Introduction

Cologne – Miami - Tokyo

6/7/2024

1 About 1NCE

Establishing a new standard for IoT

Fast

👥 **18,000+** customers won in **6 years**

👥 **400+** team across Europe, Asia and US

🔗 **22+** million managed endpoints

📈 **+300%** year on year growth

Fastest growing IoT Service Provider*

> "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

  – Europe   **T** Deutsche Telekom AG

  – USA   **T** T-Mobile US

  – Asia   **SoftBank**

  – China   中国电信 CHINA TELECOM

  – Further partners tba

Everywhere

Can be used for nearly all IoT applications

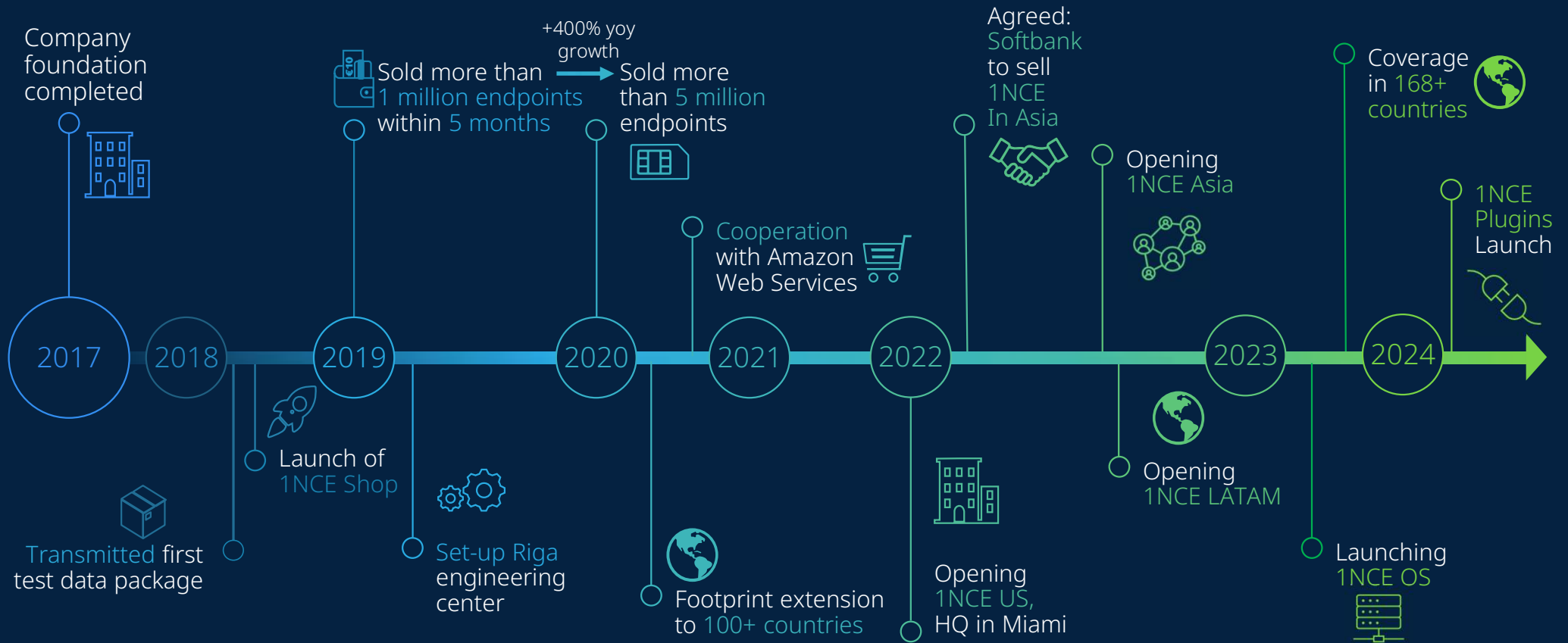|			
Smart Agriculture	Waste Management	Industrial Automation	Fleet Telematics
Smart City	Tracking	AR / VR	Smart Buildings
Infrastructure monitoring	Smart Metering	Remote Monitoring	Tracking Devices

> "1NCE has proven to deliver IoT Connectivity that meets our high expectations in terms of flexibility, reliability and worldwide coverage."
>
> *Alberto Falcione, Vice President Sales, Targa Telematics*

* Source: Berg Insight

Fast product deployments and ongoing footprint extension

Company foundation completed

Sold more than 1 million endpoints within 5 months

+400% yoy growth

Sold more than 5 million endpoints

Agreed: Softbank to sell 1NCE In Asia

Coverage in 168+ countries

Opening 1NCE Asia

1NCE Plugins Launch

Cooperation with Amazon Web Services

2017   **2018**   **2019**   **2020**   **2021**   **2022**   **2023**   **2024**

Launch of 1NCE Shop

Transmitted first test data package

Set-up Riga engineering center

Footprint extension to 100+ countries

Opening 1NCE US, HQ in Miami

Opening 1NCE LATAM

Launching 1NCE OS

5

1NCE executive management are connected products experts and experienced entrepreneurs
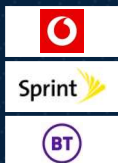
Alexander P. Sator
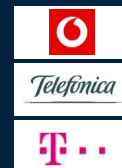Group CEO

Drive strategy and best cap table

Thorsten Zeiske
Group CFO

Finance the growth and drive margins

Ivo Rook
Group COO

Customers expansion and best workforce

Younes Allaki
Group CTO

Best products on scalable technology

2 What we do

Today's IoT challenges

IoT Characteristics

1 Deployed extensively / globally

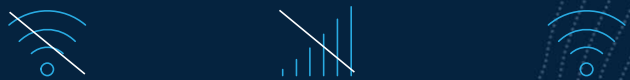**2** Large device estate

3 Low value devices / assets

4 Long device lifecycles

Customer Pain Points

Limited or unreliable coverage

High maintenance

High connectivity costs (OPEX)

Traditional Cellular	Unlicensed LPWA	Licensed LPWA
2G 3G 4G 5G	LoRa INGENU Wi-SUN sigfox	LTE-M NB-IoT

VS. VS.

