



Report for the first quarter 2026

Highlights

- ✓ Revenues: +3.9% versus Q1 2025, driven by service revenue growth
- ✓ Service revenues: +3.2% as strong growth in international (+11.5%) offsets decline in Austria
- ✓ Core OPEX: Cost control mitigates cost increases related to ICT growth
- ✓ EBITDA: +4.6%, with strongest contributions from Bulgaria, Croatia and Belarus
- ✓ Net result: +14.7%, supported by higher EBIT and an improved financial result
- ✓ CAPEX: EUR 164 mn (PY: EUR 222 mn), decline due to CAPEX timing and lower CAPEX for spectrum
- ✓ Free cash flow: +53.5% mainly reflecting lower CAPEX and improved operating performance
- ✓ Spectrum: 2.6 GHz spectrum in Austria extended for EUR 11 mn
- ✓ Outlook confirmed: Total revenue growth of 2-3%, CAPEX ex. spectrum of around EUR 750 mn

In this report, rounding differences may occur in the summing of rounded amounts due to the use of automatic calculation tools.

'International' comprises the segments Bulgaria, Croatia, Belarus, Slovenia, Serbia, North Macedonia as well as A1 Digital.

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Key financial data

in EUR million	Q1 2026	Q1 2025	Δ
Total revenues	1,366	1,314	3.9%
Service revenues	1,143	1,108	3.2%
Equipment revenues	203	188	7.9%
Other operating income	20	19	9.2%
Wireless revenues	806	777	3.7%
Service revenues	633	615	2.9%
Equipment revenues	173	162	6.5%
Wireline revenues	540	519	4.1%
Service revenues	510	493	3.5%
Equipment revenues	30	26	16.9%
EBITDA ¹⁾	500	478	4.6%
EBITDA margin	36.6%	36.4%	0.2pp
EBITDAaL ²⁾	391	371	5.5%
EBITDAaL margin	28.7%	28.2%	0.4pp
Depreciation, amortization, impairments	302	294	2.7%
EBIT ³⁾	197	184	7.5%
EBIT margin	14.5%	14.0%	0.5pp
Net result	144	125	14.7%
Net margin	10.5%	9.5%	1.0pp
Capital expenditures	164	222	-26.3%
Free cash flow	235	153	53.5%

	Mar. 31, 2026	Mar. 31, 2025	Δ
Net debt / EBITDA (12 months)	0.8	0.9	-0.14x
Net debt (excl. leases) / EBITDAaL (12 months)	-0.1	0.0	-0.14x

Customer indicators (thousand)	Mar. 31, 2026	Mar. 31, 2025	Δ
Mobile subscribers	31,036	27,588	12.5%
Postpaid	27,556	24,022	14.7%
Prepaid	3,480	3,566	-2.4%
RGUs ⁴⁾	6,498	6,379	1.9%

	Q1 2026	Q1 2025	Δ
ARPU (in EUR) ⁵⁾	6.9	7.5	-8.0%
ARPL (in EUR) ⁶⁾	25.6	26.8	-4.4%
Mobile churn	0.9%	1.2%	-0.3pp

	Mar. 31, 2026	Mar. 31, 2025	Δ
Employees (full-time equivalent)	16,644	17,035	-2.3%

¹⁾ Earnings Before Interest, Tax, Depreciation and Amortization

²⁾ EBITDA after Leases: EBITDA - depreciation of lease assets according to IFRS 16 - interest expenses pursuant to IFRS 16

³⁾ Operating income according to IFRS

⁴⁾ Revenue Generating Unit

⁵⁾ Average Revenue Per User incl. M2M Subscriber

⁶⁾ Average Revenue Per Line

Q1 2026 in a nutshell

In Q1 2026, total revenues increased mainly driven by higher service revenues, supported by continued growth in the ICT business and a solid performance in the retail mobile business. Equipment revenues contributed positively to results as well.

Results were primarily driven by the continued strong performance in the CEE region, where all international markets contributed to service revenue growth. This was driven by successful upselling initiatives, an increasing number of fixed-line RGUs in the international markets, and strong growth in the solutions and connectivity business, particularly in Bulgaria. Value-protecting measures were implemented in line with 2025 inflation in Austria (+3.5%, as of April 2026) and Croatia (+3.7% as of March 2026).

