

VIVACOM

**Certain historical consolidated financial
information and operating data**

June 2016

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Income statement

(BGN in millions)	For the three months ended				For the three months ended				For the three months ended				Year To Date		
	Mar-14	Jun-14	Sep-14	Dec-14	Mar-15	Jun-15	Sep-15	Dec-15	Mar-16	Jun-16	Sep-16	Dec-16	2014	2015	2016
Revenues	194.4	198.3	208.0	205.3	201.3	203.5	220.0	223.1	211.7	217.9	-	-	805.9	847.9	429.6
Fixed	92.5	92.5	89.3	87.5	87.8	86.4	84.7	82.2	82.6	82.2	-	-	361.9	341.1	164.8
Fixed-voice	50.8	48.8	46.2	44.6	42.8	40.5	39.0	37.0	35.7	34.3			190.3	159.3	69.9
Fixed-data	24.0	23.9	23.8	23.8	23.9	24.0	23.3	22.3	22.8	23.4			95.5	93.5	46.2
Fixed pay-TV	9.2	9.7	10.3	11.3	12.0	12.7	13.1	13.8	14.4	14.6			40.4	51.6	29.0
Fixed, other	8.6	10.1	9.0	7.9	9.1	9.1	9.4	9.1	9.7	9.9			35.7	36.8	19.6
Mobile	101.8	105.8	118.7	117.7	113.5	117.2	124.5	128.1	120.0	125.9	-	-	444.0	483.3	246.0
Mobile service	83.9	89.9	94.2	94.9	95.5	99.7	103.8	102.0	100.6	102.2	-	-	362.9	400.9	202.8
Pre-paid	4.8	5.4	6.7	5.3	4.7	5.2	6.4	4.8	4.1	4.6			22.1	21.1	8.7
Post-paid	79.1	84.5	87.5	89.6	90.8	94.5	97.4	97.1	96.5	97.6			340.8	379.8	194.1
Mobile, other	17.9	15.9	24.5	22.8	18.0	17.5	20.8	26.2	19.5	23.7			81.1	82.4	43.2
NURTS							13.7	14.5	11.0	11.6			-	28.2	22.6
Eliminations							(3.0)	(1.7)	(1.9)	(1.9)			-	(4.7)	(3.7)
Operating Expenses	(110.3)	(113.0)	(143.9)	(128.8)	(121.0)	(151.3)	(149.2)	(164.2)	(132.8)	(145.0)	-	-	(496.0)	(585.6)	(277.8)
Interconnect expense	(9.1)	(9.9)	(10.1)	(10.0)	(10.3)	(11.0)	(12.5)	(12.4)	(13.2)	(14.6)			(39.0)	(46.2)	(27.7)
Other operating expenses	(44.5)	(46.1)	(68.6)	(46.3)	(44.6)	(77.0)	(68.9)	(68.3)	(49.5)	(56.3)			(205.5)	(258.9)	(105.8)
Materials and consumables	(30.3)	(29.6)	(39.3)	(41.7)	(36.0)	(34.2)	(39.0)	(49.6)	(38.2)	(41.9)			(140.9)	(158.9)	(80.0)
Staff costs	(26.4)	(27.4)	(26.0)	(30.8)	(30.1)	(29.0)	(28.8)	(33.8)	(32.0)	(32.2)			(110.6)	(121.7)	(64.2)
Depreciation and amortization	(63.7)	(64.1)	(63.8)	(64.2)	(57.9)	(58.6)	(61.3)	(45.7)	(64.8)	(62.6)			(255.8)	(223.4)	(127.3)
Finance expenses, net	(12.7)	(10.2)	(7.3)	(4.5)	(11.0)	(11.5)	3.6	(12.8)	(12.9)	(13.0)			(34.7)	(31.7)	(25.9)
Other Gains and Loses, net	1.3	1.3	3.0	4.0	3.9	2.7	9.6	2.3	1.7	0.6			9.6	18.5	2.3
Profit before tax	9.0	12.2	(4.0)	11.8	15.2	(15.1)	22.7	2.8	2.9	(2.0)	-	-	29.1	25.6	0.9
Income tax expense	(1.1)	(1.1)	0.9	(1.5)	(1.6)	(5.3)	(3.4)	1.2	(0.3)	0.2			(2.7)	(9.1)	(0.1)
Profit for the period	8.0	11.1	(3.1)	10.3	13.6	(20.4)	19.3	4.0	2.7	(1.8)	-	-	26.3	16.5	0.8
Adjustments for:															
Income tax expense	1.1	1.1	(0.9)	1.5	1.6	5.3	3.4	(1.2)	0.3	(0.2)	-	-	2.7	9.1	0.1
Finance expenses, net	12.7	10.2	7.3	4.5	11.0	11.5	(3.6)	12.8	12.9	13.0	-	-	34.7	31.7	25.9
Depreciation and amortization	63.7	64.1	63.8	64.2	57.9	58.6	61.3	45.7	64.8	62.6	-	-	255.8	223.4	127.3
EBITDA	85.4	86.6	67.1	80.5	84.1	55.0	80.4	61.2	80.6	73.5	-	-	319.6	280.8	154.1
Other gains, net	(1.3)	(1.3)	(3.0)	(4.0)	(3.9)	(2.7)	(9.6)	(2.3)	(1.7)	(0.6)	-	-	(9.6)	(18.5)	(2.3)
Adjustments to operating expenses	1.7	2.6	26.2	(5.5)	2.8	32.8	19.2	14.6	1.2	4.2	-	-	25.0	69.4	5.4
Asset impairment and write off	0.6	1.0	25.7	(7.9)	1.3	27.7	19.0	12.7	1.0	2.5			19.5	60.7	3.5
Provisions and penalties	0.5	1.0	0.1	0.7	(0.1)	4.1	(0.0)	0.6	(0.0)	1.4			2.4	4.7	1.4
Other exceptional items	0.5	0.6	0.3	1.7	1.6	1.0	0.1	1.3	0.2	0.2			3.1	4.0	0.4
Adjusted EBITDA	85.7	87.8	90.3	71.0	83.1	85.1	90.0	73.6	80.1	77.1	-	-	334.9	331.7	157.2
<i>incl. Vivacom</i>	85.7	87.8	90.3	71.0	83.1	85.1	85.5	69.9	75.9	72.6			334.9	323.6	148.5
<i>incl. NURTS</i>							1.7	3.6	4.4	4.5			-	5.3	9.0
<i>incl. Eliminations</i>							2.8	0.1	(0.2)	(0.1)			-	2.8	(0.3)