Future technology uncertainty

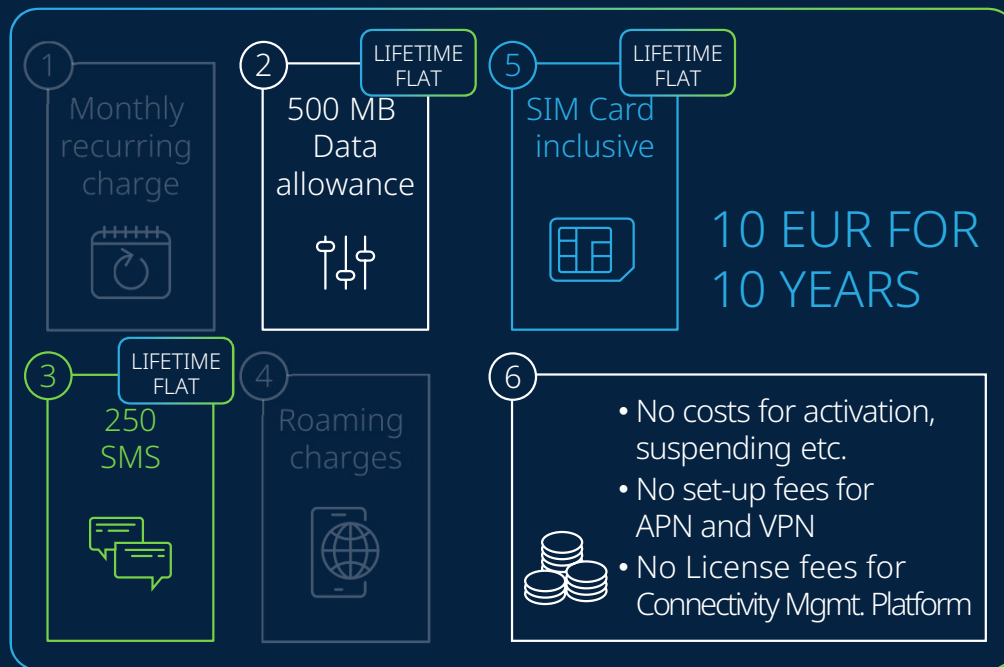# 1NCE makes high-quality IoT connectivity simple and cost-effective

1NCE Proposition

1 **Global coverage**
- ✓ 1NCE connectivity available in 150+ countries globally
- ✓ Access to multiple networks in each country
- ✓ No additional charges for roaming

2 **Ease of use**
- ✓ One SIM covers all your needs – with no SIM activation needed
- ✓ Manage connection via API or Connectivity Management Platform
- ✓ No minimum order, order on-demand

3 **Lowest cost**
- ✓ Exceptional value 10 EUR for 10 years 1NCE IoT Lifetime Flat
- ✓ All features already included (Data, SMS, SIM Card, Data Streamer, API, Data Management Tools etc.)
- ✓ No hidden costs – TCO friendly, no monthly invoices

4 **Multi-bearer support**
- ✓ Seamless support of 2G, 3G, 4G, LTE-M and NB-IoT
- ✓ Optimized for multi-mode set-ups (e.g. combine 2G with NB-IoT)
- ✓ Allows for seamless transition between radio-standards

1NCE changes how customer consume IoT services

1NCE pricing model

One time fee only: 1NCE LIFETIME FLAT

① Monthly recurring charge

② **LIFETIME FLAT** — 500 MB Data allowance

⑤ **LIFETIME FLAT** — SIM Card inclusive

10 EUR FOR 10 YEARS

③ **LIFETIME FLAT** — 250 SMS

④ Roaming charges

⑥
- No costs for activation, suspending etc.
- No set-up fees for APN and VPN
- No License fees for Connectivity Mgmt. Platform

Traditional pricing structure

Recurring fees

① Monthly Hosting Fee

② Data plan

③ SMS

④ Roaming charges

One time fee

⑤ SIM Card Costs

⑥ Additional costs

- Activation fees
- Suspending fees
- Re-activation fees
- Set-up fees
- License fees
- Other fees

10
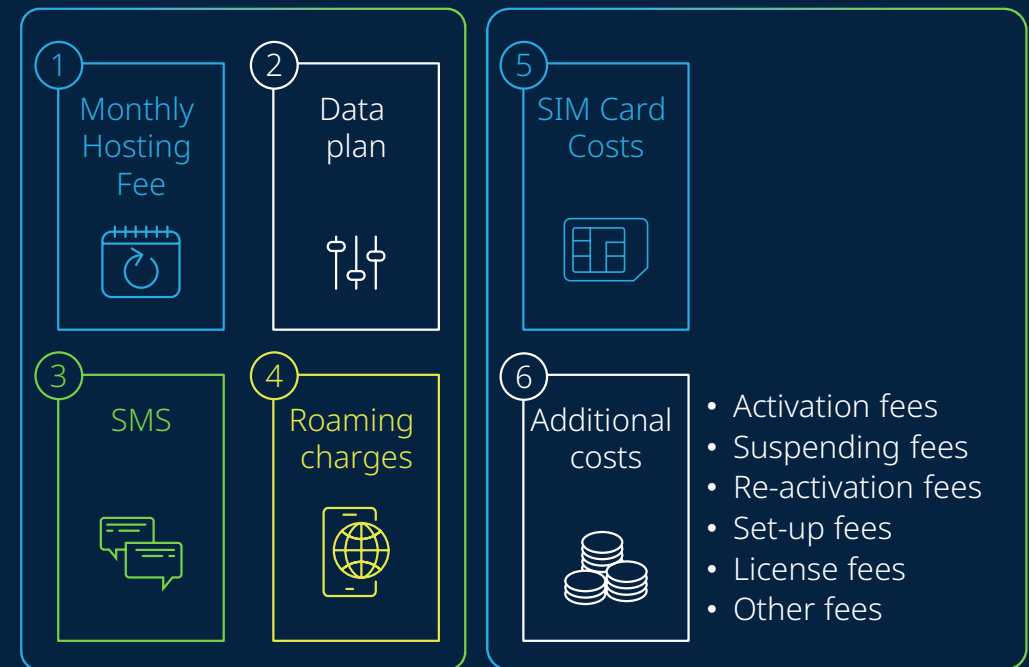
3 What we offer

All features to connect a device for 10 years for 10 EUR

Lifetime

For as little as

10 EUR

Included Usage of

10 Years

Flat

SIM Card   500 MB   250 SMS   API

Coverage +168 countries   Security Features (e.g. VPN)

