Disclaimer

This presentation contains forward looking statements. Forward looking statements may be identified by the use of terms such as “outlook”, “believe”, “expect”, “anticipate”, “intend”, “plan”, “target”, “objective”, “estimate”, “goal”, “may”, “will” and similar terms, or by their context. These forward looking statements are based on beliefs, estimates and assumptions currently held by and information currently available to OMV. By their nature, forward looking statements are subject to risks and uncertainties, both known and unknown, because they relate to events and depend on circumstances that will or may occur in the future and are outside the control of OMV. Consequently, the actual results may differ materially from those expressed or implied by the forward looking statements.

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OMV – STRONG ASSET BASE

UPSTREAM

4+1 core and development regions
- CEE
- North Sea
- MEA
- Russia
- Australasia

1,15 bn boe
Reserves, 2017

437 kboe/d
Production, 3m/18

DOWNSTREAM OIL

3 refineries in Austria, Germany, Romania
36% participation in Borealis
~2,000 filling stations in 10 countries

17.8 mn t
Total refining capacity

2.5 mn t
Total petchem capacity

DOWNSTREAM GAS

113 TWh
Natural gas sales volume, 2017

30 TWh
Gas storage capacity

Positioned at the center of Europe’s transmission network

Long-term reliable partnerships with Europe’s major suppliers

17.8 mn t
Total refining capacity

2.5 mn t
Total petchem capacity
OMV – Integrated oil & gas company, geographically focused

Clean CCS Operating Result
2017

~40% Upstream
~30% Fuels
~20% Petrochemicals
~10% Gas

Group capital employed
based on 2017 capital employed plus Abu Dhabi and New Zealand acquisition

~70% Europe (Upstream and Downstream)
~20% MEA ¹ + Australasia
~10% Russia

¹ Middle East Africa

OMV

Capital Market Story, June 2018
WHY INVEST IN OMV

- Integrated and balanced portfolio of Upstream and Downstream ensures financial resilience

- Geographically focused and low-cost Upstream assets

- High quality assets and efficient operations in Downstream

- Strong organic free cash flow generation

- Well positioned for long-term growth in attractive regions through strong partnerships

- Progressive dividend policy: committed to delivering attractive shareholder returns
OMV's integrated and balanced portfolio pays off – resilient cash generation

Cash generation and oil price development

<table>
<thead>
<tr>
<th>Year</th>
<th>Oil price</th>
<th>Cash generation</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>3.3</td>
<td>99</td>
</tr>
<tr>
<td>2015</td>
<td>3.2</td>
<td>52</td>
</tr>
<tr>
<td>2016</td>
<td>3.0</td>
<td>44</td>
</tr>
<tr>
<td>2017</td>
<td>3.9</td>
<td>54</td>
</tr>
</tbody>
</table>

OMV Indicator refining margin, USD/bbl

1 Sources of funds: cash flow from operating activities excluding changes in net working capital; 2 in USD/bbl; 3 Corporate and Others

Capital Market Story, June 2018
Upstream – High-quality portfolio

Focused portfolio

4+1 core and development regions

► CEE
► North Sea
► MEA
► Russia

Production

3m/18 split by region, kboe/d

Low production cost

USD/boe

<table>
<thead>
<tr>
<th>Year</th>
<th>CEE</th>
<th>Russia</th>
<th>MEA</th>
<th>Australasia</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>8.8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3m/18</td>
<td>7.4</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Downstream Oil – European champion

Top refiner

1st quartile European refiner ¹ and olefin producer ²

Secure sales outlets

~ 50% of refinery production sold through retail and petrochemical outlets

Strong retail brands

in core markets and in premium fuels

Integrated oil value chain

Excellent management of the integrated oil value chain

¹ According to Solomon benchmark. Fuel Net Cash Margin, Cash Opex, Maintenance, Energy intensity
² According to Solomon benchmark. Olefins Cash Opex, Maintenance, Energy intensity
Downstream Gas – European integrated supplier

- **Integrated portfolio**: Integrated along the value chain from well to customer
- **Strong European presence**: From North West to South East Europe
- **Europe gas hub**: Positioned at the center of Europe’s transmission network in Austria
- **Reliable partnerships**: Long-term reliable partnerships with Europe’s major gas suppliers

---

1 OMV holds 51% stake in pipeline operator Gas Connect Austria
Stringent cost discipline

Cost savings program ¹
2015 normalized baseline, EUR mn

<table>
<thead>
<tr>
<th></th>
<th>Target</th>
<th>Delivered</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>100</td>
<td>200</td>
</tr>
<tr>
<td>2017</td>
<td>250</td>
<td>330</td>
</tr>
</tbody>
</table>

CAPEX ³
EUR bn

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2.8</td>
<td>1.9</td>
<td>1.7</td>
</tr>
</tbody>
</table>

1 Based on Operating Cost versus 2015 baseline according to OMV definition on a comparable basis
2 The 2017 target has been increased following the over-achievement in 2016 from EUR 150 mn to EUR 250 mn
3 CAPEX including capitalized Exploration and Appraisal expenditures and excluding Yuzhno Russkoye acquisition
Improved profitability

Clean CCS Operating Result
EUR bn

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>1.7</td>
<td>1.5</td>
<td>3.0</td>
</tr>
</tbody>
</table>

Clean CCS ROACE
%

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>8</td>
<td>7</td>
<td>14</td>
</tr>
</tbody>
</table>
Substantially improved financial performance

Clean CCS net income attributable to stockholders
EUR bn

<table>
<thead>
<tr>
<th>Year</th>
<th>Clean CCS net income attributable to stockholders, EUR bn</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>1.1</td>
</tr>
<tr>
<td>2016</td>
<td>1.0</td>
</tr>
<tr>
<td>2017</td>
<td>1.6</td>
</tr>
</tbody>
</table>

Oil price
USD/bbl

<table>
<thead>
<tr>
<th>Year</th>
<th>Oil price, USD/bbl</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>52</td>
</tr>
<tr>
<td>2016</td>
<td>44</td>
</tr>
<tr>
<td>2017</td>
<td>54</td>
</tr>
</tbody>
</table>

OMV Indicator refining margin, USD/bbl

<table>
<thead>
<tr>
<th>Year</th>
<th>OMV Indicator refining margin, USD/bbl</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>7.2</td>
</tr>
<tr>
<td>2016</td>
<td>4.7</td>
</tr>
<tr>
<td>2017</td>
<td>6.0</td>
</tr>
</tbody>
</table>

Clean CCS EPS
2017, EUR

<table>
<thead>
<tr>
<th>Year</th>
<th>Clean CCS EPS, EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>3.52</td>
</tr>
<tr>
<td>2017</td>
<td>4.97</td>
</tr>
</tbody>
</table>
Strong organic free cash flow

Organic free cash flow after dividends in 2017
Excluding acquisitions and disposals, EUR bn

- Reshaped and balanced portfolio of Upstream and Downstream assets drive cash generation
- Strong organic free cash flow enables further growth and attractive shareholder returns
OMV 2025 – Higher performance and more value ahead

► Leverage on proven concept of integration
► Significantly internationalize Upstream and Downstream
► Build strong gas market presence in Europe
► Extend record of operational excellence

Drive operating result and cash generation
Higher-quality Upstream portfolio

Focused international player

- 100% Reserve Replacement Rate

4+1 core regions

<table>
<thead>
<tr>
<th>Year</th>
<th>Production Volumes, kboe/d</th>
<th>Production Cost, USD/boe</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>348</td>
<td>8.8</td>
</tr>
<tr>
<td>2020</td>
<td>500</td>
<td>&lt;8</td>
</tr>
<tr>
<td>2025</td>
<td>600</td>
<td>&lt;8</td>
</tr>
</tbody>
</table>

1 3 years average

15 Capital Market Story, June 2018
Downstream Oil – Further strengthen European position and grow internationally

1st quartile

- Shift to higher value products
- Further increase captive sales volumes
- Export successful European business model internationally towards growing markets
- Increase petrochemical and refining capacity

Fuels
- Net cash margin
- Total cash OPEX
- Energy intensity index

Olefins
- Total cash OPEX
- Maintenance
- Energy intensity index

Solomon benchmarking for Schwechat and Burghausen refineries
Downstream Gas – Build strong market presence in Europe

>80% gas to be imported by 2030

380 bcm imports required

- Leading integrated supplier from North West to South East Europe
- Monetize increasing equity supply
- Double sales revenues and increase overall margins
- Leverage Nord Stream 2

1 Imports required in the European Union
Continue to grow value

Clean CCS Operating Result
EUR bn

- Positive free cash flow after dividends
- Long term gearing ratio target of ≤ 30%
- Progressive dividend policy
Maintain resilience

Oil price free cash flow break-even ¹
After dividends excluding acquisitions and disposals, USD/bbl

<table>
<thead>
<tr>
<th>Year</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>70</td>
</tr>
<tr>
<td>2016</td>
<td>35</td>
</tr>
<tr>
<td>2017</td>
<td>25</td>
</tr>
<tr>
<td>2020</td>
<td>~25</td>
</tr>
</tbody>
</table>

¹ Calculation of the oil price free cash flow break-even is based on the free cash flow after dividends excl. „Proceeds from sale of non-current assets“, „Net impact from the sale of subsidiaries and businesses, net of cash disposed“, „Acquisitions of subsidiaries and businesses, net of cash acquired“ and adjustments such as inflows related to securities and loan repayments or outflows related to Nord Stream 2

Generating cash, delivering value

Efficient CAPEX spending
Capturing value-accrative growth opportunities

Sustainable generation of organic free cash flow
Integrated business model and balanced portfolio

Further streamlining of portfolio
Leveraging digitalization and maintaining cost efficiency
Capital allocation priorities

1. CAPEX
2. Acquisitions
3. Dividends
4. Debt reduction

ROACE TARGET ≥12%
Mid- and long-term
Focused investments

CAPEX
EUR bn

2015-2017
- 2.1
Ø p.a.

