

IPKO – Spectrum and Success

Andras Pali - CEO

Connecting Kosovo. Empowering the Future.

- Leading telecom provider in Kosovo since 1999
- Offering mobile, ISP, TV and fixed telephony services and ICT solutions
- Trusted by over 1 million customers
- First to introduce 4G & 5G in the market

Pioneers in digital transformation and innovation in the region
Strong commitment to community impact and tech education

IPKO MBB Story

1999

Internet Project Kosovo was founded, the first Fixed and broadband service provider in Kosovo. First internet connection from Kosovo through (www.cnn.com)



2001

Internet Project Kosovo became IPKO, the transition from the non-governmental organization ipko.org to the company IPKO Net.

2007

It marks the launch of mobile telephony with a concert by the world famous rap artist 50 Cent. The first international call is made from IPKO's GSM network.

16 years after 2G launch worldwide



2013

IPKO brings 3G and 4G, the fastest mobile internet, for the first time in Kosovo.

12 years delay for 3G
4 years delay for 4G

IPKO MBB Story

2019

The implementation of the new country code +383 enhances Kosovo's phone number standardization and international communication.



2022

IPKO started **5G tests** to evaluate faster internet speeds, lower latency, and improved connectivity, paving the way for future 5G services in Kosovo.

3 years after South Korea

2023

IPKO launched e-SIM and 5G, offering faster speeds and improved connectivity.



2023

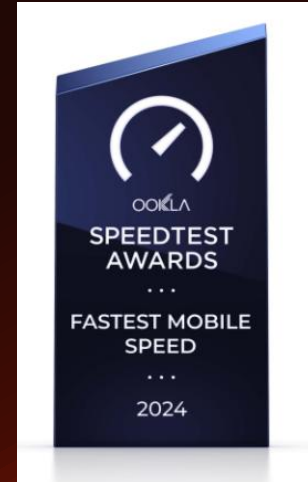
IPKO made a groundbreaking move by becoming the first telecom operator in the region to organize a **Cyber Security Conference**, setting a new benchmark for digital resilience

2024

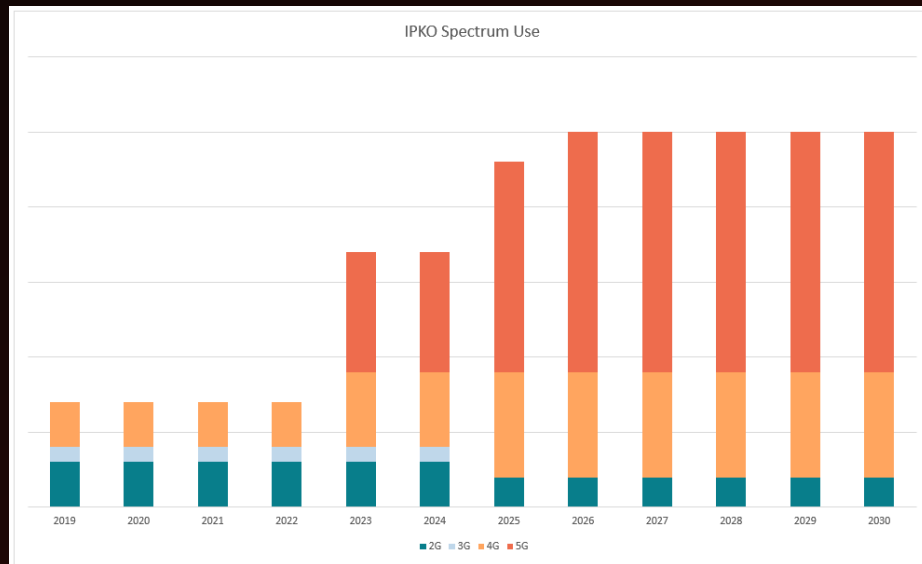
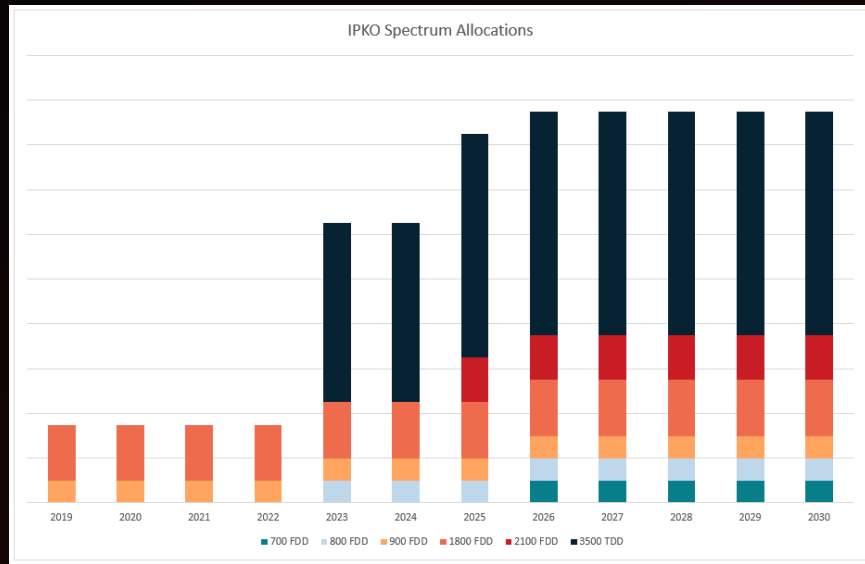
- 95.5 m EUR Revenues
- 23.9 m EUR Net profit
- Q2 - Complete RAN modernization (3 years project)
- Q3 - Q4 Fastest Mobile Network (Ookla)