Connectivity Management Platform   1NCE OS Software Tools
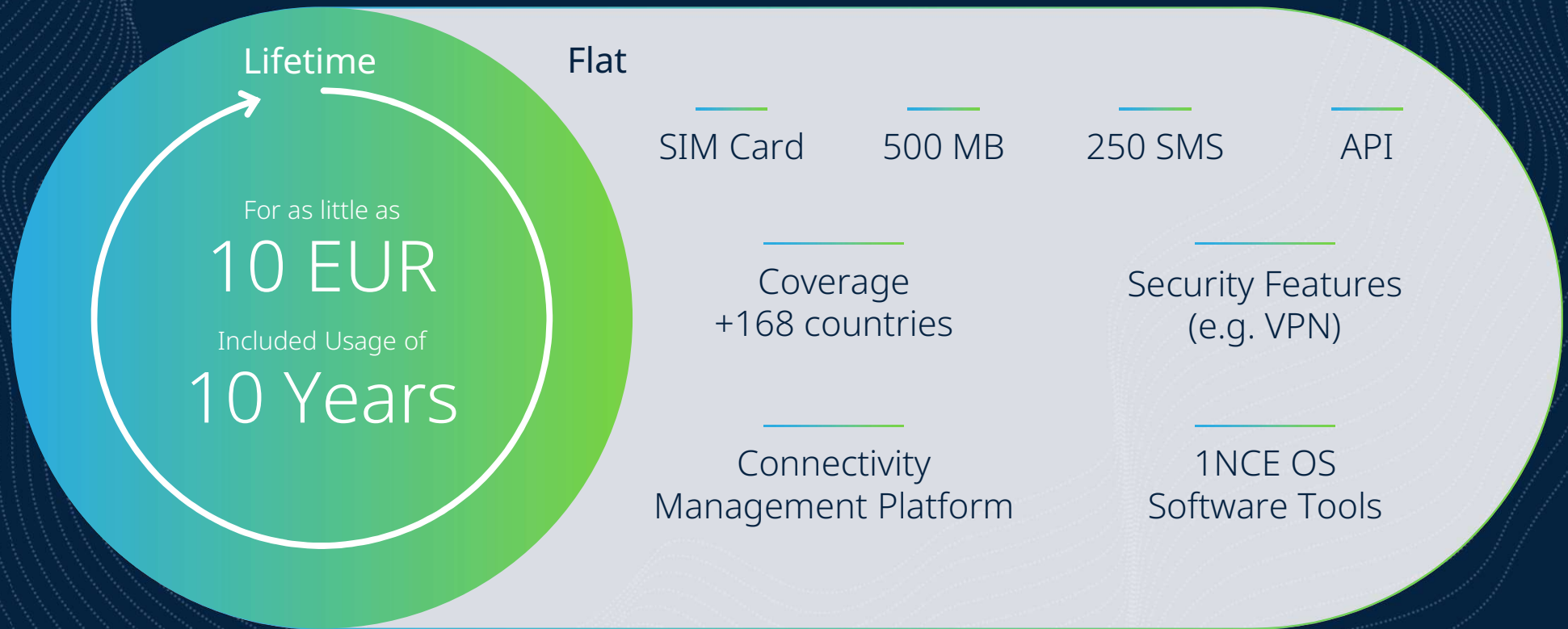
We have the best value offering in the IoT market

1NCE lifetime flat
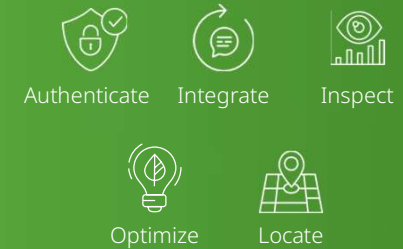(10$ for 10 years)
Connectivity & Software tools for life

1NCE Connect

IoT Connectivity
for collecting data
from millions of sensors

1NCE OS

IoT Software tools for
transforming data
into intelligence

Authenticate   Integrate   Inspect

Optimize   Locate

For just $ 10 for 10 years, customers receive the industry's best bang for the buck.
1NCE value proposition includes both IoT Connectivity and Software tools.