2018-2025
2.0 - 2.5
Ø p.a.

- Efficient capital allocation
- Strict cost management

Acquisitions
EUR bn

2015-2017
- 1.8

8 years

3 years

2018-2025
10

- Value adding acquisitions
- Keep optionality and flexibility
- Invest along the value chain

Downstream

Upstream
M&A criteria – focus on cash and value

Strategic criteria

- Balanced Upstream and Downstream portfolio
- Focus on low-cost and hydrocarbon-rich countries in defined Upstream core regions
- Proximity to growing markets in Downstream
- Balanced risk profile in terms of geography and applied technology

Financial criteria

- ROACE ≥12%

Strategic fit

- Free cash flow positive mid-term
- Timely cash generation with a focus on producing and fast ramping-up assets
- Resilient cash flow generation

Cash profile

- Defined investment hurdles considering business risks, country risks, technology risks
- Value accretive

Return profile

Capital Market Story, June 2018
Strong track record in portfolio management

- **Expanded footprint in Libya**
  - Signed basic agreement on asset swap with Gazprom
  - Dec 15, 2016

- **Investments**
  - Sold 49% in the regulated gas transmission business
  - Dec 14, 2016

- **Divestments**
  - Disposed CAPEX intensive Upstream UK business
  - Jan 13, 2017
  - Divested OMV Petrol Ofisi
  - June 13, 2017
  - Sold minor offshore field in Tunisia
  - Aug 2, 2017

- **2018**
  - Acquired share in one of largest gas fields: Yuzhno Russkoye
  - Nov 29, 2017

- **Expanded footprint in New Zealand**
  - OMV awarded 20% share in two oil fields in Abu Dhabi
  - Feb 28, 2018

- **Divestments**
  - Sold 49% in the regulated gas transmission business
  - March 15, 2018
  - Divested OMV Petrol Ofisi
  - April 29, 2018

- **Investments**
  - Sold minor offshore field in Tunisia
  - Feb 28, 2018

- **Divestments**
  - Sale of Pakistan Upstream business
  - March 15, 2018
Acquisition of a 20% stake in two offshore fields in Abu Dhabi from ADNOC

► OMV signed a concession agreement for the acquisition of a 20% stake in two offshore oil fields from ADNOC:
  ► Satah Al Razboot (SARB) including the satellite fields Bin Nasher and Al Bateel
  ► Umm Lulu

► Commencement of concession on March 9, 2018
► Concession valid until March 8, 2058
► Participation fee of USD 1.5 bn
<table>
<thead>
<tr>
<th><strong>Abu Dhabi – high-quality assets with substantial cash generation</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Adding 450 mn bbl to OMV’s reserve base</strong></td>
</tr>
<tr>
<td>▶ Substantially strengthening OMV’s reserves base</td>
</tr>
<tr>
<td>▶ Upside potential from satellite fields</td>
</tr>
<tr>
<td><strong>≥ 40 kbbl/d long-term plateau production (net to OMV)</strong></td>
</tr>
<tr>
<td>▶ Plateau production to be reached early in the next decade</td>
</tr>
<tr>
<td>▶ Long-term plateau</td>
</tr>
<tr>
<td><strong>Substantial free cash flow</strong></td>
</tr>
<tr>
<td>▶ Long-term stable and substantial free cash flow</td>
</tr>
<tr>
<td>▶ Annual CAPEX of ~USD 150 mn in the first 5 years</td>
</tr>
<tr>
<td><strong>Strengthening partnerships</strong></td>
</tr>
<tr>
<td>▶ Strengthening strategic partnership with ADNOC</td>
</tr>
<tr>
<td>▶ Build material position in one of the world’s richest region in hydrocarbons</td>
</tr>
</tbody>
</table>
Acquisition in New Zealand – Major step towards building Australasia into a new core region

► Acquisition of Shell’s Upstream business in New Zealand:
  ► Increased stake in Pohokura by 48% and in Maui by 83.75%
    (31 kboe/d in Jan-Feb 2018)
  ► 60.98% interest in the Great South Basin exploration block
► OMV intends to assume operatorship in both joint ventures
► Purchase price USD 578 mn
► Effective date January 1, 2018
► Closing expected end 2018

1 Subject to conditions, including New Zealand Commerce Act and Overseas Investment approvals

Adding up to 100 mn boe of recoverable resources
Immediate production contribution at closing
Strong free cash flows
Major step towards building a new core region

FPSO Raroa and Ensco drilling rig, Maari field, New Zealand
## Attractive shareholder return

### Annualized Total shareholder return

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>Last three years</th>
<th>Last five years</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OMV</strong></td>
<td>61%</td>
<td>39%</td>
<td>18%</td>
</tr>
<tr>
<td><strong>Peers</strong></td>
<td>20%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>ATX</strong></td>
<td>34%</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>FTSEUR1ST 300 OIL &amp; GAS</td>
<td>6%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>FTSE EUROTOP 100</td>
<td>9%</td>
<td>6%</td>
<td>9%</td>
</tr>
</tbody>
</table>

1. BP, ENI, Galp, Lundin Petroleum, MOL, Neste Oil, PKN Orlen, Repsol, Shell, Statoil, Total, Tupras
2. Source: NASDAQ
Progressive dividend policy

Record dividend of EUR 1.50 per share for 2017 proposed

We are committed to delivering an **attractive and predictable shareholder return** through the business cycle

**Progressive dividend policy:** OMV aims to increase the dividend or at least maintain it at the previous year’s level in line with the Group’s financial performance
Financial priorities and long-term targets

- Positive free cash flow after dividends
- Competitive shareholder returns
- Growing Clean CCS net income attributable to stockholders
- ROACE $\geq 12\%$
- Gearing ratio $\leq 30\%$
- Strong investment grade credit rating
Upstream – at a Glance

2017 position

- **348 kboe/d production** (3m/18: 437 kboe/d) with an oil and gas split of 52:48
- **Production cost at USD 8.8/boe** (3m/18: USD 7.4/boe)
- **1P Reserves of 1,146 mn boe**
- **Reserve Replacement Rate of 116%** on a 3 years average

Competitive advantages

- **Focused portfolio with 4+1 regions**
- **Well positioned in attractive regions**
- **Low production cost**
- **Strong partnerships** with the major players in the richest hydrocarbon regions
Growing production, lowering cost

**Production**

Kboe/d

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>3m/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australasia</td>
<td>303</td>
<td>311</td>
<td>348</td>
<td>437</td>
</tr>
<tr>
<td>MEA</td>
<td>20</td>
<td>18</td>
<td>17</td>
<td>15</td>
</tr>
<tr>
<td>North Sea</td>
<td>48</td>
<td>71</td>
<td>79</td>
<td>75</td>
</tr>
<tr>
<td>Russia</td>
<td>211</td>
<td>202</td>
<td>196</td>
<td>190</td>
</tr>
<tr>
<td>CEE</td>
<td>202</td>
<td>196</td>
<td>190</td>
<td>106</td>
</tr>
<tr>
<td>CEE</td>
<td>48</td>
<td>71</td>
<td>79</td>
<td>75</td>
</tr>
</tbody>
</table>

**Production cost**

USD/boe

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>3m/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>13.2</td>
<td>10.6</td>
<td>8.8</td>
<td>7.4</td>
</tr>
</tbody>
</table>

1 OMV aligned the production cost definition with its industry peers; since Q1/17, administrative expenses and selling and distribution costs are excluded; for comparison only, 2016 figures presented in the table were re-calculated.
Increased earnings

Clean Operating Result
EUR mn

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>117</td>
<td>40</td>
<td>1,225</td>
</tr>
</tbody>
</table>

Clean Operating Result
EUR mn

<table>
<thead>
<tr>
<th>Quarter</th>
<th>3m/17</th>
<th>3m/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>321</td>
<td>438</td>
</tr>
</tbody>
</table>

1 OMV aligned the production cost definition with its industry peers; since Q1/17, administrative expenses and selling and distribution costs are excluded; for comparison only, 2016 figures presented in the table were re-calculated.