Balance sheet

(BGN in millions)	As at the month ended				As at the month ended				As at the month ended			
	Mar-14	Jun-14	Sep-14	Dec-14	Mar-15	Jun-15	Sep-15	Dec-15	Mar-16	Jun-16	Sep-16	Dec-16
Cash and Cash Equivalents	117.9	41.1	42.8	60.1	60.2	59.0	104.3	89.6	101.9	84.6		
Trade receivables	75.6	223.4	101.3	150.0	114.8	158.7	129.0	118.5	106.3	124.1		
Current income tax receivables	-	-	-	0.1	0.1	0.1	1.0	1.0	1.0	0.6		
Inventories	41.8	44.4	35.2	34.7	32.5	36.1	33.7	37.1	45.8	44.9		
Investments	0.8	0.0	9.2	0.3	1.7	0.8	0.4	0.1	-	0.1		
Other current assets	20.9	16.9	13.2	9.5	21.8	18.0	15.8	11.2	23.2	20.0		
Assets classified as held for sale	1.5	1.5	1.5	1.9	0.4	0.4	0.4	2.6	0.4	0.2		
Total current assets	258.5	327.3	203.1	256.4	231.5	273.1	284.8	260.0	278.5	274.4	-	-
Goodwill	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0		
Property, Plant and Equipment	826.9	802.1	785.8	812.3	787.7	773.3	821.4	823.7	798.9	794.0		
Intangible Assets	240.5	227.3	215.5	215.4	203.0	193.4	191.8	198.8	190.6	209.7		
Investments	45.7	6.2	19.1	0.4	0.4	0.4	0.4	0.4	0.4	0.4		
Trade receivables - non-current	11.0	11.1	104.0	84.4	125.4	76.3	47.1	48.5	50.0	49.1		
Other non-current assets	1.7	1.7	1.8	2.0	2.3	2.2	2.1	2.4	2.5	2.4		
Deferred tax assets	0.0	0.0	0.1	0.0	0.0	0.0	5.6	9.5	9.4	9.3		
Total non-current assets, net	1 127.7	1 050.5	1 128.1	1 116.5	1 120.9	1 047.7	1 070.3	1 085.4	1 053.9	1 066.9	-	-
TOTAL ASSETS	1 386.2	1 377.8	1 331.2	1 373.0	1 352.4	1 320.8	1 355.1	1 345.4	1 332.5	1 341.3	-	-
Dividends Payable	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Trade payables	74.2	61.2	69.5	121.2	73.8	84.3	82.6	90.1	68.6	103.0		
Other payables	34.6	42.4	33.5	31.5	39.0	33.3	37.4	36.4	40.3	30.5		
Deferred income/revenue	19.1	19.6	20.1	20.3	20.6	21.0	21.1	21.0	20.7	21.1		
Current income tax liabilities	2.0	2.9	4.5	0.0	2.6	3.6	6.2	0.4	2.3	2.3		
Provisions for other liabilities and charges	8.8	7.2	5.8	5.5	4.6	4.0	2.9	3.5	3.3	3.0		
Borrowings	23.5	11.8	24.9	12.5	25.3	12.3	25.1	20.2	23.3	10.4		
Total current liabilities	162.2	145.2	158.3	191.1	165.8	158.5	175.3	171.5	158.5	170.3	-	-
Borrowings	841.6	841.6	792.7	792.5	782.7	783.4	783.5	774.0	773.8	774.0		
Deferred Tax Liability, Net	17.8	17.9	15.4	15.1	14.3	10.6	8.5	7.7	5.5	3.8		
Retirement benefit obligations	2.0	2.1	2.1	3.1	3.2	3.3	3.8	5.2	5.4	5.4		
Provisions for other liabilities and charges	8.8	8.9	9.1	8.7	8.8	8.9	9.1	10.0	10.1	10.2		
Trade payables	4.0	3.9	3.8	3.7	3.7	3.6	3.5	3.4	3.3	3.2		
Deferred income/revenue	1.4	1.3	1.3	1.3	1.5	1.5	1.4	1.5	1.5	1.5		
Total non-current liabilities	875.5	875.7	824.5	824.4	814.2	811.3	809.8	801.9	799.5	798.1	-	-
Share Capital	288.8	288.8	288.8	288.8	288.8	288.8	288.8	288.8	288.8	288.8		
Reserves	45.0	42.4	37.0	36.2	37.0	36.1	35.7	35.0	34.6	34.9		
Retained earnings/(Accumulated loss)	14.7	25.8	22.8	32.5	46.6	26.2	45.5	48.4	51.0	49.2		
Total equity	348.5	357.0	348.5	357.5	372.4	351.1	370.0	372.1	374.4	372.9	-	-
TOTAL LIABILITIES AND EQUITY	1 386.2	1 377.8	1 331.2	1 373.0	1 352.4	1 320.8	1 355.1	1 345.4	1 332.5	1 341.3	-	-