Usable in more than 168 countries

Legend:
- 2G, 3G, 4G
- 2G, 3G, 4G and LTE-M or NB-IoT
- Not covered yet
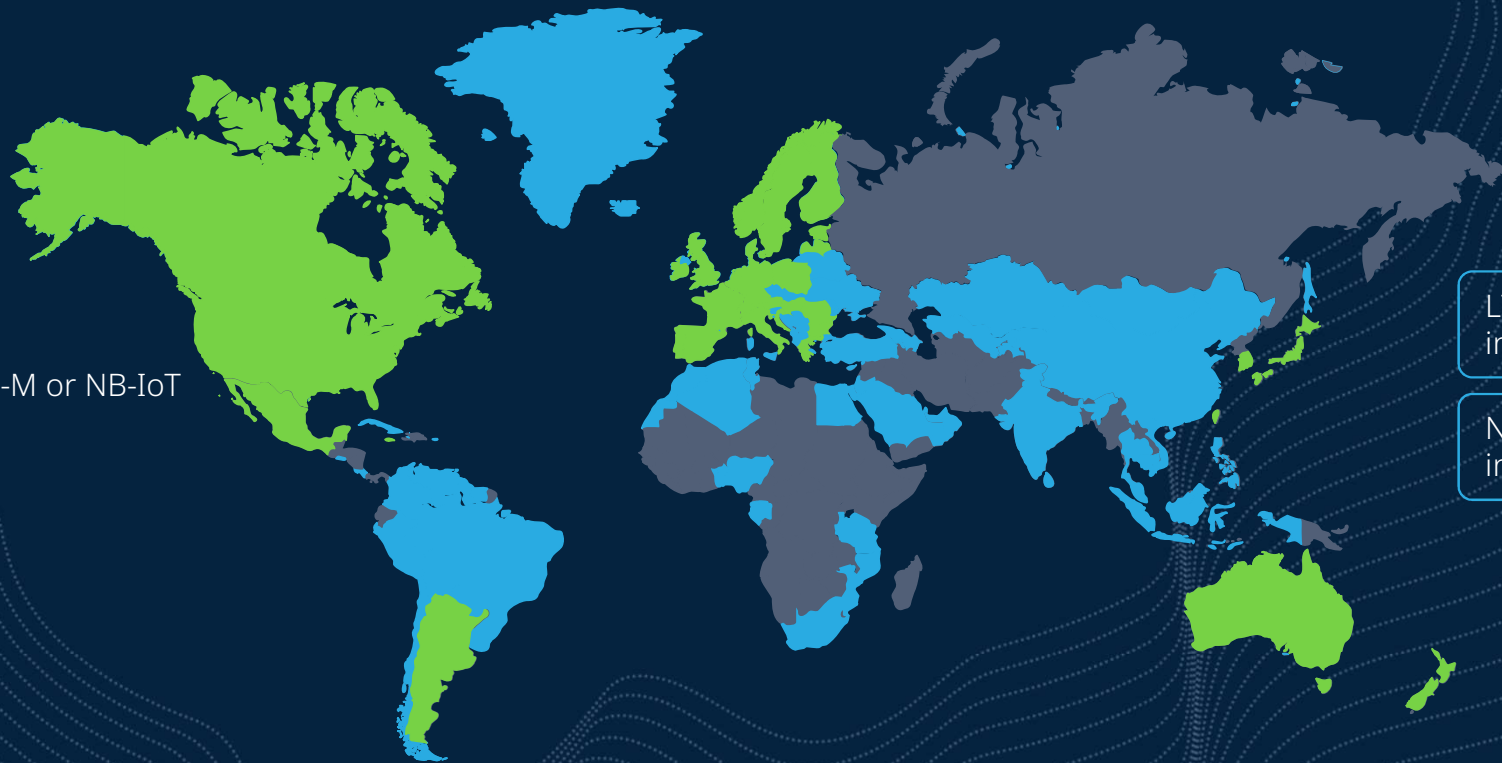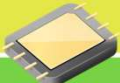
LTE-M Coverage in 32 Countries

NB-IoT Coverage in 30 Countries

🔒 https://1nce.com/en-eu/1nce-connect/our-coverage

1 means 2G and/or 3G and /or 4G   2 means 2G and/or 3G and /or 4G and/or LTE-M and/or NB-IoT

Freedom to switch adds eUICC to our SIM stock

	Standard	Freedom to Switch	
	SIM Card (Plastic)	**SIM Chip**	
Material grade	Business	Industrial	Industrial
Form Factor	3-in-1	3-in-1	MFF2
eUICC capable	NO	YES	YES

1NCE platform
All necessary
features at a glance
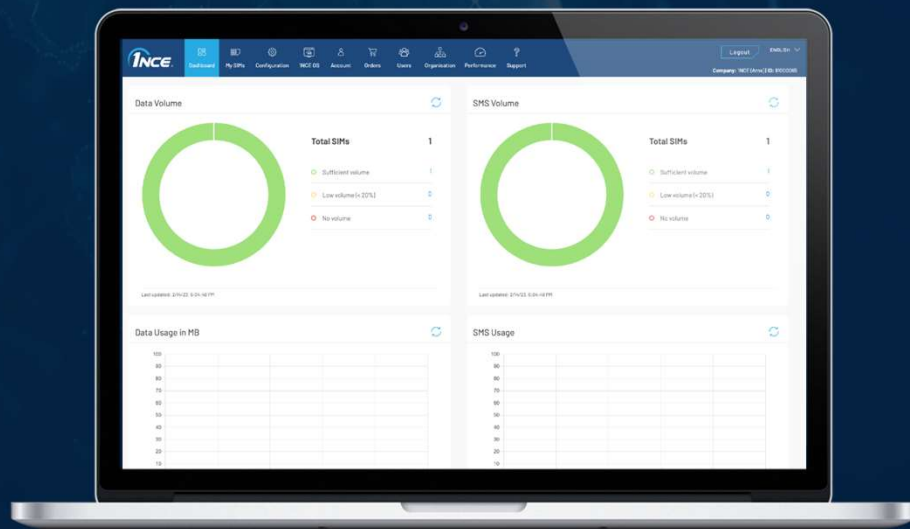
Monitor and control remaining volume and activation periods

Integrate all functions into external system via REST API

Manage account settings such as billing address or contact details

Get real-time data via Data Streamer

Create user profiles or sub organizations

Onboard your IoT devices easily via Connectivity Suite

Purchase additional SIM cards

No monthly cost monitoring **thanks to the pre-paid IoT flat rate**

1NCE OS is a compelling software set for IoT customers

Device Authenticator — Authenticate

Problem: Secure authentication and unique identification of devices

Solution: SIM card as secure element

Features: SIM-as-an-Identity, Bootstrapping, Upstream Cloud Registration

IoT Integrator — Integrate

Problem: Effort and complexity of reliably connecting IoT devices to customer cloud systems

Solution: Managed Protocol Translation

Features: UDP, CoAP, LwM2M, AWS IoT Core, Webhooks

Device Inspector — Inspect

Problem: Truck roll, support in-field IoT devices

Solution: Remote access of device states and recent telemetry

Features: Buffered Messages, Historian, State

Device Locator — Locate

Problem: Geographically locating in-field IoT devices without GPS antenna

Solution: Cell tower-based positioning

Features: Cell ID, Geofence, Tracking

Energy Saver — Optimize

Problem: Lifetime of battery-powered IoT devices

Solution: Optimized Payload Transmission

Features: Binary Unpacker

APIs — UX

Problem: Natively integrate 3rd party functionality into own solution

Solution: Programmable Interfaces

Features: Management API

1NCE OS unlocks multiple business benefits for customers

Time-to-Market

Connected products require a lot of generic IoT logic.

By using 1NCE OS ready-to-use IoT software tools, customers can release their products up to 4 months quicker.

Resource Allocation

Developers should focus on their own business logic, not IoT logic.