In Austria, service revenues declined, resulting in lower total revenues though the decline was partly mitigated by higher equipment revenues.

In a year-on-year comparison, non-operating effects at Group level were broadly unchanged in Q1. There were no one-off effects recorded in Q1. Restructuring charges amounted to EUR 36 mn in both Q1 2026 and Q1 2025. FX effects were negligible with a slight positive FX impact due to the appreciation of the Belarusian Ruble versus the Euro.

Total OPEX increased due to higher cost of service and higher cost of equipment. Core OPEX also rose. However, disciplined cost control partially offset product-related cost increases, which were largely driven by licenses and software for resale. Total workforce costs remained stable, reflecting ongoing internal transformation measures. In addition, lower network maintenance costs had a positive effect. Compared to the previous year, the equipment margin improved.

EBITDA increased by 4.6%, with growth in all markets except Austria.

Free cash flow improved by 53.5% in Q1 2026 compared to the same period last year thanks to lower CAPEX and a better operational result.

In April 2026, A1 extended frequencies of 2x25 MHz in the 2.6 GHz FDD band in Austria, with a total investment of approximately EUR 11 mn for the reacquisition of the frequencies.

A1 Group's company SB Telecom established business operations in Dubai, UAE, serving as a sourcing hub for equipment and as a platform for wholesale telecommunications business expansion in the MENA region. This includes data services, voice solutions, roaming and related international connectivity services. This expansion is designed to capitalize on the region's favorable position for international wholesale trade and telecommunications activities.

Mobile subscribers and fixed-line RGUs

In mobile communications, the total number of subscribers increased by 12.5% year-on-year to around 31 million. As in previous quarters, growth was primarily driven by the continued strong expansion of the M2M business. Excluding M2M, the subscriber base increased by 1.8%. Postpaid subscriber growth was recorded across all markets.

In the fixed-line business, the number of revenue generating units (RGUs) increased by 1.9% year on year. While voice RGUs continued to decline, broadband and TV RGUs recorded further growth. Strong RGU growth in the international operations, particularly in Bulgaria and Belarus, more than offset the decline in Austria.

The Internet@home postpaid customer base increased by 6.0% year on year to 4.1 million across the Group. This development reflects both higher broadband RGUs and a rising number of mobile WiFi routers. Broadband RGUs increased in all markets except Austria and Slovenia, while mobile WiFi routers grew in all markets except Croatia and North Macedonia.

Outlook for the financial year 2026

The management board confirms the guidance for total revenue growth of 2–3% compared to the previous year. Capital expenditures excluding frequencies and M&A are expected to amount to around EUR 750 mn.

Group results for Q1 2026

Macroeconomic and Competitive Environment

Compared to the previous quarter, the Austrian economic environment continues to be characterised by subdued growth expectations and easing, albeit still elevated inflation. According to the Austrian National Bank (OeNB), economic growth in Austria is expected to amount to around 0.5% in 2026¹⁾, reflecting a modest recovery amid heightened geopolitical uncertainty and higher energy prices. Inflation has declined from the peaks observed in late 2025 but increased again in early 2026. The harmonised inflation rate stood at around 3.1%²⁾ year-on-year in March 2026, following 2.3%³⁾ in February 2026, reflecting renewed upward pressure from energy prices. In this challenging environment, A1 Group continues to navigate macroeconomic headwinds through a customer-centric approach, targeted strategic market investments and stringent cost control.

The telecommunications market in Austria remained highly competitive in the first quarter of 2026. In the mobile market, competitive intensity increased further in the low-value segment, where new providers entered the market with aggressive and competitive offerings. At the same time, the environment in the high-value segment improved slightly. Price increases for new mobile customers were implemented, alongside additional value-protecting measures as outlined above. We responded to ongoing competitive pressure with selective strategic market investments and a focused multi-brand strategy. Price sensitive segments were addressed through targeted initiatives under the brand "YESSS", while high-value customers were approached via the A1 brand through loyalty programs, household bundles and subsidies. The fixed-line market continued to be characterized by high promotional activity and sustained market investments across all players. To defend our position in the Internet@home market, we maintained promotional activity, continued to pursue a technology-agnostic approach and further advanced the fiber roll-out to support upselling. Differentiation was reinforced through additional value-added services such as entertainment and security solutions.