Cash flow

	For the three months ended				For the three months ended				For the three months ended				Year To Date		
	Mar-14	Jun-14	Sep-14	Dec-14	Mar-15	Jun-15	Sep-15	Dec-15	Mar-16	Jun-16	Sep-16	Dec-16	2014	2015	2016
(BGN in millions)															
Operating Activities:															
Profit before tax from continuing activities	9.0	12.2	(4.0)	11.8	15.2	(15.1)	22.7	2.8	2.9	(2.0)			29.1	25.6	0.9
Adjustments for:															
Depreciation and amortization	63.7	64.1	63.8	64.2	57.9	58.6	61.3	45.7	64.8	62.6			255.8	223.4	127.3
Gain on sale of non-current assets	(1.3)	(1.3)	(3.0)	(4.0)	(3.9)	(2.7)	(1.8)	(1.4)	(1.7)	(0.6)			(9.6)	(9.8)	(2.3)
Impairment loss and write off of non-current asset	0.5	0.9	0.9	(8.3)	1.1	2.3	2.3	3.4	1.0	2.3			(6.0)	9.0	3.4
Interest expense, net	12.6	12.6	13.1	11.3	10.8	11.5	13.8	12.7	12.7	12.7			49.7	48.8	25.4
Impairment loss on trade receivables	2.2	2.1	24.1	2.7	2.1	27.0	20.5	11.7	2.9	3.9			31.0	61.2	6.8
Impairment loss and write off of current asset	0.4	0.1	0.2	1.2	0.1	0.2	0.1	2.1	(0.0)	1.0			1.9	2.5	1.0
Income from investment operations	-	(2.6)	(6.0)	(7.2)	-	(0.1)	(17.7)	(0.1)	-	-			(15.7)	(17.8)	-
Loss/(gain) from operations with cash flow hedges	(0.0)	0.0	0.0	0.0	(0.0)	(0.0)	0.0	(0.0)	(0.0)	(0.0)			0.0	(0.0)	(0.0)
Loss/(gain) from bargain purchase	-	-	-	-	-	-	(7.8)	(1.0)	-	-			-	(8.8)	-
Loss/(gain) from provisions	1.3	1.7	(1.4)	1.4	2.2	1.1	(1.3)	1.5	1.8	1.6			3.1	3.6	3.3
Changes in:															
- inventories	(4.9)	(2.6)	9.1	(0.7)	2.2	(3.8)	4.7	(4.5)	(8.6)	0.0			0.9	(1.4)	(8.6)
- trade and other receivables	(7.1)	(151.1)	5.3	4.4	(6.8)	(16.7)	(9.0)	(2.8)	9.4	(19.6)			(148.4)	(35.4)	(10.1)
- other current and non-current assets	(10.0)	4.0	3.7	3.3	(12.3)	1.8	2.8	3.3	(13.0)	2.6			1.1	(4.3)	(10.4)
- trade and other payables	5.2	(4.7)	(3.3)	15.3	(2.9)	(3.0)	1.7	(2.7)	(4.7)	(7.5)			12.5	(6.8)	(12.2)
- provisions and employee benefits	(1.7)	(3.2)	(1.1)	(1.3)	(2.5)	(1.5)	(1.3)	(0.5)	(0.9)	(1.3)			(7.3)	(5.7)	(2.3)
- deferred income/revenue	0.2	0.5	0.4	0.2	0.5	0.4	0.0	(0.0)	(0.3)	0.4			1.3	0.9	0.1
Cash generated from operations	70.1	(67.3)	101.9	94.4	63.8	60.0	91.0	70.2	66.1	56.1	-	-	199.2	285.0	122.2
Interest received	1.0	1.3	1.2	0.2	0.0	(0.0)	0.0	0.0	0.0	0.1			3.8	0.1	0.1
Interest paid	(1.0)	(25.6)	(0.6)	(26.3)	(0.3)	(26.1)	(0.2)	(26.3)	(0.2)	(26.1)			(53.5)	(52.8)	(26.3)