By outsourcing the latter to 1NCE OS, customers can free up to 5 FTEs in the development phase.

Cost Savings

IoT logic must be built or purchased. Both options can be very expensive.

As 1NCE OS is included in the 1NCE offer, customers can save up to 60% of their TCO.

Risk Mitigation

Building and managing IoT products can be risky (bugs, security, etc).

Customers can rely on 1NCE's expertise to mitigate these risks related to IoT.

1NCE OS allows customers to save time, workforce and costs – while supporting to build better products

Numbers show savings compared to customer implementation projects without additional tools or services for IoT

1NCE network integration simplified (data)
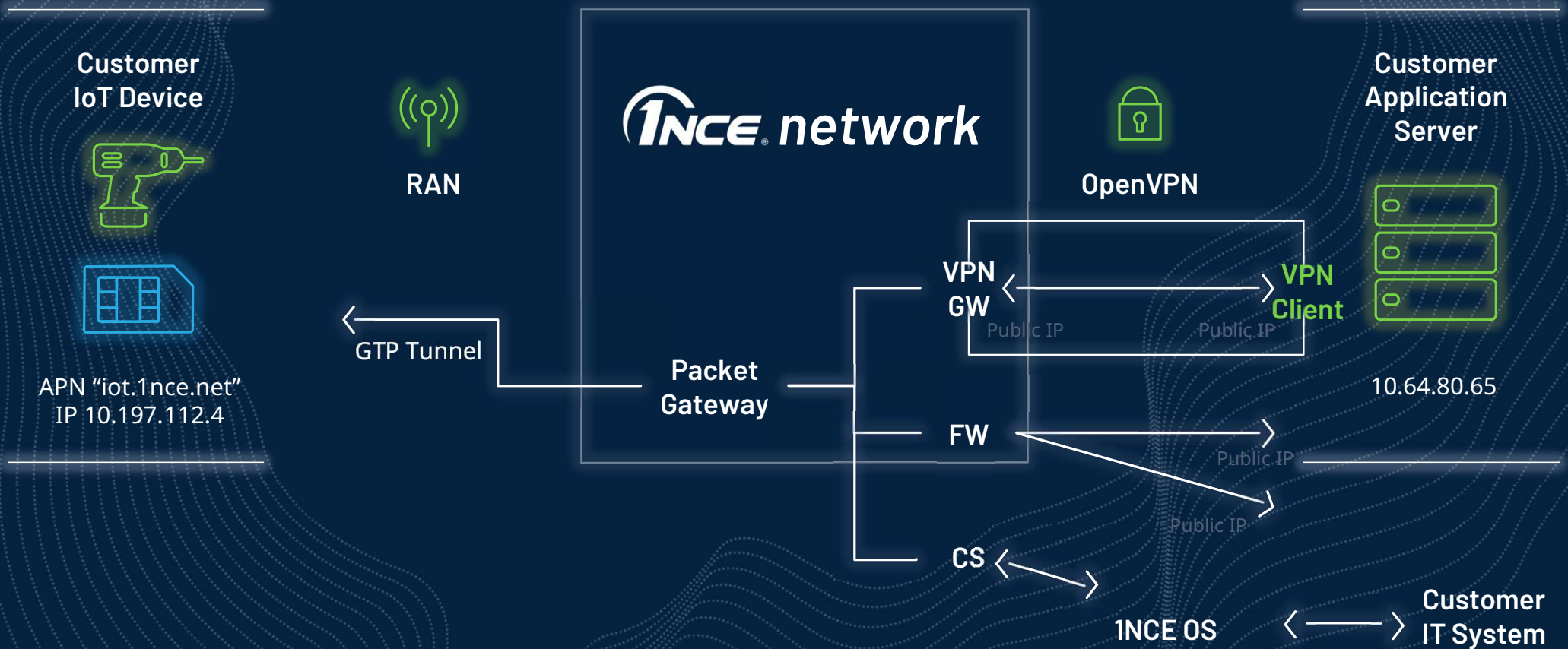
Customer IoT Device

RAN

1NCE network

OpenVPN

Customer Application Server

VPN GW

VPN Client

Public IP

Public IP

GTP Tunnel

APN "iot.1nce.net"
IP 10.197.112.4

Packet Gateway

FW

10.64.80.65

Public IP

Public IP

CS

1NCE OS

Customer IT System

4 What we have achieved so far

1NCE has sales, production and service across the globe

Americas
Miami,
São Paulo,
Montevideo

APAC
Tokyo
Hong Kong
Singapore

Europe
Cologne, Hamburg,
Riga, Rome,
London, Madrid,
Paris, Warsaw

Truly global customer base

More than **70%** of our customers operate internationally

18.000 customers

22m managed end points

168 covered countries

40% of Customers use their endpoints in +10 countries

Multiple verticals
Logistics, Fleet, Utilities, Infrastructure, Solar, Charging Agriculture

Digital self serve model

+650,000 website visitors in 2023 alone, which generated 30,000 orders

Web shop processed 23,000,000 workflows for customers in 2023

Serviced digitally by 30 FTE in service

In short: 1NCE is an IoT powerhouse

Global

Europe

130 FTE
Cologne (HQ)

10 FTE
Hamburg (Market Unit)

58 FTE
Remote (Sales)

140 FTE
Riga / Latvia (Software Development)

Americas

10 FTE
Miami (HQ)

10 FTE
Remote USA (Sales)

15 FTE
Montevideo (Software development)

10 FTE
São Paulo (Market Unit)

Asia

11 FTE
Tokyo (HQ)

3 FTE
Singapore (Market Unit)

3 FTE
Hong Kong (Branch)

Diverse

Team from
40
nationalities

Working from
38
countries

Experts

Supporting
26
languages

70%
Developers and Engineers

Global Team
from 150 to

400 FTE

Serving 12% of Global Fortune 500 companies

Customer base
(# of customer cumulative in k)

2,600 — 2019

4,400 — 2020

7,500 — 2021

12,200 — 2022

18,000 — 2023

Our customers change the world

Flashnet

- Smart City, Washington DC
- 70k Streetlights, NB-IoT
- Cost and energy reduction

Procon Analytics

- Fleet Telematics provider US
- +1m endpoints contract
- Develops new products on 1NCE

