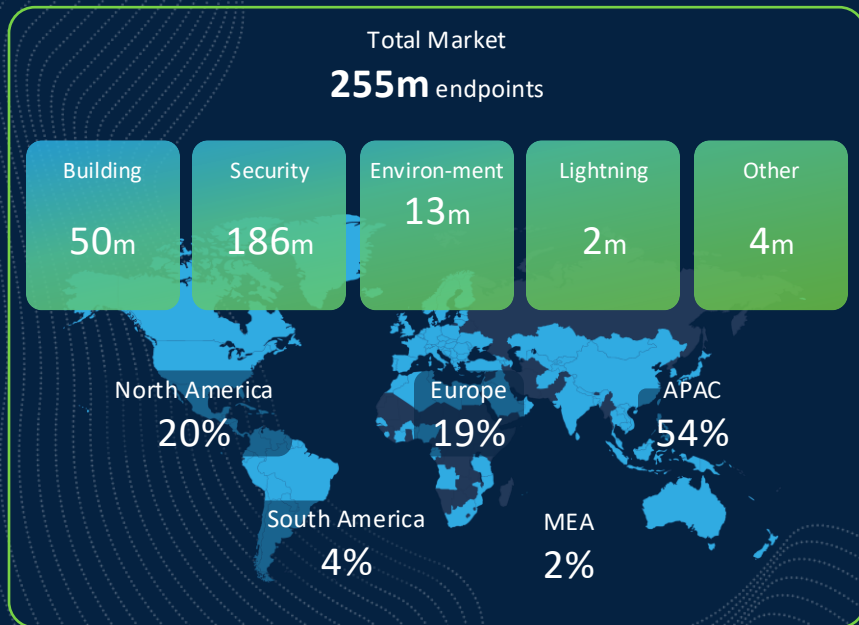# 1NCE®

Industry Playbook

Infrastructure Edition

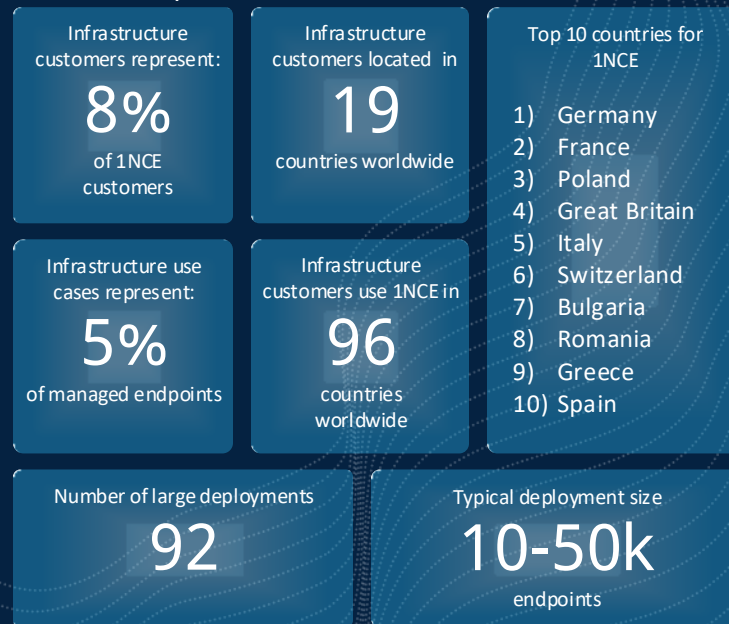Market Insights, Best Practices, Player Overview along the Value Chain

March 2025

Infrastructure is a massive IoT industry requiring global coverage

Relevance of Infrastructure use cases for the IoT market:

Total Market
255m endpoints

Building	Security	Environ-ment	Lightning	Other
50m	186m	13m	2m	4m

North America **20%**

Europe **19%**

APAC **54%**

South America **4%**

MEA **2%**
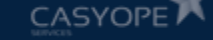
1NCE's footprint in the Infrastructure sector:

Infrastructure customers represent:
8%
of 1NCE customers

Infrastructure customers located in
19
countries worldwide

Top 10 countries for 1NCE
1) Germany
2) France
3) Poland
4) Great Britain
5) Italy
6) Switzerland
7) Bulgaria
8) Romania
9) Greece
10) Spain

Infrastructure use cases represent:
5%
of managed endpoints

Infrastructure customers use 1NCE in
96
countries worldwide

Number of large deployments
92

Typical deployment size
10-50k
endpoints

The Infrastructure industry is a heavy weight in IoT
8% of our customers are building Infrastructure solutions