While international markets were also affected by ongoing geopolitical uncertainties, growth dynamics in the CEE region remain stronger than in Austria and the Eurozone in general, reflecting structurally higher growth rates. GDP growth expectations across the region stayed positive. Competitive intensity was broadly stable in the larger CEE markets, and demand for high-speed broadband, ICT solutions and value-added services remained solid.

In Q1 2026, the Belarusian Ruble appreciated against the Euro by 2.5%, with a period average exchange rate of 3.39 in Q1 2026 and 3.47 in Q1 2025.

Revenue development

Group revenues increased by 3.9% year on year in the first quarter of 2026. Revenue growth was recorded in all markets except Austria, with particularly strong contributions from Bulgaria, Belarus and Serbia. Equipment revenues increased compared to the prior year. Growth in retail service revenues in the CEE markets more than offset the decline in Austria, with both mobile and fixed retail service revenues increasing across all CEE countries.

Solutions and Connectivity revenues rose by 13% year-on-year, driven largely by ICT deals concluded in Bulgaria.

In **Austria**, total revenues declined by 2.9%. Higher equipment revenues were not sufficient to compensate for the decline in retail service revenues, which was particularly pronounced in the fixed-line segment. In the mobile business, as in previous quarters, lower incoming ARPU continued to weigh on service revenues, while the customer base was further expanded, with positive net adds both in the core mobile postpaid business and in mobile postpaid WiFi routers.

In the retail fixed-line business, trends remained largely unchanged compared to previous quarters, reflecting continued declines in voice and low-bandwidth customers as well as lower ARPL. At the same time, we continued to record customer growth in the high-bandwidth segment. Solutions and Connectivity revenues remained largely stable. Interconnection revenues declined compared to the previous year, mainly driven by lower network transit volumes. Value-protecting measures were implemented as of April 2026 in the amount of 3.5% based on the CPI for the financial year 2025. (April 2025: 2.9%, April 2024: 7.9%).

A1 Group's **international** operations delivered a strong financial performance, with total revenues increasing by 10.7% in Q1 2026. Service revenues rose by 11.5% year on year, with growth recorded across all business areas. Equipment revenues also

¹⁾ <https://www.oenb.at/en/Media/Press-Archives/2026/20260324.html>

²⁾ <https://www.statistik.at/en/statistics/national-economy-and-public-finance/prices-and-price-indices/consumer-price-index-cpi/-hicp>

³⁾ <https://tradingeconomics.com/austria/harmonised-inflation-rate-yoy>

increased over the same period. Service revenue growth in the international markets was supported by upselling initiatives, strong demand for high-speed broadband products and the continued expansion of ICT solutions.

OPEX and EBITDA

At **Group** level, total operating expenses increased in Q1 2026, primarily driven by higher cost of service while equipment costs also rose. The rise in Core OPEX was related to ICT deals and cost increases for licenses and software for resale. Total workforce costs remained stable. Restructuring charges amounted to EUR 36 mn in both Q1 2026 and Q1 2025. Overall, we continued our stringent cost control. Savings in network maintenance, commissions and advertising mitigated some of the above-mentioned cost increases.

In **Austria**, total OPEX declined in Q1 2026 year-on-year. Core OPEX decreased mainly due to lower total workforce costs supported by a lower number of FTEs. Besides that, costs and expenses declined for network maintenance, commissions and advertising. The equipment margin improved year-on-year.

Total OPEX in **international** markets was driven by higher cost of service. The increase in Core OPEX resulted mainly from the above-mentioned increases for licenses and software for resale. Total workforce costs as well as other product-related costs were also higher. In Belarus, the right-of-use contract for exclusive frequency blocks was cancelled by the Belarusian infrastructure provider beCloud. Starting 2026, the new contract between the provider beCloud and A1 Belarus is exclusively based on used capacities in the 4G network and will be recognized in operating expenses, thus weighing on the OPEX development in a year-on-year comparison.

In Q1, the equipment margin in international markets improved compared to the previous year.

Group EBITDA grew by 4.6% in Q1 2026. Bulgaria, Belarus and Croatia posted the highest contributions on the back of strong service revenue growth and cost control. In Q1, EBITDA grew in all markets except for Austria.