Bayer Healthcare
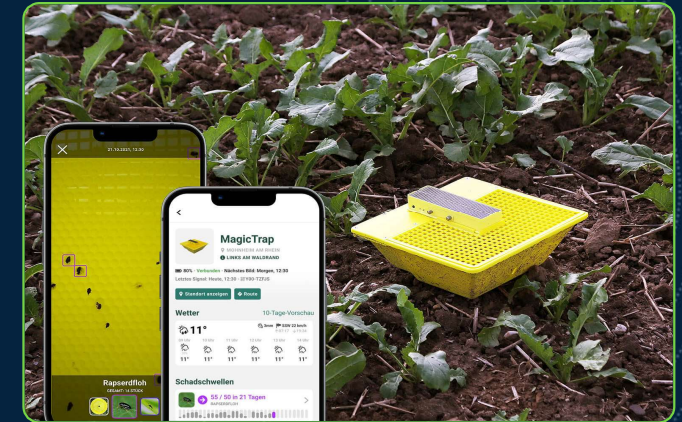
- Smart Agriculture EU
- +10k smart crop sensors
- Reduces pest infestations by 20%

Customers are building new and disruptive products using our platform

5 The idea behind 1NCE

The Internet of Things is centered in the midfield of technological battle grounds

*I*nternet ⟶ Telco —to⟶ Software

Of

*T*hings ⟶ Device —to⟶ Cloud
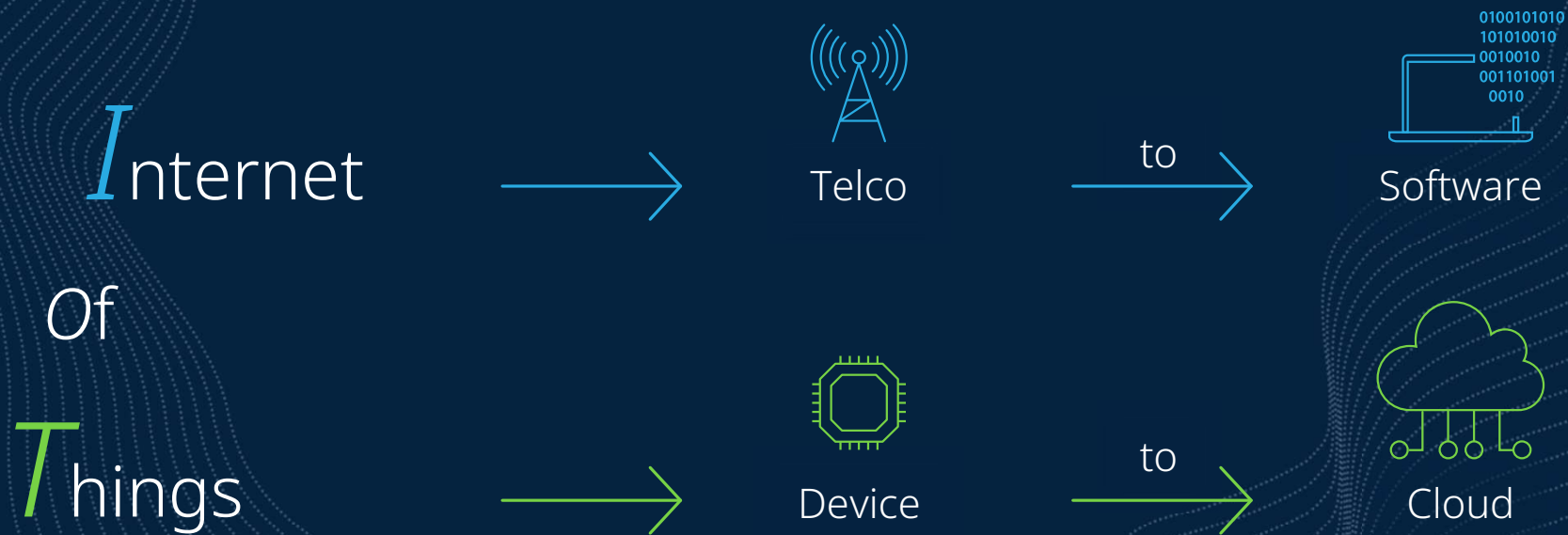
1NCE addresses 10 of the 14 IoT challenges

McKinsey & Company identified 14 factors that have impact on the success of connected products[1]

Technology performance	Interoperability	Installation	Change Management	Power performance	Cost	Connectivity performance
Talent	Cybersecurity	Privacy and confidentiality	Public policy	Perceived value proposition	Value achieved	Incentive management
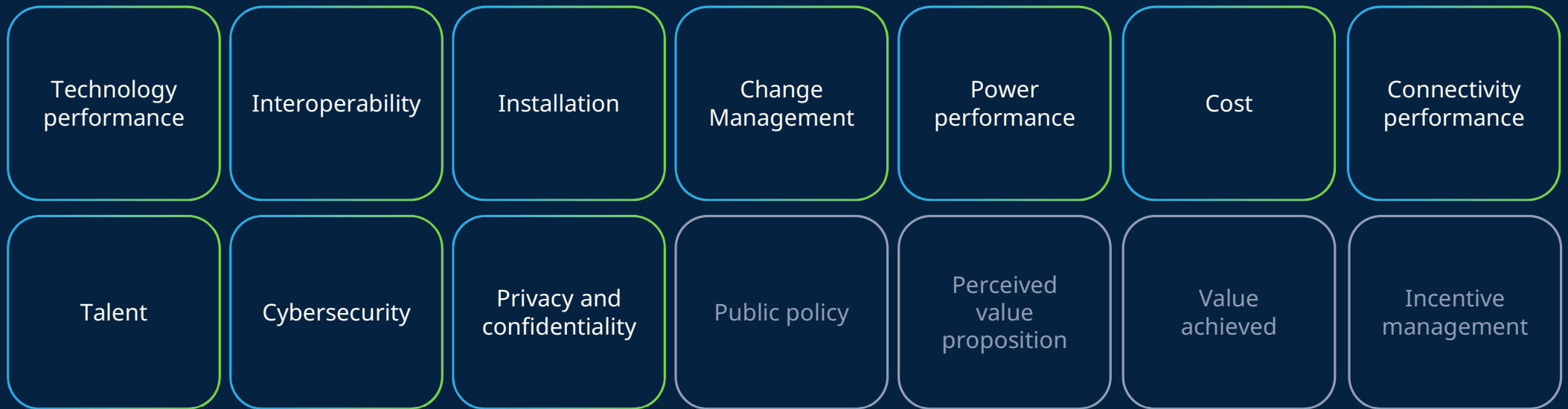
1NCE directly addresses 10 of the 14 factors on a global scale