Oil price, USD/bbl

<table>
<thead>
<tr>
<th>Quarter</th>
<th>3m/17</th>
<th>3m/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>54</td>
<td>67</td>
</tr>
</tbody>
</table>
Strengthened reserve base

1P Reserves
Mn boe

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEE</td>
<td>1,028</td>
<td>1,030</td>
<td>1,146</td>
</tr>
<tr>
<td>MEA</td>
<td></td>
<td></td>
<td>186</td>
</tr>
<tr>
<td>North Sea</td>
<td>110</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Russia</td>
<td>194</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Reserve Replacement Rate
3 years Ø RRR, %

- CEE: 73, 70, 77
- MEA: 15
- Russia: 110
- North Sea: 186

1P Reserve Replacement Cost
1 year Ø, USD/boe

- CEE: 58, 17, 10
- MEA: 31
- Russia: 73
- North Sea: 77

1 Source: IHS Markit (Anadarko, Apache, BP, ENI, Hess Corp, Lukoil, Murphy, Occidental, Repsol, Shell, Statoil, Total)

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Upstream strategy 2025

- Renew and improve the quality of our asset base
- Double reserves
- Extend track record of operational excellence
- Increase cash generation

Higher-quality portfolio generating more cash
Drive production organically and via acquisitions

Production growth
Kboe/d

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2020</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisitions</td>
<td>348</td>
<td>&gt;420</td>
<td>500</td>
<td>600</td>
</tr>
<tr>
<td>Organic growth</td>
<td>348</td>
<td>&gt;420</td>
<td>500</td>
<td>600</td>
</tr>
</tbody>
</table>

Excluding acquisitions and divestments

Production cost
both in 2020 and 2025
USD/boe

<8
Ensure sustainable reserve replenishment

1P Reserve development
Bn boe

<table>
<thead>
<tr>
<th>Year</th>
<th>1P Reserve development</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>1.1</td>
</tr>
<tr>
<td>2025</td>
<td>&gt;2.0</td>
</tr>
</tbody>
</table>

1P Reserves
2x

Reserve Replacement Rate
3 years Ø, %
>100

Reserve life years
8-10

Gas share %
>50

Capital Market Story, June 2018
Exploration: Faster and more disciplined approach

Excellent Barents Sea track record

- Increase size and quality of E&A portfolio
- Grow in OMV core and development regions
- Achieve faster monetization of discoveries
- Apply proven excellence in exploration
  - Play opening successes in Wisting, Neptun, Han Asparuh through application of OMV geological concepts – all with first well

1st well as new play opener

Successful appraisal campaign

World-record drilling

E&A budget
EUR mn p.a.¹

Wells
p.a.

300
15-20

¹ Subject to change based on overall growth
² Wisting Central II shallowest horizontal offshore well drilled from a floating drilling facility

39 | Capital Market Story, June 2018
Technology drives recovery and reduces downtime

- **Highlights**
  - Mean-time-between-failure of producing wells of over 1,900 days (Austria)
  - Reduced number of well interventions per year from over 150,000 to below 6,000 (Romania)
  - Low cost drilling and drilling world records
  - Over 80% automated wells (Austria)

- **Objectives**
  - Increase ultimate recovery rate by 10 percentage points in selected fields
  - Apply nanotechnology for corrosion and wear prevention
  - Make the most effective use of digital technologies

---

1 From 2005 to 2017, OMV closed the acquisition of a 51% stake in Petrom in December 2004
2 Top quartile cost per meter dry hole, Romania, Rushmore benchmark

---

Schematic picture of the polymer injection process

---

**Austria as technology center for international roll-out**

---

Capital Market Story, June 2018
Transform OMV Upstream into a top digital player

- **Project examples**
  - Drilling cockpit for real-time collaboration
  - Latest 3D visualization technology for geological interpretation
  - Machine learning and cloud solutions for seismic data processing

- **Future objectives**
  - Faster project evaluation for better decision making
  - Worldwide digital access to knowledge, tools, people
  - Accelerated innovation through idea crowdsourcing

**DigitUP: Global Upstream digitalization program to improve competitive position**
Focus on 4+1 regions

OMV Upstream regions

- Core region – CEE
- Core region – North Sea
- Core region – MEA
- Core region – Russia
- Development region – Australasia
- Growth

Note: Madagascar not depicted in map

1 Sale agreement for the divestment of OMV Pakistan signed on February 28, 2018

Capital Market Story, June 2018
CEE – Sustain value generation in Romania and Austria, realize Black Sea potential

Strategic direction

- Maximize profitable recovery
  - Infill drillings, workovers, selected field re-developments
  - Strict cost management (CAPEX, production cost)
  - Explore in Romania onshore, the Black Sea and Austria

- Mature Neptun
  - First gas in 2020+
  - Resources Domino-1 discovery of up to 250 mn boe

- Continue active portfolio management
  - Pursue regional growth
  - Divest additional marginal fields in Romania

All figures net to OMV

1 OMV Petrom initial estimate as communicated for the Domino-1 well in February 2012

Capital Market Story, June 2018
Extensive engineering activities – Neptun Deep, Black Sea, Romania

Neptun Deep – Project Phase: Engineering (pre-FID)

- **Licensees:** ExxonMobil (Operator, 50%), OMV Petrom (50%)

- **Domino-1 discovery in 2012** (first offshore deep water exploration well)

- Preliminary estimate recoverable resources: 0.75-1.5 tcf (21-42 bcm; 125-250 mn boe), net to OMV Petrom

- **Joint Venture Expenditures to date (Exploration & Appraisal) over USD 1.5 bn**

- Second exploration drilling campaign successfully finalized in January 2016
  - Drilled 7 wells into different structures in the Neptun Block
  - Successful well test of Domino structure

- **Engineering activities** ongoing for a combined Domino & Pelican South Development concept

- **Potential key contributor to OMV RRR target**

- **FID expected second half of 2018**

---

1 OMV Petrom initial estimation, as communicated in February 2012.
2 Gross value
Russia – Build upon huge potential

Strategic direction

- **Realize organic growth potential**
  - 100 kboe/d from Yuzhno Russkoye over next years
  - Upside from Turonian reservoir layer

- **Continue growth path with Achimov IV/V**
  - Conclude asset swap with Gazprom by end 2018
  - First gas in 2020
  - Production of 80 kboe/d in 2025

- **>1 bn boe recoverable reserves**
  - Yuzhno Russkoye and Achimov to contribute to OMV’s RRR in the long run

- **Review further acquisition opportunities**

---

All figures net to OMV

1 As per operator

Capital Market Story, June 2018
Russia – Yuzhno Russkoye and Achimov IV/V provides OMV with stable and sustainable production

- Stable production flow for a very long period of time
- Production of ~150 kboe/d will be reached in 2025
- Achimov IV/V and Yuzhno Russkoye add more than 1 bn boe to OMV’s reserves
- Cash inflow from Yuzhno Russkoye (dividends of approx. USD 200 mn p.a. mid-term) will be used to fund the capital needs of Achimov IV/V

1 OMV’s indicative view on production profiles. OMV closed the acquisition of a 24.99% share in Yuzhno Russkoye gas field. OMV signed a binding basic agreement with Gazprom for a 24.98% stake in Achimov IV/V in December 2016.