In **Austria, EBITDA** excluding restructuring declined by 1.9% in Q1 (-2.3% including restructuring). The lower core OPEX as a result of a strong focus on efficiency measures and the improved equipment margin could not compensate for the decline in service revenues.

In **international markets, EBITDA** increased by 9.6% thanks to service revenue increases in all CEE markets and a high focus on cost control.

Below EBITDA

Depreciation and amortization increased due to a different asset mix.

In Q1 2026, **EBIT** rose by 7.5%. The **financial result** improved due to higher interest income. Consequently, the **period result** rose by 14.7% in Q1 2026.

Capital Expenditures

A1 Group focused on expanding its fiber roll-out and 5G networks both in Austria and internationally. In Q1 2026, capital expenditures ('CAPEX') decreased by 26.3% year-on-year to EUR 164 mn. The decrease was mostly attributable to lower CAPEX in Austria. CAPEX for spectrum was also lower: In Bulgaria, spectrum investments in Q1 2025 amounted to a total of EUR 9.6 mn, while there was no spectrum acquisition in Q1 2026.

Free Cashflow

In the first quarter of 2026, free cash flow increased by 53.5% year-on-year. Besides the better operational result, the main driver was the lower CAPEX both due to lower investments and lower spectrum payments compared to the same period last year (EUR 10 mn in Q1 2025). Changes in working capital and other changes remained largely stable. Positive effects from accounts payable and lower inventories outweighed a less favourable development in accounts receivable. Overall, that more than offset the higher leases paid.

	Q1 2026	Q1 2025	Δ
EBITDA	500	478	4.6%
Restructuring charges and cost of labor obligations	36	37	-0.6%
Lease paid (principal, interest and prepayments)	-109	-104	n.m.
Income taxes paid	-19	-17	n.m.
Net interest paid	8	6	33.7%
Change working capital and other changes	-5	-9	n.m.
Capital expenditures	-164	-222	n.m.
Social plans new funded	-12	-15	n.m.
FCF after social plans new	235	153	53.5%

Balance sheet and net debt

As of March 31, 2026, the total assets amounted to EUR 10,415 mn, 1.8% higher than at December 31, 2025. This was primarily driven by higher cash and cash equivalents. Current liabilities increased mainly due to the increase in accounts payable. Total stockholders' equity rose by 2.7%.

In the first quarter 2026, the increase in cash and cash-equivalents lead to a decline in net debt. Additionally the long-term lease liabilities decreased. Both the 'net debt/EBITDA'-ratio as well as the 'net debt (excl. leases)/EBITDA after leases'-ratio improved.

in EUR million	Mar 31, 2026	Mar 31, 2025	Δ
Long-term debt	-	-	n.a.
Lease liability long-term	1,453	1,513	-4.0%
Short-term debt	755	754	0.2%
Lease liability short-term	358	342	4.7%
Cash and cash equivalents	-600	-362	n.m.
Investments marketable	-315	-318	n.m.
Net debt (incl. leases)	1,652	1,928	-14.3%
Net debt (incl. leases) / EBITDA	0.8	0.9	-0.14x
Net debt (excl. leasing)	-159	74	n.m.
Net debt excl leasing / EBITDAaL	-0.1	0.0	-0.14x

The definition of net debt was revised in 2025 and includes both short-term and long-term marketable financial investments.

Underlying performance Group

in EUR million	Q1 2026	Q1 2025	Δ
Total revenues	1,366	1,314	3.9%
Service revenues	1,143	1,108	3.2%
Equipment revenues	203	188	7.9%
Other operating income	20	19	9.2%
EBITDA	500	478	4.6%
One-off effects	-	-	n.a.
Restructuring	36	36	0.1%
EBITDA adjusted for one-off effects and restructuring	536	514	4.2%

One-off effects and restructuring: A positive value in the table means a negative impact and vice versa

Underlying performance Austria

in EUR million	Q1 2026	Q1 2025	Δ
Total revenues	657	676	-2.9%
Service revenues	578	603	-4.3%
Equipment revenues	66	60	8.7%
Other operating income	14	13	8.7%
EBITDA	222	228	-2.3%
One-off effects	-	-	n.a.
Restructuring	36	36	0.1%
EBITDA adjusted for restructuring and one-off effects	258	263	-1.9%