1   Impact factors taken from McKinsey & Company: The Internet of Things: Catching up to an accelerating opportunity. Nov 2021, p 15-17

Connected products will run on cloud-based infrastructure, not on operator networks

2010	Invent	2015	Adopt	2020	Embed	2025	New normal

Network ─── Software

Network based innovation:

Connect something new or in a new way

Businesses add new use cases:

New use cases drive net new growth for operators

Businesses embed tech in products/processes:

Operators struggle to deliver outside footprint, limiting growth to offset margin erosion

The new technology is global Business as usual:

Software players provide global consistent service, reduce network to "local loop" and achieve superior economics

History will repeat itself

Messaging, invented by operators, simplified by Twillio, globalized by iMessage and WhatsApp

Unified Coms, invented by operators, simplified and globalized by Zoom, Skype and Teams

IoT, invented by operators, will not scale unless provided on truly global scale, we believe operators will struggle to keep up

Contact Information

Thomas van den Berg

📞 +49 151 53347180

✉️ Thomas.vandenberg@1nce.com

Introduction Day 2

Cologne – Miami - Tokyo

6/7/2024

1   Customer Portal and DevHub

2   China+ IoT sim

3   Brasil IoT sim

4   High Data IoT

5   Customer Care

1 Customer Portal and DevHub

2 China+ IoT sim

China+ in a nutshell

1. Multi IMSI SIM:
    1. Local IMSI for CN, HK, TW, MAC
    2. Standard 1NCE Roaming Footprint for all other countries
    3. Automatic switch of IMSI, adapted view in Customer Portal
2. Standard €10 pricing
3. Growing level of localization available
4. Payment process adapted (SWIFT)
5. Local Marketing approach

Coverage changes of China+ vs. 1NCE Standard

1NCE China+

- China Telecom (4G & NB IoT)

- Hong Kong = CSL (2G, 3G and 4G)

- Taiwan = Chunghwa Telecom (3G and 4G)

- Macao = China Telecom (Macao) (4G only)

GSIM – 1NCE Standard

- China = China Unicom; China Mobile (2G, 3G, 4G)

- Hongkong = Hutchinson, HKT (2G, 3G, 4G – only Hutch w/ 4G)

- Taiwan = Far Eastone, Chunghwa, Taiwan Mobile, Taiwan Star (2G/3G/4G)

- Macao = No Coverage

Pro

NB-IoT in China
Permanent roaming
Coverage in Macao

Cons

no 2G & 3G in China

no 2G in Taiwan
Only 1 MNO per country

3 Brasil IoT sim

Challenges global cellular IoT companies face in Brazil

Local legislation & regulation

- Requires to be licensed by Anatel as telecoms provider
- To act in adherence to the Brazilian legislation and tax regime
- To adhere to the Brazilian numbering scheme (local MSISDN, local ICCID)

No permanent roaming

- Brazilian laws do not allow non-Brazilian IMSIs' roaming to extend beyond 90 days
- To provide full coverage across Brazil, multi-operator network access is required

Coverage is key

- Brazil is a large market with a high growth rate
- Price level – compared to US/EU – is high
- Multi-operator offering is required to serve the full Brazil footprint

1NCE Global Brazil Offering Launch

Localized Brazil coverage for all 1NCE entities

Solution: 1NCE is now a fully authorized MVNO on Claro, compliant with Brazilian government regulations

Value Proposition: Permanent service in all of Brazil – for all customers, even outside Brazil!

The 1NCE Differentiation

Full MVNO

Legally & Regulatory Compliant

Local Breakout

Sao Paulo, Brazil

Competitive Price

Starting at 13€$

Permanent Roaming

No 90 days limit

Multi IMSI

Multi-Operator SIM
Claro, Tim & Vivo

High Performance

Faster than Claro itself
(up to 20ms latency)

Competition

Anatel telecom licence required to operate

Authorized MVNOs are fully flexible by
using their own IMSI range
(1NCE, Arqia, KORE, emnify)

Accredited MVNOs are just resellers of the
MNO or authorized MVNO
(Eseye)

Hardly any international IoT connectivity
provider has a legally & regulatory
compliant and price-wise competitive
multi-operator offering for Brazil
(1NCE)

Introducing 2 new Multi-IMSI SIM materials to our portfolio

SIM Card Business Brazil

Plastic
3-in-1
No Freedom to Switch

SIM Chip Industrial Brazil

MFF2
With Freedom to Switch

Freedom to Switch (eUICC)
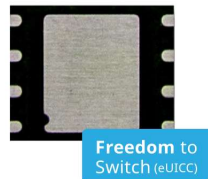
Both Brazilian flavours ship with multiple IMSIs:

Claro = primary profile (1NCE Brazil)
GSIM = fallback for TIM, Vivo

Claro   GSIM

New SIM portfolio will be available mid of April via Direct Sales only

3 High Data IoT

Why offer High Data IoT to customers?

Support customers in their growth journey

1NCE-ify existing high data offerings in the market

Extend into new market segment

Product Description

Pricing

5 €$ per GB
One global price

Invoicing

Quarterly

Example Calculation

Traffic Device A: 2.7 GB
Traffic Device B: 1.1GB
Traffic Total: 4 GB

Cost: 20 €$

(GBs rounded up)

Billing

Pay-as-you-Go
Unlimited Consumption

Throughput

Up to 25Mbit/s
If required by use case

Roadmap

1. US & EU by invitation
2. APAC & LATAM by invitation
3. Global Self-Service

Differentiators

Unlimited data, no overages,
no pre-commitment, great price

4 Customer Care: Our Support

1NCE provides dedicated Customer Care & Technical Support

All requests via contact form are forwarded to the 1NCE Team and will be answered by respective IoT experts (e.g. delegated to technical support).