OMV production contribution from Russian fields ¹
Kboe/d

<table>
<thead>
<tr>
<th>Year</th>
<th>Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>~100 kboe/d</td>
</tr>
<tr>
<td>2019</td>
<td>~100 kboe/d</td>
</tr>
<tr>
<td>2020</td>
<td>~100 kboe/d</td>
</tr>
<tr>
<td>2021</td>
<td>~100 kboe/d</td>
</tr>
<tr>
<td>2022</td>
<td>~100 kboe/d</td>
</tr>
<tr>
<td>2023</td>
<td>~100 kboe/d</td>
</tr>
<tr>
<td>2024</td>
<td>~100 kboe/d</td>
</tr>
<tr>
<td>2025</td>
<td>~150 kboe/d</td>
</tr>
</tbody>
</table>

¹ Source: Gazprom
Achimov IV/V – Asset swap

OMV’s share of Achimov's IV/V production development

Kboe/d

- Binding basic agreement signed
  - OMV to receive a 24.98% stake in Achimov IV/V blocks, Urengoy natural gas and condensate field
  - Gazprom to receive a 38.5% participation in OMV’s wholly owned subsidiary OMV (NORGE) AS

- Investments
  - 40% of total EUR 900 mn CAPEX to be invested for 2017 and 2018 after closing
  - Leverage on already built infrastructure and pipeline system of Achimov I and II

- Take-or-pay agreement
  - Pricing structure: ~70% gas - partly sold at Russian domestic prices; remainder sold at European netback prices by the joint venture. ~30% condensate with better margins than gas
  - Will be shown in the income statement as equity-accounted investment
  - Closing expected by end of 2018
North Sea – Secure long-term sustainable contribution

Strategic direction

- Bring Aasta Hansteen on stream
  - First gas in Q4 2018
  - Cumulative gas production of up to 43 mn boe
  - Peak production of 18 kboe/d
  - Snefrid Nord to be developed as a tie-back

- Mature Wisting
  - First oil in mid 2020s
  - Total recoverable oil resources of up to 130 mn bbl
  - Latest successful appraisal well in Q3 2017

- Expand exploration portfolio leading to discoveries
  - 34 licenses, thereof 7 operated ¹ – 5 more licenses to come soon (May 2018), once the deals are approved by Authorities
  - Hades and Iris discoveries in the Norwegian Sea (20-115 mn recoverable boe respectively 20-130 mn recoverable boe) in April 2018

¹ Status as of April 27, 2018

All figures net to OMV.

Capital Market Story, June 2018
Platform successfully anchored – Aasta Hansteen, Norwegian Sea, Norway

Aasta Hansteen field – Project Phase: Execution

- **Licensees**: Statoil (Operator, 51%), Wintershall (24%), OMV (15%), ConocoPhillips (10%)
- **Cumulative production of dry gas (from three discoveries)** 1: ~43 mn boe
- **Production start**: expected in Q4 2018
- **Peak production** 1: ~18 kboe/d
- Deep water development with first floating Spar platform in Norway and the largest in the world 2
- **Status**: Platform towed to field for installation; anchoring successfully achieved
- Snefrid Nord to be developed as a tie-back to Aasta Hansteen

Polarled Project

- 480 km offshore gas pipeline from Nyhamna to Aasta Hansteen installed
- Expansion of Nyhamna gas plant finalized, start-up in 2018
- OMV share ~9%

---

1 All figures net to OMV unless otherwise stated.
2 160,000 barrels condensate storage capacity.
OMV’s oil discovery – Wisting, Barents Sea, Norway

Wisting, Norway – Project Phase: Appraisal

- **Licensees:** OMV (Operator, 25%), Petoro, Idemitsu (each 20%) and Statoil (35%)

- Estimated 50-125 mn bbl (net to OMV) total recoverable oil resources within PL 537; location: approx. 300 km off the north coast of Norway

- **Final investment decision (FID):** 2020/2021

- **Production start:** mid 2020s
Middle East and Africa – Grow and access potential in Middle East & Africa

Strategic direction
- Secure stable contribution from Libya
  - Maintain and grow production level
  - Assess Nafoora field expansion
  - Evaluate exploration potential
- Deliver Nawara gas project in Tunisia
  - First gas in 2019
  - Peak production of 10 kboe/d
- Enhance value in Kurdistan Region of Iraq
  - Further develop Khor Mor field and realize upside
- Develop UAE position
- Pursue growth options in the region (e.g. Iran, Iraq)

Current developments/highlights
- UAE: signed concession agreement with ADNOC for acquisition of 20% interest in Umm Lulu and SARB offshore fields
- Pakistan: divestment of Upstream business signed; closing expected 2018

All figures net to OMV 1 KRI = Kurdistan Region of Iraq
Abu Dhabi – High-quality assets with substantial cash generation

► OMV signed a concession agreement for the acquisition of a 20% stake in two offshore oil fields from ADNOC:
  ► **Satah Al Razboot (SARB)** including the satellite fields Bin Nasher and Al Bateel
  ► **Umm Lulu**

► Commencement of concession on March 9, 2018
► Concession valid until March 8, 2058
► Participation fee of USD 1.5 bn

► ≥40 kbbl/d long-term plateau production (net to OMV)
► Adding 450 mn bbl to OMV’s reserve base
► Long-term stable and substantial free cash flow
► Annual CAPEX of ~USD 150 mn in the first 5 years
OMV’s growth project in Tunisia – Nawara, Tunisia

Nawara field – Project Phase: Execution

- **Licensees:** OMV (Operator, 50%), ETAP (50%)
- **Cumulative production**: 40-50 mn boe of gas
- **Production start:** expected in 2019
- **Peak production**: ~10 kboe/d
- **Short description:** development of Nawara onshore gas concession to provide for commercial gas sales of 2.4 mn Sm3/d. In addition, condensate (6.5 mn bbl) and LPG (8.5 mn bbl extracted at the GTP) will be produced and sold.
- **Status:** Project progress (~89% complete): impacted by social and political unrest in Tataouine; working on solutions to minimize impact on delivery of first gas, evaluation ongoing
  - Gas Treatment Plant: 96%
  - Central Processing Facility: 86%
  - Pipeline: 94%

Gas and LPG sales agreement signed; CPF Condensate Transportation Agreement also signed

---

1 All figures net to OMV
Project progress status as of March 31, 2018
Australasia – Expand footprint

Strategic direction

- **Realize upside of current position in New Zealand**
  - Strong and stable cash generator
  - Highly profitable production
- **Exploit promising exploration potential** (approx. 35 000 km²)
- **Develop Australasia into a core region**
  - Evaluate further opportunities in the wider area

Current developments/highlights

- **Acquisition of Shell’s Upstream business in New Zealand**
  - Main interest in producing fields: Pohokura (48%) and Maui (83.75%)
  - Exploration and development projects: Great South basin exploration block (82.93% total OMV share)
  - Acquisition likely to be completed in 2018

All figures net to OMV
Acquisition in New Zealand – Major step towards building Australasia into a new core region

- Adding up to 100 mn boe of recoverable resources
- Immediate production contribution at closing
- Strong free cash flows
- Major step towards building a new core region

- Increased stake in Pohokura by 48% and in Maui by 83.75% (31 kboe/d in Jan-Feb 2018)
- 60.98% interest in the Great South Basin exploration block
- OMV intends to assume operatorship in both joint ventures
- Purchase price USD 578 mn
- Effective date January 1, 2018
- Closing expected end 2018

---

1 Subject to conditions, including New Zealand Commerce Act and Overseas Investment approvals

55 | Capital Market Story, June 2018
Upstream pipeline

New ventures
- MEA
- SEA

Exploration
- Austria
- Romania deep onshore
- Black Sea
- Norway
- New Zealand

Appraisal
- Neptun Deep (Romania, Black Sea)
- Wisting (Norway)

Development & Execution
- Aasta Hansteen (Norway)
- Nawara (Tunisia)
- Umm Lulu \(^1\)/ SARB (United Arab Emirates)
- Achimov IV/V (Russia) \(^2\)

As of March 2018
\(^1\) Early production
\(^2\) Basic agreement signed on December 14, 2016
### Development & Execution

<table>
<thead>
<tr>
<th>Project</th>
<th>Country</th>
<th>Type</th>
<th>Production start year</th>
<th>Cumulative production (^1) mn boe</th>
<th>Peak production kboe/d</th>
<th>Working interest %</th>
<th>Operated</th>
<th>FID year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aasta Hansteen</td>
<td>Norway</td>
<td>Gas</td>
<td>2018</td>
<td>~43</td>
<td>~18</td>
<td>15.0</td>
<td>no</td>
<td>2012</td>
</tr>
<tr>
<td>Nawara</td>
<td>Tunisia</td>
<td>Gas</td>
<td>2019</td>
<td>40-50</td>
<td>~10</td>
<td>50.0</td>
<td>by OMV</td>
<td>2014</td>
</tr>
<tr>
<td>Achimov IV/V (^2)</td>
<td>Russia</td>
<td>Gas/Condensate</td>
<td>2020</td>
<td>560</td>
<td>&gt;80</td>
<td>24.98</td>
<td>no</td>
<td>2016</td>
</tr>
</tbody>
</table>