Income tax paid	(0.0)	(0.1)	(0.0)	(6.2)	(0.0)	(7.9)	(0.8)	(8.2)	(0.4)	(1.1)			(6.3)	(17.0)	(1.5)
Net cash from operating activities	70.1	(91.6)	102.5	62.1	63.5	26.0	90.1	35.7	65.6	29.0	-	-	143.1	215.3	94.5
Cash flows from investing activities:															
Proceeds from sales of property, plant and equipment	1.8	1.7	2.5	4.2	5.1	3.2	2.4	1.8	4.1	1.5			10.1	12.5	5.6
Acquisition of property, plant, equipment and intangible assets	(40.0)	(26.9)	(31.1)	(46.8)	(57.7)	(29.2)	(47.4)	(50.4)	(46.3)	(47.0)			(144.8)	(184.7)	(93.3)
Acquisition of investments	0.0	0.0	(28.1)	(0.2)	-	-	1.1	-	-	-			(28.3)	1.1	-
Cash deposits with maturity greater than three months	(0.1)	(0.0)	(0.3)	0.0	(0.2)	(0.2)	0.1	(0.2)	(0.0)	(0.0)			(0.4)	(0.6)	(0.1)
Dividends received	-	0.1	-	0.2	-	-	-	-	0.1	-			0.3	-	0.1
Sale of investments	-	40.5	6.0	-	-	-	-	-	-	-			46.4	-	-
Net cash (used in) investing activities	(38.3)	15.4	(51.1)	(42.6)	(52.8)	(26.2)	(43.7)	(48.9)	(42.2)	(45.5)	-	-	(116.7)	(171.6)	(87.7)
Cash flows from financing activities:															
Proceeds from new borrowings	-	78.2	9.8	9.8	9.8	9.8	9.8	9.8	-	-			97.8	39.1	-
Repayment of borrowings	-	(78.2)	(58.7)	(9.8)	(19.6)	(9.8)	(9.8)	(9.8)	(9.8)	-			(146.7)	(48.9)	(9.8)
Dividends paid	-	-	-	-	-	-	-	-	-	-			-	-	-
Payment of finance lease liabilities	(1.2)	(0.6)	(0.8)	(2.3)	(0.9)	(1.0)	(1.0)	(2.4)	(1.1)	(0.8)			(4.9)	(5.4)	(1.9)
Net cash used in financing activities	(1.2)	(0.6)	(49.7)	(2.3)	(10.7)	(1.0)	(1.0)	(2.4)	(10.9)	(0.8)	-	-	(53.8)	(15.2)	(11.7)
Net increase/(decrease) in cash	30.5	(76.8)	1.6	17.2	(0)	(1)	45	(16)	13	(17)	-	-	(27.4)	28.5	(4.8)
Effect of exchange rate fluctuations on cash held	(0.0)	0.0	0.1	0.0	0.1	(0.0)	(0.0)	0.9	(0.2)	0.0			0.1	0.9	(0.2)
Cash and cash equivalents at beginning of period	87.3	117.9	41.1	42.8	60.1	60.2	59.0	104.3	89.6	101.9	84.6	84.6	87.3	60.1	89.6
Cash and cash equivalents at end of period	117.9	41.1	42.8	60.1	60.2	59.0	104.3	89.6	101.9	84.6	84.6	84.6	60.1	89.6	84.6
<i>incl. NURTS</i>							1.7	3.8	1.8	3.3					
KPIs															
Change in net working capital	(18.2)	(157.1)	14.2	21.2	(21.7)	(22.7)	(1.1)	(7.2)	(18.2)	(25.4)	-	-	(140.0)	(52.7)	(43.6)
Other CF items	(11.3)	43.7	(18.5)	42.4	(29.1)	8.1	5.1	13.9	(5.8)	37.8	-	-	56.3	(2.1)	32.0
Pre-tax FCF	31.9	(51.9)	51.1	51.8	11.2	34.1	47.2	21.5	24.0	10.6	-	-	82.9	114.0	34.6