A Pre-Sales Care

Not a customer yet?

You want to know more about 1NCE and our offerings?

Fill out our contact form and get in touch with the 1NCE Team.

CONTACT FORM

Already a 1NCE customer?

You already are a 1NCE customer and have questions about the 1NCE IoT Flat Rate?

Manage your SIM cards and directly contact our service team via our hotline or our ticket system

CUSTOMER PORTAL

1NCE Help Center

Easily find your answers and useful insight on how to use 1NCE products.

The 1NCE Help Center provides comprehensive information about 1NCE usage and support material such as videos and documentations.

HELP CENTER

Self Service: FAQs are curated permanently and will be subsequently added with new content. 1NCE Documentation incl. Starting Guide, Developer Hup and API Reference
➔ Comprehensive knowledge data-base for all kinds of product related information
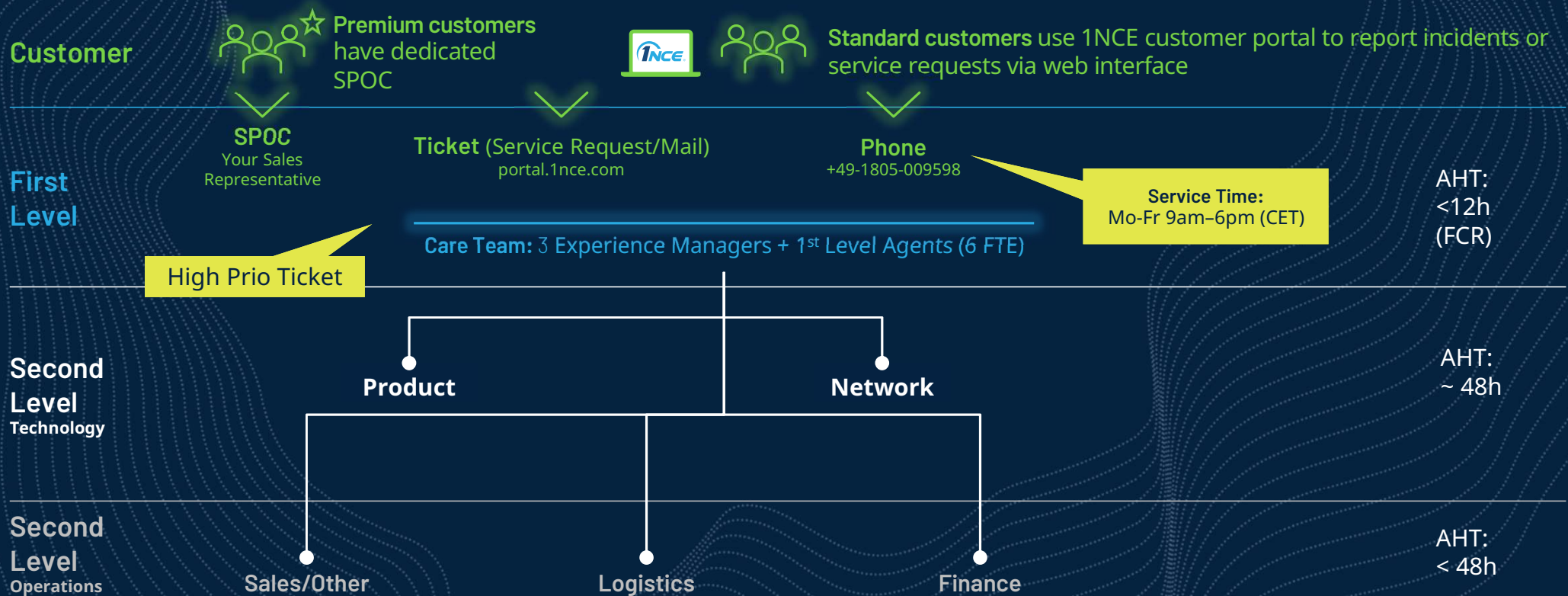
C Self-Services

B After-Sales Care

Customers can **raise tickets** or **dial the hotline.**
Both options can be found in the customer portal.

1NCE has internal commitments to solve standard requests within 48 hours

Customer

Premium customers have dedicated SPOC

Standard customers use 1NCE customer portal to report incidents or service requests via web interface

First Level

SPOC
Your Sales Representative

Ticket (Service Request/Mail)
portal.1nce.com

Phone
+49-1805-009598

Service Time:
Mo-Fr 9am–6pm (CET)

AHT:
<12h
(FCR)

Care Team: 3 Experience Managers + 1st Level Agents (6 FTE)

High Prio Ticket

Second Level Technology

Product

Network

AHT:
~ 48h

Second Level Operations

Sales/Other

Logistics

Finance

AHT:
< 48h

48   Notes: FCR = First Contact Resolution, AHT = Average Handling Times // No SLA defined

Our Customer Care team

30 AGENTS
1St Level Support

1St Level Support / Customer Care Agents are located across 3 continents in order to provide "Follow The Sun" Serviceability

8 FTE
Customer Care Operations Team

CC Operations team monitors quality of 1st and 2nd Level Support. Makes sure 1NCE is a global consistent service, checks for response and resolution times of tickets

20 FTE
2nd Level Support:

2nd Level Support Team manages operational task across Technical Teams, Logistics, Payment, Finance, Service Times, Sales and Marketing

14 WRITTEN
Languages

Supported languages include DE, EN, NL, ES, IT, FR, PL, PT, JA, GR, HU, RO, IC, LO, CZ and NO

8 SPOKEN
Languages (Hotline)

We support 8 spoken languages (hotline) for EMEA, US, are currently adding and training Japanese language support.

20x5
Service Time

We support 20x5 Service Times EMEA 8am – 8pm, USA: 8am – 4pm. For TISP extended to 20x6.

Available globally

1st Level Support
Center Germany
Locations: Berlin, Cologne, Münster

Operations
Center Latvia
Location: Riga

1st Level Operations
Center Japan
Location: Tokyo

1st Level Support
Center USA
Location: Miami

1st Level Operations
Center Malaysia
Location: Malaysia