2025

- Q1 Launch of Cyber Security Operation Center
- 3G Sunset
- VoLTE
- MNP
- 2100 Spectrum deployment for 5G suburban - rural



IPKO Spectrum Evolution



- 800/3500 Spectrum allocation was driving 5G investment for both IPKO & Vala
- Only the allocated spectrum is a good spectrum
- 5G Penetration 72% population (IPKO) by end of 2025

IPKO Radio Evolution

2020-2023

Spectrum bottlenecks

Limited investment

Slow MBB uptake

Business Case re-evaluation

2023-2025

5G Auction 800/3500

Both operators invest heavily

Significant user benefits

WB Roaming

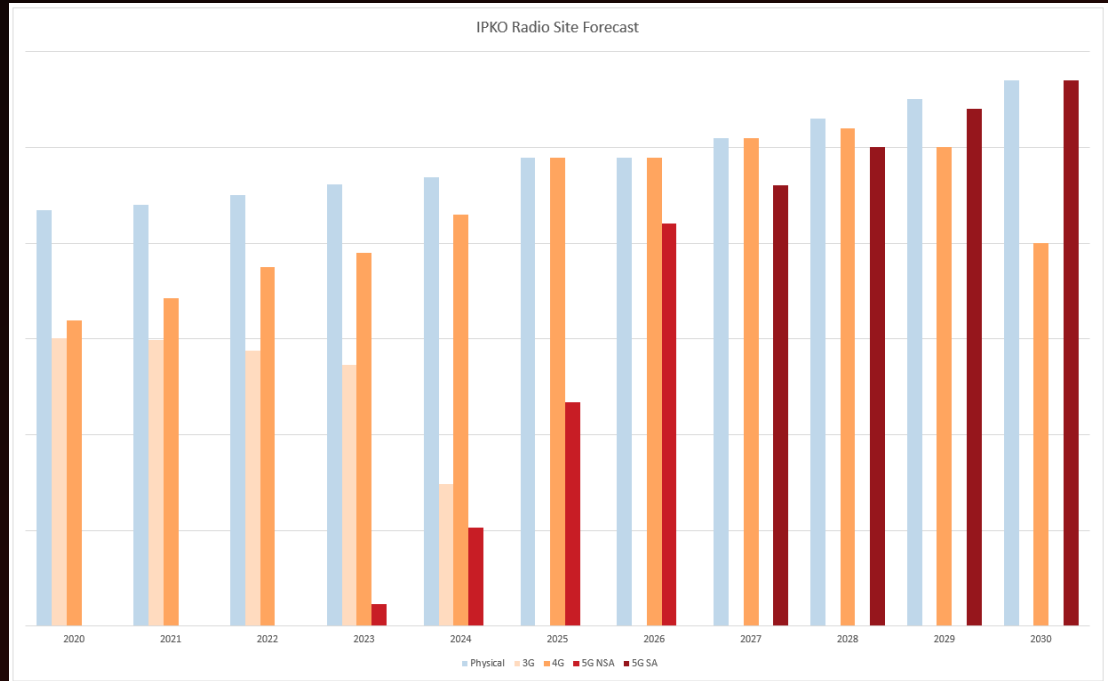
3G Sunset

2026-

Blurring the line - MBB FWA vs. ISP

4G/5G sites only

SA, 700, 6GHz?

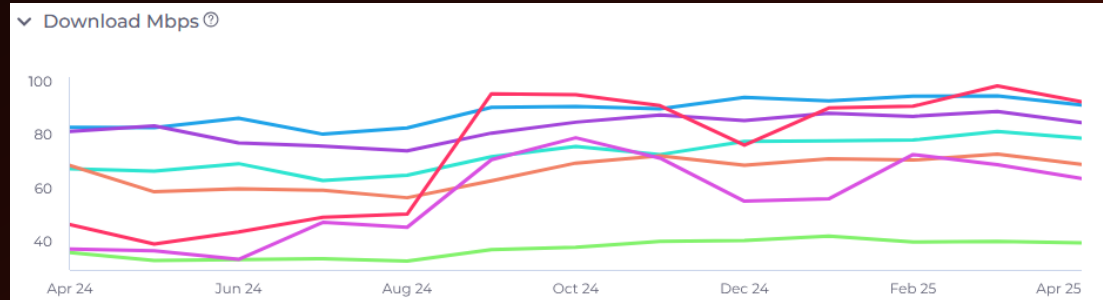


Business & Consumer View

- Kosovo have seen significant 5G investments
- User throughput 98% increase YoY for DL
- New business opportunities with FWA
- MBB is finally competitive in Kosovo with ISP
- End of PAYG offerings – GB bundles...

Country	2024 Q4				
	Mobile				
	Rank	DL mbps	Imp.	UL mbps	Imp.
WB Country 1	17	110.9	34%	26.7	11%
WB Country 2	42	78.1	45%	18.2	7%
Kosovo	43	75.4	98%	19.8	10%
WB Country 4	49	62.2	30%	14.0	17%
WB Country 5	51	58.9	11%	15.5	11%
WB Country 6	91	24.4	6%	10.2	-8%

- With 5G arrived e-SIM, VoLTE, MNP
- Soon SA & better terminal economy and power efficiency / coverage
- 2026 5G core trials and slicing for private networks



What we recommend

- Early adoption of 5G and allocation of all bands together Low, Mid and capacity for better economy
 - Re-evaluation of sleeping spectrum holdings vs. allocated spectrum
 - Good alignment between regulatory and business - Kosovo is good example for this
 - Be vigilant with new spectrum (6G, 26G) and work with industry for early allocation for maximized benefits for users
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- MBB is a very good solution for WB countries as it can be easily deployed
 - Competitive with majority of FBB services and with more spectrum even the remaining gap could be closed
 - Leap forward and let businesses compete for most efficient use of spectrum

To-Do in 202x:

- 700 Spectrum to be deployed for 5G coverage
- FWA – lateral competition with PON/HFC
- SA 5G
- 6GHz band for 6G capacity
- More spectrum on deployed bands (700/800/900/1800/2100/3600)
- 2G Sunset -> refarming to 5G
- Gradual movement of spectrum resources from 4G to 5G



Thank You!