solutions for waste collection routes optimization	Link
Bigbelly		USA	Smart waste and recycling services	Link
Bintel		Australia	Waste monitoring systems provider	Link
Dingtek Technology		China	Intelligent waste bins and collection systems	Link
Ecube Labs		South Korea	Solar-powered compacting bins provider	Link
Roadrunner		USA	Fully-managed waste and recycling services	Link
Evreka		Turkey	Intelligent waste management software	Link

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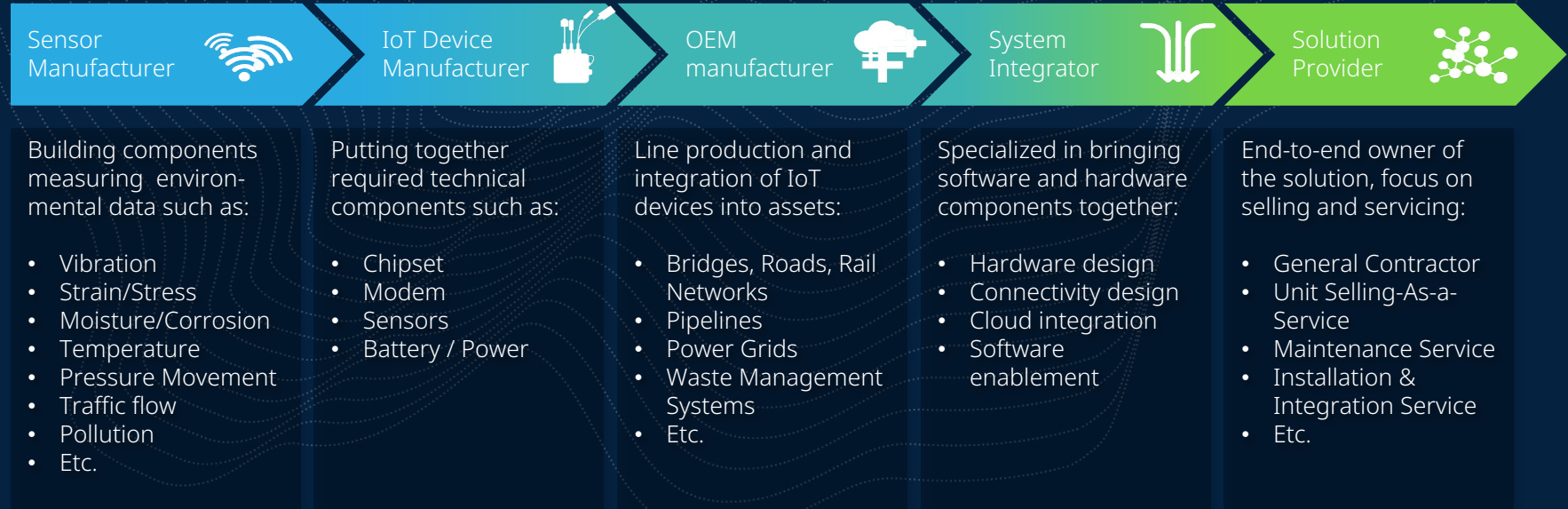
Players 1NCE is supporting in the field

Player		Use Case	More info
ABO Wind		Centralized, software-based control and monitoring of wind turbine access	Link
Wattsense		Real-time monitoring and control of HVAC, lighting, and more via cloud connectivity	Link
FP Group		Condition monitoring and preventative maintenance services to remotely monitor contamination in oil systems	Link
Ecomesure		Air monitoring in public spaces, industrial sites, and other environments	Link
Inovasens		Managing and operating sensory devices during events, including scent diffusers and smoke vortex cannons.	Link
ShieldFi		Fraud prevention in the financial and telecom sectors	Link
Sensoneo		Waste management across the large number of bins in real-time	Link
Pixoo		IoT-based monitoring in stores, offices, and accommodation facilities	Link
Powerdot		Developing and operating electric vehicle (EV) charging infrastructure	Link

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

Understanding the roles of players along the value chain

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



1NCE has a dedicated offering for Smart Agriculture

	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 costs • 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

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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