### Appraisal

<table>
<thead>
<tr>
<th>Project</th>
<th>Country</th>
<th>Type</th>
<th>Production start year</th>
<th>Cumulative production (^1) mn boe</th>
<th>Working interest %</th>
<th>Operated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neptun Deep</td>
<td>Romania</td>
<td>Gas</td>
<td>post 2020</td>
<td>125-250 (^3)</td>
<td>50.0 (^4)</td>
<td>no</td>
</tr>
<tr>
<td>Wisting</td>
<td>Norway</td>
<td>Oil</td>
<td>post 2020</td>
<td>up to 130</td>
<td>25.0</td>
<td>by OMV</td>
</tr>
</tbody>
</table>

All figures net to OMV; as of March 31, 2018

\(^1\) Expected cumulated field life production  
\(^2\) Basic agreement signed on December 14, 2016  
\(^3\) As communicated for the Domino-1 well in February 2012  
\(^4\) Via OMV Petrom
Strategic partnerships enable access to competitive upstream positions

**Long-term cooperation along the entire integrated value chain**
- Decade-long cooperation in the Downstream Gas business
- Access competitive upstream assets (24.98% share in Achimov IV/V) in return for a 38.5% share in OMV (NORGE) AS

**Strengthen relationship in combination with newly acquired upstream position**
- Technical Evaluation Agreement for North West Offshore Abu Dhabi
- MoU for Downstream cooperation

**Intensifying partnership with the National Oil Corporation of Libya**
- Excellent OMV position in Libya ("NOC partner of choice") with continuous engagement since 1975
- Recent expansion in the Sirte Basin
OMV Aktiengesellschaft

Downstream
Downstream Oil in a nutshell

2017 position

- **17.8 mn t** (325 kboe/d) annual **refining capacity** in Austria, Germany and Romania
- **2.5 mn t** petrochemical production capacity
- **36%** share in Borealis - leading polyolefin producer globally
- **~2,000 retail sites** in 10 countries

Competitive advantages

- **#1st quartile** European refiner\(^1\) and olefin producer \(^2\)
- High share of **secure product outlets**
- Best in class refinery utilization rate (>90%)
- Strong **retail brands** in core markets and premium fuels
- Excellent management of **integrated oil value chain**
Downstream Oil Value Chain

2017 figures

Crude supply

- Equity crude production: 4.3 mn t
- Crude from third parties: 11.7 mn t

Refinery production

- Crude oil refining: 16 mn t
  (90% utilization rate of 17.8 mn refining capacity)
- Purchase of semi-finished products: 1.4 mn t

Product supply and logistics

- Purchase of products: 4.0 mn t
- Storage
- Rail/truck/ship

Petrochemical/ commercial/ retail sales

- Retail: 6.2 mn t
- Business-to-business: 9.5 mn t
- Aviation: 1.9 mn t
- Petrochemicals: 2.2 mn t
- OMV Petrol Ofisi: 4.0 mn t

Customer allocation in %

- Captive market: 47%
- Wholesale: 53%

Notes:
1 10% internal consumption to be deducted.
2 Volume includes blending components and excludes purchase of products for OMV Petrol Ofisi
3 OMV Petrol Ofisi divested in June 2017
4 Retail and petrochemical sales
Downstream Gas in a nutshell

2017 position
- ~11 bcm natural gas sales, out of which ~70% equity supplied
- 51% share in Gas Connect Austria, the Austrian pipeline operator
- >3 bcm gas storage capacities in Austria and Germany
- 1 LNG terminal in Rotterdam
- 2 gas-fired power plants in Romania and Turkey

Competitive advantages
- Integrated gas value chain from well to customer
- Positioned at the center of Europe’s transmission network in Baumgarten (Austria)
- Long-term reliable partnerships with Europe’s major gas suppliers
Downstream Gas Value Chain

2017 figures

Gas supply

Equity production in Romania
49 TWh

Equity production in Norway
19 TWh

Equity production in Austria
9 TWh

Purchase from Russia
72 TWh

Purchase from Norway
8 TWh

Gas supply portfolio
157 TWh

Gas logistics

Gas logistics business (including transit gas)

Gas pipeline transportation (Gas Connect Austria)
1,499 TWh

Gas storage volume sold
16 TWh

Gas marketing sales

Gas sales to third parties
113 TWh

Sales in Europe
57 TWh

Sales in Romania
45 TWh

Sales in Turkey
11 TWh

Internal consumption and balancing

Sales in Europe

1 Excluding Romania

Gas sales to third parties
113 TWh

Sales in Europe
57 TWh

Sales in Romania
45 TWh

Sales in Turkey
11 TWh

1 Excluding Romania

Gas pipeline transportation (Gas Connect Austria)
1,499 TWh

Gas storage volume sold
16 TWh

Internal consumption and balancing

1 Excluding Romania
Best in class refinery utilization rate and stable sales

Refined product sales (mn t)

- 2015: 30.0
- 2016: 30.7
- 2017: 23.8

Natural gas sales (TWh)

- 2015: 110
- 2016: 109
- 2017: 113

Retail sales (mn t)

- 2015: 10.3
- 2016: 10.4
- 2017: 8.1

Refinery utilization rate (%)

- 2015: 93
- 2016: 89
- 2017: 90

OMV Petrol Ofisi divested in June 2017

OMV Petrol Ofisi divested in June 2017

Capital Market Story, June 2018
Strong contributor to OMV Group financials

Improvement in operations
Clean CCS Operating Result, EUR bn

<table>
<thead>
<tr>
<th>Year</th>
<th>Gas 12%</th>
<th>Petrochemicals 36%</th>
<th>Fuels 51%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>0.9</td>
<td>0.6</td>
<td>0.1</td>
</tr>
<tr>
<td>2016</td>
<td>1.5</td>
<td>0.2</td>
<td>0.7</td>
</tr>
<tr>
<td>2017</td>
<td>1.8</td>
<td>0.2</td>
<td>0.9</td>
</tr>
</tbody>
</table>

Refining Margin, USD/bbl

7.2 4.7 6.0

Strong cash flow generator
Free cash flow, EUR bn

<table>
<thead>
<tr>
<th>Year</th>
<th>Operating cash flow minus cash flow for investments</th>
<th>Divestments</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>0.8</td>
<td>0.2</td>
</tr>
<tr>
<td>2016</td>
<td>1.3</td>
<td>0.2</td>
</tr>
<tr>
<td>2017</td>
<td>1.7</td>
<td>0.9</td>
</tr>
</tbody>
</table>

Attractive returns

<table>
<thead>
<tr>
<th>Year</th>
<th>RONA 2 in %</th>
<th>Average net assets in bn EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>14</td>
<td>9.2</td>
</tr>
<tr>
<td>2016</td>
<td>14</td>
<td>8.8</td>
</tr>
<tr>
<td>2017</td>
<td>18</td>
<td>7.9</td>
</tr>
</tbody>
</table>

1 Including 324 mn EUR cash flow for investments in Nord Stream 2 in 2017
2 Return On Net Assets = NOPAT divided by average net assets, expressed as a percentage
Downstream strategy 2025

Europe
- **Downstream Oil**: Further strengthen competitive position
- **Downstream Gas**: Become the leading integrated supplier with a strong market presence from North West to South East Europe

International
- Export successful European refining and petrochemical business model to international growth markets
- Increase petrochemical and refining capacity
Europe – further grow competitive position

Cash generator

- Operational excellence
- Shift to higher value products
- Further increase captive sales channels
- Double gas sales volumes
- Stringent cost management
OMV will upgrade its European refining assets to market changes

<table>
<thead>
<tr>
<th>European market 2016 - 2025</th>
<th>OMV European production volume 2025</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Change</td>
</tr>
<tr>
<td>Petrochemicals</td>
<td>+12%</td>
</tr>
<tr>
<td>Fuels – Jet</td>
<td>+23%</td>
</tr>
<tr>
<td>Fuels – Gasoline &amp; Diesel</td>
<td>(5)%</td>
</tr>
<tr>
<td>Heavy Products</td>
<td>(51)%</td>
</tr>
</tbody>
</table>

- **Up to EUR ~ 1 bn** planned investments for upgrades in 2018 - 2025
- Increase production of **petrochemicals**
- Maximize **jet fuel production** and leverage the direct pipeline connection to Vienna and Munich airports
- Become **heavy fuel oil free** in Western refineries
- Upgrade to higher value products in **Petrobrazi refinery**
- **Stable total refining** capacity of 17.8 mn t
Continuous efforts on operational excellence

- Optimize asset utilization through intermediate product exchanges
- Increase the share of higher value products with minimum investments
- Identify and maximize high margin feedstock
- EUR ~ 50 mn benefits yearly

3 refining sites  =  1 integrated refinery concept
OMV Retail – strong brands driving value growth

- Petrom:
  - ~25% of network
  - Most trusted retail brand in Romania
  - Pilot cooperation with hypermarket Auchan

- Avanti and Diskont:
  - ~10% of network
  - Perceived as most competitive in pricing