Underlying performance international

in EUR million	Q1 2026	Q1 2025	Δ
Total revenues	723	653	10.7%
Service revenues	577	517	11.5%
Equipment revenues	137	128	7.5%
Other operating income	8	8	10.5%
EBITDA	283	258	9.6%

Condensed Consolidated Statement of Comprehensive Income

in EUR million, except per share information	Q1 2026	Q1 2025	Δ
Service revenues	1,143	1,108	3.2%
Equipment revenues	203	188	7.9%
Other operating income	20	19	9.2%
Total revenues (incl. other operating income)	1,366	1,314	3.9%
Cost of service	-377	-354	n.m.
Cost of equipment	-204	-193	n.m.
Selling, general & administrative expenses	-284	-289	n.m.
Other expenses	-2	-1	n.m.
Total cost and expenses	-866	-837	n.m.
Earnings before interest, tax, depreciation and amortization (EBITDA)	500	478	4.6%
Depreciation and amortization	-212	-207	n.m.
Depreciation of right-of-use assets	-90	-88	n.m.
Impairment	0	0	n.a.
Reversal of Impairment	0	0	n.a.
Operating income (EBIT)	197	184	7.5%
Interest income	10	8	27.5%
Interest expense	-22	-25	n.m.
Interest on employee benefits and restructuring and other financial items, net	-2	-4	n.m.
Foreign currency exchange differences, net	-1	-0	n.m.
Equity interest in net income of associated companies	1	1	74.4%
Financial result	-15	-20	n.m.
Earnings before income tax (EBT)	183	163	11.9%
Income tax	-39	-38	n.m.
Net result	144	125	14.7%
thereof, attributable to the equity holders of the parent	144	125	14.7%
thereof, non-controlling interests	0	0	19.9%
Earnings per share attributable to equity holders of the parent in euro*	0.22	0.19	14.7%
Other comprehensive income items			
Effect of translation of foreign entities	2	21	-89.7%
Realized result on hedging activities, net of tax	0	0	n.a.
Unrealized result on debt instruments at fair value, net of tax	-1	0	n.m.
Items that may be reclassified to the net result	1	21	-93.9%
Remeasurement of defined benefit obligations, net of tax	-0	-1	n.m.
Items that will not be reclassified to the net result	-0	-1	n.m.
Total other comprehensive income (loss)	1	20	-94.4%
Total comprehensive income (loss)	145	146	-0.5%
thereof, attributable to the equity holders of the parent	145	146	-0.5%
thereof, non-controlling interests	0	0	19.9%

* Basic and diluted, weighted-average number of ordinary shares outstanding was constantly 664,084,841

Condensed Consolidated Statement of Financial Position

in EUR million	Mar 31, 2026	Mar 31, 2025	Δ
ASSETS			
Cash and cash equivalents	600	362	65.9%
Short-term investments	383	398	-3.8%
Accounts receivable: Subscribers, distributors and other, net	1,027	1,021	0.5%
Receivables due from related parties	32	11	178.1%
Inventories, net	143	119	19.7%
Income tax receivable	2	2	32.4%
Other current assets, net	300	276	8.6%
Contract assets	92	93	-1.3%
Current assets	2,578	2,283	12.9%
Property, plant and equipment, net	3,206	3,213	-0.2%
Right-of-use assets, net	1,755	1,820	-3.5%
Intangibles, net	1,468	1,509	-2.7%
Goodwill	1,092	1,092	0.0%
Investments in associated companies	4	3	28.3%
Long-term investments	215	215	-0.2%
Deferred income tax assets	64	62	2.3%
Other non-current assets, net	33	31	8.1%
Non-current assets	7,837	7,945	-1.4%
TOTAL ASSETS	10,415	10,228	1.8%
LIABILITIES			
Short-term debt	755	754	0.2%
Lease liabilities short-term	358	342	4.7%
Accounts payable	1,090	1,023	6.6%
Accrued liabilities and current provisions	257	274	-6.0%
Income tax payable	99	73	36.0%
Payables due to related parties	45	46	-1.9%
Contract liabilities	261	255	2.4%
Current liabilities	2,866	2,766	3.6%
Long-term debt	0	0	n.a.
Lease liabilities long-term	1,453	1,513	-4.0%
Deferred income tax liabilities	61	66	-7.7%
Other non-current liabilities	10	10	-0.2%
Asset retirement obligation and restructuring	371	366	1.6%
Employee benefits	156	155	0.5%
Non-current liabilities	2,050	2,109	-2.8%
STOCKHOLDERS' EQUITY			
Common stock	1,449	1,449	0.0%
Treasury shares	-8	-8	n.m.
Additional paid-in capital	1,100	1,100	0.0%
Retained earnings	3,696	3,552	4.0%
Other comprehensive income (loss) items	-742	-743	n.m.
Equity attributable to equity holders of the parent	5,496	5,351	2.7%
Non-controlling interests	3	3	4.6%
TOTAL STOCKHOLDERS' EQUITY	5,498	5,353	2.7%
TOTAL LIABILITIES AND STOCKHOLDERS' EQUITY	10,415	10,228	1.8%