	Customers %	Typical applications			Selected customers
Utilities	20%	• Electricity meters • Gas meters	• Water meters • Leak prevention	• Network monitoring • Smart grid	asl, »cast4all
Infrastructure	8%	• Remote Maintenance for elevators	• Solar Energy Monitoring • Charging stations	• Water and heating metering	OCEA, zonneplan, LOXAM
Logitics	7%	• Asset tracking • Temperature monitoring	• Telemetry for vehicles • Geo-fencing	• Cold-chain monitoring	blulog, Trackting
Automotive	17%	• Usage based insurance • Road-charging	• Fleet management • Car sharing	• Stolen vehicle recovery • Fuel level monitoring	VIMCAR, TARGA
Industry	9%	• Oil monitoring • Industrial automation	• Tank monitoring • Equipment monitoring	• Industrial sensors	metasphere, autosen
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, 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		CASYOPE SERVICES

% of Customers in the other verticals – 16%

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.
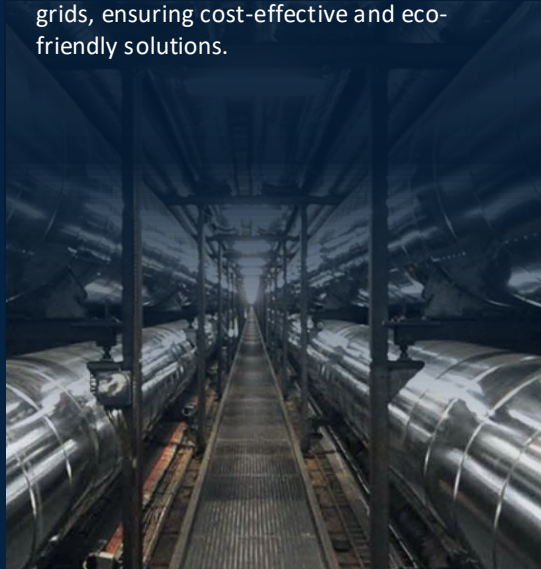
Environmental Monitoring

Real-time monitoring of environmental metrics like temperature, air quality, and noise levels to enhance sustainability and well-being.
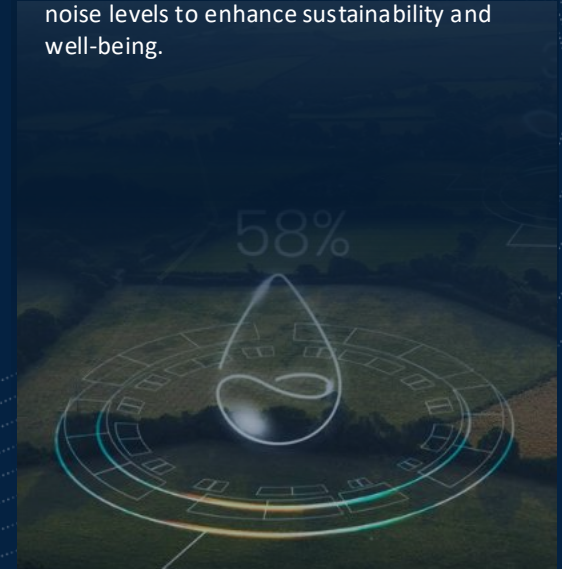
Overview of players with traction in the market

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

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

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

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

Players 1NCE is supporting in the field

Player		Use Case	More info
ABO Wind	ABO WIND	Centralized, software-based control and monitoring of wind turbine access	Link
Wattsense	[ϟ] wattsense	Real-time monitoring and control of HVAC, lighting, and more via cloud connectivity	Link
FP Group	FG GROUP	Condition monitoring and preventative maintenance services to remotely monitor contamination in oil systems	Link
Ecomesure	ECOMESURE	Air monitoring in public spaces, industrial sites, and other environments	Link
Inovasens	INOVA SENS	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	((SENSONEO))	Waste management across the large number of bins in real-time	Link
Pixoo	PIXOO	IoT-based monitoring in stores, offices, and accommodation facilities	Link
Powerdot	pwdt	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

Sensor Manufacturer	IoT Device Manufacturer	OEM manufacturer	System Integrator	Solution Provider
Building components measuring environmental data such as:	Putting together required technical components such as:	Line production and integration of IoT devices into assets:	Specialized in bringing software and hardware components together:	End-to-end owner of the solution, focus on selling and servicing:
• Vibration • Strain/Stress • Moisture/Corrosion • Temperature • Pressure Movement • Traffic flow • Pollution • Etc.	• Chipset • Modem • Sensors • Battery / Power	• Bridges, Roads, Rail Networks • Pipelines • Power Grids • Waste Management Systems • Etc.	• Hardware design • Connectivity design • Cloud integration • Software enablement	• General Contractor • Unit Selling-As-a-Service • Maintenance Service • Installation & Integration Service • Etc.

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 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

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
eUICC
2.00 €

Chip
eUICC
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 €

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

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 — **T** Deutsche Telekom AG
- USA — **T** T-Mobile US
- Asia — SoftBank
- China — 中国电信 CHINA TELECOM
- 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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