- OMV:
  - ~65% of network
  - Premium fuels; share in sales doubled since 2012
  - Leading shop and gastronomy concept in CEE
  - Non-oil business is one third contributor to retail margin
Retail ambitions for the future

Profitability turnaround in last 6 years
Operating Result per filling station, EUR 1,000 ¹

Highly efficient retail stations
Average throughput per station, mn liters ²

- Maintain retail profitability in a declining market
- Grow non-oil business as key differentiator to attract customers
- Further optimize cost efficiencies

Increase sales volumes
- Average throughput per station above country market averages
- Increase market share in Austria and expand to South German, Hungarian and Slovenian discount retail market

¹ Excluding OMV Petrol Ofisi
² Country averages. Source: Wood Mackenzie
Strong petrochemicals position in Europe and potential for future growth

<table>
<thead>
<tr>
<th>Production capacity</th>
<th>Clean CCS Operating Result petrochemicals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mn t p.a.</td>
<td>EUR mn</td>
</tr>
<tr>
<td>Ethylene</td>
<td>1.8</td>
</tr>
<tr>
<td>Propylene</td>
<td></td>
</tr>
<tr>
<td>Butadiene and aromatics</td>
<td></td>
</tr>
<tr>
<td>Steam cracker expansion</td>
<td>Burghausen by 2021</td>
</tr>
</tbody>
</table>

- Strong partnerships with long-term customers
- Projects under preparation
  - Increase production of higher value butene (high purity iso-butene) by 2020
  - Steam cracker expansion in Burghausen by 2021

- Petrochemical projects under evaluation
  - Evaluate expansion in Schwechat together with Borealis
  - Evaluate potential for Petrobrazi refinery
  - Screen market for petrochemical opportunities

1 Ethylene/propylene net margin at the level of actual 2017. Butadiene margin 2017 normalized.
The share in Borealis is a core asset in OMV Downstream and a basis for further growth

Polyolefin production capacity
Mn t p.a.

Borealis
- #6 in polyolefins globally (incl. 100% of Borouge)
- #2 in polyolefins in Europe
- JV with ADNOC in Borouge, Abu Dhabi – largest polyolefin site in the world
- Growth projects in USA and UAE
- Strong contributor to OMV’s profitability (36% share in Borealis)

Borealis – OMV cooperation
- Site integration „across the fence“ in Schwechat and Burghausen
- Operational synergies
OMV will further improve its best in class captive sales volume

- Equity crude oil processed  
  - % of refining capacity:
    - Peers: 9%  
    - OMV 2017: 25%  
    - OMV 2025: 21%

- Petrochemical sales volume  
  - % of refining capacity:
    - Peers: 7%  
    - OMV 2017: 12%  
    - OMV 2025: 15%

- Retail sales volume  
  - % of refining capacity:
    - Peers: 24%  
    - OMV 2017: 35%  
    - OMV 2025: 40%

- Captive sales outlets  
  - %:
    - Peers: 31%  
    - OMV 2017: 47%  
    - OMV 2025: 55%

OMV – top refinery utilization in Europe  
≥ 90%

OMV in 2017 excluding OMV Petrol Ofis
Europe needs more natural gas

Increasing European gas demand supported by the switch from coal to gas

Declining European indigenous production requires further gas import volumes

Source: IEA 2017, OMV analysis

EU-28 gas supply and demand
Billion cubic meter (bcm)

<table>
<thead>
<tr>
<th>Imports</th>
<th>EU-28 production</th>
</tr>
</thead>
<tbody>
<tr>
<td>~330</td>
<td>~130</td>
</tr>
<tr>
<td>~375</td>
<td>~85</td>
</tr>
</tbody>
</table>

Demand 2016

Demand 2030

Source: IEA 2017, OMV analysis

75 | Capital Market Story, June 2018
OMV aims to double the natural gas sales and build a strong market presence in Europe

- **Increase equity gas volumes** in Norway, Romania and Russia
- Leverage **Nord Stream 2** to support Baumgarten hub
- **Secure utilization** of LNG terminal in Rotterdam
- Increase sales volumes to **>20 bcm by 2025**
- Reach **10%** market share in **Germany**
- Evaluate **inorganic growth options** in commercially attractive business segments
Nord Stream 2: Improvement of energy security in Europe

Nord Stream 2 pipeline project
- Natural gas pipeline from Russia to Europe across the Baltic Sea
- 55 bcm per year capacity
- Development starts in 2018 and is planned to finish by 2019
- Total project costs of EUR 9.5 bn
- Pipeline built by Nord Stream 2 AG, 100% owned by Gazprom
- In May 2017 Engie, OMV, Shell, Uniper and Wintershall signed financing agreements with Nord Stream 2 AG to provide long-term financing for up to 50% of the total cost of the project.

OMV agreement
- OMV agreed to provide long term financing for up to 10% (EUR 950 mn) of the total cost of the project; financed so far approx. EUR 405 mn
- Financing of 70% of project costs aimed to be raised from the capital market by Nord Stream 2 AG
Develop international Downstream Oil position

Export successful European model to growing markets

- Establish 1-2 core regions outside Europe; MoU with ADNOC
- Expand petrochemical position
- Grow refining capacity

Long term
Nearly double refining capacity

Acquisition budget until 2025, EUR bn
~5
The majority of demand growth driven by Asia

Development of fuels and petrochemicals demand 2016 to 2030
Mn t

- Growth in global oil demand >90% from Asia
- Growth in petrochemical demand ~70% from Asia

Source: JBC Energy, OMV analysis, rounded numbers

1 CIS & EE
Increase in demand triggers substantial capacity additions

Global refinery capacity vs. demand

- **Mn t p.a.**
- **Announced**
- **Gap**
- **2030**

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>200</th>
<th>250</th>
<th>5,400</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4,950</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **~25 x** Schwechat refinery
- **~450 Mn t p.a.** growth required to close the supply gap
- **Middle East and Asia**
- **In Europe and Americas only minor new builds**

Petrochemicals capacity vs. demand

- **Mn t p.a.**
- **Announced**
- **Gap**
- **2030**

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>145</th>
<th>155</th>
<th>880</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>580</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **~35 x** Borouge polymer capacity
- **300 Mn t p.a.** growth required to close the supply gap
- **Growth in Middle East is driven by further downstream integration**
- **Further petrochemical plants** will be located in Asia

---

1 Including products from use of natural gas liquids and biofuels supply
Source: JBC Energy, IEA, OMV analysis, rounded numbers, conversion factor mn bbl/d to mn t p.a. is 50

80 | Capital Market Story, June 2018
Strong oil demand required utilization rates above 80% in Asia, Middle East and Russia

<table>
<thead>
<tr>
<th>Region</th>
<th>2017</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>84%</td>
<td>73%</td>
</tr>
<tr>
<td>Russia</td>
<td>85%</td>
<td>88%</td>
</tr>
<tr>
<td>Middle East</td>
<td>73%</td>
<td>82%</td>
</tr>
<tr>
<td>Asia</td>
<td>82%</td>
<td>85%</td>
</tr>
<tr>
<td>Africa</td>
<td>61%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Refinery utilization rate
2017 - 2030

Standard refining margin
2017, USD/bbl

<table>
<thead>
<tr>
<th>Region</th>
<th>2017</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>4.9</td>
<td></td>
</tr>
<tr>
<td>Russia</td>
<td>&gt;5.3</td>
<td></td>
</tr>
<tr>
<td>Middle East</td>
<td>6.6</td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>n.a.</td>
<td></td>
</tr>
</tbody>
</table>

Source: JBC Energy and OMV analysis
1 Utilization calculated as crude throughput divided by refinery capacity
2 Premium to the refining margin as a result of the Russian export duty system

81  | Capital Market Story, June 2018
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Financial steering framework

Focus
- Strength of balance sheet and steady value enhancement
- Growth in profitability and adequate liquidity

KPIs
- ROACE/EVA
- Gearing
- Free cash flow after dividends
- Clean CCS net income/NOPAT

Principles
- Operational efficiency
- Capital efficiency
- Financing / cash efficiency
- Future oriented accretive portfolio management
- Comprehensive financial risk and compliance management

Value + Cash

Shareholder return and strong rating
Cost discipline remains an imperative

OMV’s cost discipline culture

- **Operational efficiency** in both Upstream and Downstream
- Capture **economies of scale** and strict management of **overhead costs**
- **Process optimization** and **harmonization**
- **Procurement** savings and contractor renegotiations
- Leverage **digitalization** and **optimize IT processes**

**New efficiency target**

2018 - 2020

\[ \geq 100 \] EUR mn

1 Based on Operating Cost versus 2017 baseline according to OMV definition on a comparable basis
Funding the growth – mid term perspective