Condensed Consolidated Statement of Cash Flows

in EUR million	Q1 2026	Q1 2025	Δ
Earnings before income tax	183	163	11.9%
Depreciation	141	137	2.7%
Amortization of intangible assets	71	69	2.4%
Depreciation of right-of-use assets	90	88	3.0%
Impairment/Reversal of impairment PPE	0	0	n.a.
Equity interest in net income of associated companies	-1	-1	n.m.
Result on sale/measurement of investments	-2	-0	n.m.
Result on sale of property, plant and equipment	0	1	-20.5%
Net period cost of labor obligations and restructuring	40	40	-1.2%
Foreign currency exchange differences, net	1	0	n.m.
Interest income	-10	-8	n.m.
Interest expense	23	25	-9.8%
Other adjustments	-0	-0	n.m.
Non-cash and other reconciliation items	353	351	0.6%
Accounts receivable: Subscribers, distributors and other, net	-6	14	n.m.
Prepaid expenses	-5	-4	n.m.
Due from related parties	1	1	7.4%
Inventories	-23	-42	n.m.
Other assets	-17	-1	n.m.
Contract assets	1	2	-40.2%
Accounts payable and accrued liabilities	63	-6	n.m.
Due to related parties	-1	-0	n.m.
Contract liabilities	6	19	-67.9%
Working capital changes	20	-17	n.m.
Employee benefits and restructuring paid	-31	-35	n.m.
Interest received	8	8	7.2%
Income taxes paid	-19	-17	n.m.
Net cash flow from operating activities	515	453	13.5%
Capital expenditures paid	-187	-209	n.m.
Proceeds from sale of plant, property and equipment	1	1	-36.5%
Purchase of investments	-111	-35	n.m.
Proceeds from sale of investments	127	33	286.6%
Acquisition of businesses, net of cash acquired	0	-4	n.a.
Investments in associated companies	0	0	n.a.
Net cash flow from investing activities	-170	-214	n.m.
Repayments of long-term debt	0	0	n.a.
Interest paid	-19	-22	n.m.
Repayments of short-term debt	-4	0	n.a.
Issuance of short-term debt	6	0	n.m.
Dividends paid	0	0	n.a.
Acquisition of non-controlling interests	0	0	n.a.
Deferred consideration paid for business combinations	0	0	n.a.
Lease principal paid	-90	-84	n.m.
Net cash flow from financing activities	-107	-105	n.m.
Adjustment to cash flows due to exchange rate fluctuations, net	1	4	-79.6%
Cash and cash equivalents beginning of period	362	367	-1.4%
Net change in cash and cash equivalents	238	138	73.2%
Cash and cash equivalents end of period	600	505	18.9%

Financial calendar

June 14, 2026	Record date: Annual General Meeting
June 24, 2026	Annual General Meeting
June 26, 2026	Dividend ex-date
June 29, 2026	Dividend record date
July 1, 2026	Dividend payment date
July 21, 2026	Results Q2 / H1 2026
Oct 20, 2026	Results Q3 / Q1-Q3 2026

Risks and uncertainties

A1 Group faces various risks and uncertainties that could affect its results. For further details about these risks and uncertainties, please refer to the latest A1 Group Annual Financial Report.

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