Capex

(BGN in millions)	For the three months ended				For the three months ended				For the three months ended				Year To Date		
	Mar-14	Jun-14	Sep-14	Dec-14	Mar-15	Jun-15	Sep-15	Dec-15	Mar-16	Jun-16	Sep-16	Dec-16	2014	2015	2016
Network	13.2	15.3	22.5	56.2	10.8	25.4	34.0	43.4	22.9	57.4			107.1	113.5	80.3
IT	2.8	2.5	2.0	5.9	2.5	3.0	1.4	5.1	1.0	1.9			13.3	12.1	2.9
Commercial and other	8.4	8.6	10.4	20.6	7.7	8.1	7.0	10.3	8.1	7.3			48.0	33.0	15.5
<i>incl. CPE</i>	4.9	4.2	5.9	6.0	3.9	3.6	2.6	3.9	3.7	2.8			21.0	14.0	6.5
Licenses	-	-	-	-	-	-	4.4	-	-	12.1			-	4.4	12.1
Total capital expenditure	24.4	26.3	34.9	82.7	21.0	36.4	46.7	58.7	32.1	78.7	-	-	168.4	162.9	110.8
<i>% of Revenue, excl. licenses</i>	12.5%	13.3%	16.8%	40.3%	10.4%	17.9%	20.2%	27.9%	15.8%	32.0%	-	-	20.9%	19.2%	24.0%
NURTS									0.0	0.2			-	-	0.2
<i>% of Revenue</i>	-	-	-	-	-	-	-	-	0.4%	1.5%	-	-	-	-	0.9%
Total Consolidated Capex	24.4	26.3	34.9	82.7	21.0	36.4	46.7	58.7	32.1	78.9	-	-	168.4	162.9	111.0
<i>% of Revenue consolidated, excl. licenses</i>	12.5%	13.3%	16.8%	40.3%	10.4%	17.9%	19.2%	26.3%	15.2%	30.6%	-	-	20.9%	18.7%	23.0%