Sources of cash
3 years cumulative, indicative based on
2017 Operating cash flow, EUR bn

Uses of cash
2018 - 2020, EUR bn

Sources of cash

- 3x 2017 Operating cash flow
- Gearing headroom
- Disposals and cost optimizations
- Cash contribution from M&A 2018 - 2020

Uses of cash

- Allocation optionality
  - M&A and resulting CAPEX
  - Dividends
  - Deleveraging
- CAPEX

---

1 2017 cash flow from operating activities adjusted for contribution from Yuzhno Russkoye
2 Based on net debt and assuming a gearing ratio of 30% at the end of 2017
3 Three years sources based on 2017
4 CAPEX excluding purchase price acquisition CAPEX and contingent considerations

86 | Capital Market Story, June 2018
Development of economic environment

Oil price Brent
USD/bbl

OMV indicator refining margin
USD/bbl

Gas prices
EUR/MWh

Ethylene/propylene net margin
EUR/t

Note: All figures are quarterly averages.
1 Converted to MWh using a standardized calorific value across the portfolio
2 Spread between market prices of ethylene/propylene and naphtha including standard processing consumption
## Financial performance overview

<table>
<thead>
<tr>
<th></th>
<th>3m/18</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean CCS Operating Result before depreciation</td>
<td>1,268</td>
<td>4,909</td>
<td>3,693</td>
<td>4,117</td>
<td>4,749</td>
<td>4,639</td>
</tr>
<tr>
<td>Clean CCS Operating Result</td>
<td>818</td>
<td>2,958</td>
<td>1,535</td>
<td>1,737</td>
<td>2,418</td>
<td>2,815</td>
</tr>
<tr>
<td>Clean CCS net income attributable to stockholders</td>
<td>377</td>
<td>1,624</td>
<td>995</td>
<td>1,148</td>
<td>1,132</td>
<td>1,112</td>
</tr>
<tr>
<td>Clean CCS EPS (in EUR)</td>
<td>1.15</td>
<td>4.97</td>
<td>3.05</td>
<td>3.52</td>
<td>3.47</td>
<td>3.41</td>
</tr>
<tr>
<td>Net debt</td>
<td>2,292</td>
<td>2,005</td>
<td>2,969</td>
<td>4,038</td>
<td>4,902</td>
<td>4,371</td>
</tr>
<tr>
<td>Gearing ratio (in %)</td>
<td>16</td>
<td>14</td>
<td>21</td>
<td>28</td>
<td>34</td>
<td>30</td>
</tr>
<tr>
<td>Cash flow from operating activities</td>
<td>1,076</td>
<td>3,448</td>
<td>2,878</td>
<td>2,834</td>
<td>3,666</td>
<td>4,124</td>
</tr>
<tr>
<td>Free cash flow before dividends</td>
<td>538</td>
<td>1,681</td>
<td>1,081</td>
<td>(39)</td>
<td>272</td>
<td>142</td>
</tr>
<tr>
<td>Free cash flow after dividends</td>
<td>538</td>
<td>1,013</td>
<td>615</td>
<td>(569)</td>
<td>(377)</td>
<td>(485)</td>
</tr>
<tr>
<td>CAPEX</td>
<td>339</td>
<td>3,376</td>
<td>1,878</td>
<td>2,769</td>
<td>3,832</td>
<td>5,239</td>
</tr>
<tr>
<td>Number of employees</td>
<td>20,595</td>
<td>20,721</td>
<td>22,544</td>
<td>24,124</td>
<td>25,501</td>
<td>26,863</td>
</tr>
</tbody>
</table>

1 Depreciation of at-equity result is included;
2 Adjusted for special items; clean CCS figures exclude fuels’ inventory holding gains/losses (CCS effects) resulting from the refineries and OMV Petrol Ofisi.
### Income statement summary

<table>
<thead>
<tr>
<th></th>
<th>3m/18</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating Result</td>
<td>899</td>
<td>1,732</td>
<td>(32)</td>
<td>(1,661)</td>
<td>1,149</td>
<td>2,772</td>
</tr>
<tr>
<td><strong>thereof</strong> Borealis</td>
<td>86</td>
<td>394</td>
<td>399</td>
<td>356</td>
<td>205</td>
<td>152</td>
</tr>
<tr>
<td>Net Financial Result</td>
<td>(90)</td>
<td>(246)</td>
<td>(198)</td>
<td>(248)</td>
<td>(357)</td>
<td>(481)</td>
</tr>
<tr>
<td>Taxes on income</td>
<td>(278)</td>
<td>(634)</td>
<td>47</td>
<td>654</td>
<td>(265)</td>
<td>(562)</td>
</tr>
<tr>
<td>Net income</td>
<td>531</td>
<td>853</td>
<td>(183)</td>
<td>(1,255)</td>
<td>527</td>
<td>1,729</td>
</tr>
<tr>
<td><strong>thereof</strong> attributable to non-controlling interests</td>
<td>101</td>
<td>315</td>
<td>118</td>
<td>(197)</td>
<td>211</td>
<td>528</td>
</tr>
<tr>
<td><strong>attributable to hybrid capital owners</strong></td>
<td>24</td>
<td>103</td>
<td>103</td>
<td>42</td>
<td>38</td>
<td>38</td>
</tr>
<tr>
<td><strong>attributable to stockholders</strong></td>
<td>406</td>
<td>435</td>
<td>(403)</td>
<td>(1,100)</td>
<td>278</td>
<td>1,162</td>
</tr>
<tr>
<td><strong>Clean CCS net income attributable to stockholders</strong></td>
<td>377</td>
<td>1,624</td>
<td>995</td>
<td>1,148</td>
<td>1,132</td>
<td>1,112</td>
</tr>
</tbody>
</table>

1 Adjusted for special items; clean CCS figures exclude fuels’ inventory holding gains/losses (CCS effects) resulting from the refineries and OMV Petrol Ofisi.

2 After deducting net income attributable to hybrid capital owners and net income attributable to non-controlling interests.
## Segments results

<table>
<thead>
<tr>
<th></th>
<th>3m/18</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
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<td>2,958</td>
<td>1,535</td>
<td>1,737</td>
<td>2,418</td>
<td>2,815</td>
</tr>
<tr>
<td><strong>Upstream</strong></td>
<td>438</td>
<td>1,225</td>
<td>40</td>
<td>117</td>
<td>1,641</td>
<td>2,098</td>
</tr>
<tr>
<td><strong>Downstream</strong></td>
<td>376</td>
<td>1,770</td>
<td>1,533</td>
<td>1,546</td>
<td>812</td>
<td>755</td>
</tr>
<tr>
<td><strong>Corporate and Other</strong></td>
<td>0</td>
<td>(16)</td>
<td>(50)</td>
<td>(43)</td>
<td>(48)</td>
<td>(46)</td>
</tr>
<tr>
<td><strong>Consolidation</strong></td>
<td>4</td>
<td>(21)</td>
<td>12</td>
<td>116</td>
<td>13</td>
<td>7</td>
</tr>
</tbody>
</table>

1 Adjusted for special items; clean CCS figures exclude fuels’ inventory holding gains/losses (CCS effects) resulting from the fuels refineries and OMV Petrol Ofisi
## Sensitivities of OMV Group in 2018

<table>
<thead>
<tr>
<th>Annual impact</th>
<th>Clean CCS Operating Result</th>
<th>Operating cash flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brent oil price (USD +1/bbl)</td>
<td>+45</td>
<td>+30</td>
</tr>
<tr>
<td>OMV realized gas price (EUR +1/MWh)</td>
<td>+125</td>
<td>+95</td>
</tr>
<tr>
<td>CEGH/NCG gas price ² (EUR +1/MWh)</td>
<td>+40</td>
<td>+35</td>
</tr>
<tr>
<td>OMV indicator refining margin (USD +1/bbl)</td>
<td>+105</td>
<td>+80</td>
</tr>
<tr>
<td>Ethylene/propylene net margin (EUR +10/t)</td>
<td>+15</td>
<td>+10</td>
</tr>
<tr>
<td>EUR-USD (USD appreciates by USD 0.01)</td>
<td>+20</td>
<td>+15</td>
</tr>
</tbody>
</table>