Net debt

(BGN in millions)	As at the month ended				As at the month ended				As at the month ended			
	Mar-14	Jun-14	Sep-14	Dec-14	Mar-15	Jun-15	Sep-15	Dec-15	Mar-16	Jun-16	Sep-16	Dec-16
Syndicated loan	-	-	-	-	-	-	-	-	-	-	-	-
Bonds	782.8	771.7	785.5	773.4	787.2	775.1	789.0	777.0	790.9	778.9	-	-
Revolving credit	68.5	68.5	19.6	19.6	9.8	9.8	9.8	9.8	-	-	-	-
Trade credits	10.8	10.2	9.5	10.5	9.6	8.6	7.6	6.6	5.9	5.1	-	-
Financial lease	3.0	3.0	3.1	1.5	1.5	2.2	2.3	0.7	0.4	0.4	-	-
Total borrowings	865.0	853.4	817.6	805.0	808.0	795.7	808.7	794.1	797.1	784.4	-	-
Total cash and cash equivalents	(117.9)	(41.1)	(42.8)	(60.1)	(60.2)	(59.0)	(104.3)	(89.6)	(101.9)	(84.6)	(84.6)	(84.6)
Net debt	747.2	812.3	774.8	744.9	747.8	736.7	704.4	704.6	695.3	699.8	(84.6)	(84.6)

KPIs

	For the three months ended				For the three months ended				For the three months ended				For the year ended		
	Mar-14	Jun-14	Sep-14	Dec-14	Mar-15	Jun-15	Sep-15	Dec-15	Mar-16	Jun-16	Sep-16	Dec-16	2014	2015	2016
Fixed voice															
Subscribers at period end (in thousands)	1 290	1 256	1 227	1 195	1 162	1 124	1 088	1 051	1 017	987			1 195	1 051	987
ARPU (BGN)	12.3	12.1	11.9	11.8	11.6	11.5	11.4	11.2	11.1	10.9			12.0	11.4	11.0
AMOU (minutes)	113	106	99	109	112	102	96	105	108	98			107	104	103
Fixed broadband															
Subscribers at period end (in thousands)	329	335	346	356	362	370	377	390	400	411			356	390	411
% FTTx at period end	25	28	32	35	38	40	42	44	46	48			35	44	48
ARPU (BGN)	11.5	11.3	11.0	10.9	10.8	10.8	10.6	10.4	10.2	10.1			11.2	10.7	10.2
FTTx homes passed (in thousands)	737	780	831	883	902	964	1 005	1 034	1 047	1 062			883	1 034	1 062
Fixed pay-TV															
Subscribers at period end (in thousands)	268	277	298	322	333	337	352	369	379	390			322	369	390
% IPTV at period end	27	28	30	32	34	35	36	38	39	40			32	38	40
ARPU (BGN)	11.7	11.9	12.0	12.1	12.2	12.6	12.7	12.8	12.9	12.6			11.9	12.6	12.8
Mobile															
Subscribers at period end (in thousands)	2 594	2 677	2 809	2 853	2 896	2 957	3 020	3 024	3 011	3 063			2 853	3 024	3 063
% post paid at period end	85	85	84	85	85	85	85	87	87	86			85	87	86
Blended ARPU (BGN)	10.9	11.4	11.4	11.2	11.1	11.4	11.5	11.3	11.1	11.2			11.2	11.4	11.2
Post-paid ARPU (BGN)	12.1	12.6	12.7	12.5	12.4	12.7	12.8	12.5	12.3	12.3			12.5	12.6	12.3
Pre-paid ARPU (BGN)	3.9	4.5	5.1	4.0	3.7	4.0	4.6	3.8	3.5	3.9			4.4	4.1	3.7
% Mobile data revenue*	21	21	23	23	26	26	27	28	31	31			22	27	31
AMOU (minutes)	136	143	143	143	146	156	159	164	169	179			141	156	174

* % Mobile data revenue represents revenue from messaging and data vs. mobile service revenue