1 Excluding at-equity accounted investments  
2 CEGH/NCG sensitivity derived from sales in Austria, Norway and Russia (to the extent that sales prices are not linked to domestic Russian gas price)  
Materially different Brent and FX levels (vs. current levels) would lead to different sensitivity results.
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Net income</td>
<td></td>
<td>531</td>
<td>853</td>
<td>(183)</td>
<td>(1,255)</td>
<td>527</td>
<td>1,729</td>
</tr>
<tr>
<td>Depreciation, amortization and impairments incl. write-ups</td>
<td></td>
<td>450</td>
<td>1,941</td>
<td>3,784</td>
<td>5,153</td>
<td>3,165</td>
<td>2,289</td>
</tr>
<tr>
<td>Change in net working capital components</td>
<td></td>
<td>(122)</td>
<td>(424)</td>
<td>(148)</td>
<td>(400)</td>
<td>405</td>
<td>647</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>217</td>
<td>1,078</td>
<td>(575)</td>
<td>(664)</td>
<td>(431)</td>
<td>(541)</td>
</tr>
<tr>
<td><strong>Cash flow from operating activities</strong></td>
<td></td>
<td>1,076</td>
<td>3,448</td>
<td>2,878</td>
<td>2,834</td>
<td>3,666</td>
<td>4,124</td>
</tr>
<tr>
<td>Cash flow used for investments</td>
<td></td>
<td>(560)</td>
<td>(3,596)</td>
<td>(2,141)</td>
<td>(3,066)</td>
<td>(3,910)</td>
<td>(4,816)</td>
</tr>
<tr>
<td>Cash flow from disposals</td>
<td></td>
<td>22</td>
<td>1,830</td>
<td>344</td>
<td>193</td>
<td>516</td>
<td>835</td>
</tr>
<tr>
<td><strong>Free cash flow</strong></td>
<td></td>
<td>538</td>
<td>1,681</td>
<td>1,081</td>
<td>(39)</td>
<td>272</td>
<td>142</td>
</tr>
<tr>
<td>Dividends paid</td>
<td></td>
<td>0</td>
<td>(668)</td>
<td>(466)</td>
<td>(530)</td>
<td>(650)</td>
<td>(627)</td>
</tr>
<tr>
<td><strong>Free cash flow after dividends including non-controlling interest changes</strong></td>
<td></td>
<td>538</td>
<td>1,013</td>
<td>1,105</td>
<td>(581)</td>
<td>(401)</td>
<td>(619)</td>
</tr>
</tbody>
</table>
Strong financial footing

Net debt and gearing ratio
EUR bn

<table>
<thead>
<tr>
<th>Year</th>
<th>Net debt (EUR bn)</th>
<th>Gearing ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>4.0</td>
<td>28%</td>
</tr>
<tr>
<td>2016</td>
<td>3.0</td>
<td>21%</td>
</tr>
<tr>
<td>2017</td>
<td>2.0</td>
<td>14%</td>
</tr>
</tbody>
</table>

Cash position
EUR bn ¹
4.0

Target long-term gearing ratio
≤30%

Undrawn revolving credit facilities
EUR bn ¹
3.5

¹ As of end 2017
Balanced maturity profile

Maturity profile
EUR bn

Strong investment grade rating

- Moody's Investors Service: A3
  - Outlook stable
  - May 21, 2018

- Fitch Ratings: A-
  - Outlook stable
  - Feb 12, 2018

Financing costs

<table>
<thead>
<tr>
<th>Year</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2.76%</td>
</tr>
<tr>
<td>2017</td>
<td>2.45%</td>
</tr>
</tbody>
</table>

1 Weighted average interest rate of OMV Group’s long-term interest-bearing debt at year-end

Money market | Multilateral/Syndicated loans | Senior bond | Term loan

2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027ff

0.0 | 0.5 | 0.7 | 1.0 | 1.2 | 1.4 | 1.5 | 1.0 | 0.5 | 0.0
Diversified international shareholder base

Shareholder structure ¹

- Institutional investors: 26.7%
- Unidentified free float: 9.4%
- IPIC/Abu Dhabi: 31.5%
- Treasury shares: 22.7%
- Employee share programs: 6%

Geographical distribution of institutional investors ¹

- United States: 33%
- United Kingdom: 22%
- France: 17%
- Germany: 8%
- Austria: 6%
- Rest of Europe: 7%
- Rest of World: 6%
- United States: 33%
- United Kingdom: 22%
- France: 17%
- Germany: 8%
- Austria: 6%
- Rest of Europe: 7%
- Rest of World: 6%

¹ As of March 2018

327.3 mn shares

Institutional investors 26.7%
Sustainability
Growth strategy is implemented in a safe, responsible and carbon efficient manner

<table>
<thead>
<tr>
<th>Safety first</th>
<th>Carbon efficiency</th>
<th>Recognition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lost Time Injury Rate</td>
<td>Process safety events</td>
<td>Carbon intensity GHG emissions per unit</td>
</tr>
<tr>
<td>(23)% 2017 vs 2014</td>
<td>(74)% 2017 vs 2014</td>
<td>OMV Operations 2016 vs 2010</td>
</tr>
<tr>
<td>ZERO Harm NO Losses</td>
<td></td>
<td>External product sales 1 stable 2016 vs 2010</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(15)%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(2025) vs 2010</td>
</tr>
<tr>
<td></td>
<td>Zero routine flaring</td>
<td>Focus on natural gas</td>
</tr>
</tbody>
</table>

1 External sales volumes, excluding trading volumes. 2 Forecasted figures.
3 The inclusion of OMV as of October 13, 2017, in any MSCI index, and the use of MSCI logos, trademarks, service marks or index names herein, do not constitute a sponsorship, endorsement or promotion of OMV by MSCI or any of its affiliates. The MSCI indexes are the exclusive property of MSCI. MSCI and the MSCI index names and logos are trademarks or service marks of MSCI or its affiliates.
Sustainability at OMV

What Sustainability means for us

Sustainability for OMV means creating long-term value for our customers and shareholders by being innovative and an employer of choice.

We conduct our business in a responsible way, respecting the environment and adding value to the societies in which we operate.
# OMV Sustainability Strategy

## Focus Areas

<table>
<thead>
<tr>
<th>Health, Safety, Security and Environment</th>
<th>Commitments</th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ Health, safety, security and environmental protection have <strong>top priority</strong> in all activities</td>
<td></td>
</tr>
<tr>
<td>▶ HSSE vision of “ZERO harm - NO losses”</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Carbon Efficiency</th>
<th>Commitments</th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ Commitment to <strong>climate change mitigation</strong> and responsible resource management</td>
<td></td>
</tr>
<tr>
<td>▶ Measures to improve carbon efficiency of <strong>operations and product portfolio</strong></td>
<td></td>
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<thead>
<tr>
<th>Innovation</th>
<th>Commitments</th>
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<tbody>
<tr>
<td>▶ Focus on optimizing production, exploring high-end petrochemical solutions, developing innovative energy and embracing digital technologies</td>
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<tr>
<td>▶ <strong>Investment and partnerships</strong> in innovation, research and development</td>
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<tr>
<th>Employees</th>
<th>Commitments</th>
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<tr>
<td>▶ Building and retaining a talented and competent <strong>team</strong></td>
<td></td>
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<td>▶ Group <strong>diversity strategy</strong> with focus on gender and internationality</td>
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<tr>
<th>Business Principles and Social Responsibility</th>
<th>Commitments</th>
</tr>
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<tbody>
<tr>
<td>▶ <strong>High compliance standards</strong> at all locations</td>
<td></td>
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<tr>
<td>▶ Commitment to the <strong>UN Global Compact</strong>, the <strong>UN Guiding Principles on Business and Human Rights</strong> and the <strong>UN’s 2030 Agenda for Sustainable Development</strong></td>
<td></td>
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</tbody>
</table>
ESG \(^1\) performance

- OMV has in 2017 again achieved a score **A- (leadership)** for both CDP’s Climate Change and Water. This result places OMV among the top 13 companies in the global energy sector in CDP Climate Change.

- OMV was reconfirmed as a member of the **FTSE4Good Index Series**, which are used by a wide variety of market participants to create and assess responsible investment funds.

- OMV maintained its inclusion in the **STOXX® Global ESG Leaders**.

- OMV received the highest “**AAA**” score from MSCI Global Sustainability Index for the fifth time in a row of ESG performance. OMV was reconfirmed in the MSCI ACWI ESG Leaders index and included for the first time in the MSCI ACWI SRI Index.

- OMV remains a constituent of the **Euronext Vigeo - Eurozone 120** index, being among 120 companies that are most advanced in sustainability.

- OMV remains a constituent of the **Ethibel Sustainability Index (ESI) Excellence Europe**.

- OMV has been listed in the **"United Nations Global Compact 100"** since 2013.

- OMV was rated **C+ by oekom** based on the 2017 analysis, positioning the company among top 4 out of 148 companies in the energy sector.

- OMV is a constituent of **ECPI index** and scored EE-, stating as showing "a clear long-term strategic attitude, sound operational management practices and positive actions to tackle social and environmental needs".

\(^1\) Environment, Social and Governance.