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OMV – STRONG ASSET BASE

UPSTREAM

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

DOWNSTREAM OIL

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

DOWNSTREAM GAS

Positioned at the center of Europe’s transmission network
Long-term reliable partnerships with Europe’s major suppliers

428 kboe/d
Production, 6m/18

1.15 bn boe
Reserves, 2017

17.8 mn t
Total refining capacity

2.5 mn t
Total petchem capacity

113 TWh
Natural gas sales volume, 2017

31 TWh
Gas storage capacity

~2,000
filling stations in 10 countries
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
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
EUR bn

<table>
<thead>
<tr>
<th>Year</th>
<th>Upstream</th>
<th>Downstream</th>
<th>Corporate</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>99</td>
<td>3.3</td>
<td>99</td>
<td>3.3</td>
</tr>
<tr>
<td>2015</td>
<td>52</td>
<td>3.2</td>
<td>52</td>
<td>3.2</td>
</tr>
<tr>
<td>2016</td>
<td>44</td>
<td>3.0</td>
<td>44</td>
<td>3.0</td>
</tr>
<tr>
<td>2017</td>
<td>54</td>
<td>3.9</td>
<td>54</td>
<td>3.9</td>
</tr>
</tbody>
</table>

OMV Indicator refining margin, USD/bbl

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, September 2018
Upstream – High-quality portfolio

Focused portfolio

4+1 core and development regions

- CEE
- North Sea
- MEA
- Russia

Production
6m/18 split by region, kboe/d

- CEE
- MEA
- Australasia
- North Sea

Low production cost
USD/boe

2016: 10.6
2017: 8.8
6m/18: 7.5
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>2016</th>
<th>Target</th>
<th>Delivered</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2017</th>
<th>Target</th>
<th>Delivered</th>
</tr>
</thead>
<tbody>
<tr>
<td>200</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CAPEX ³
EUR bn

| 2015 | 2.8 |
| 2016 | 1.9 |
| 2017 | 1.7 |

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>EPS (EUR)</th>
<th>Oil price (USD/bbl)</th>
<th>OMV Indicator refining margin (USD/bbl)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>1.1</td>
<td>52</td>
<td>7.2</td>
</tr>
<tr>
<td>2016</td>
<td>1.0</td>
<td>44</td>
<td>4.7</td>
</tr>
<tr>
<td>2017</td>
<td>1.6</td>
<td>54</td>
<td>6.0</td>
</tr>
</tbody>
</table>

Clean CCS EPS
2017, EUR: 4.97
2015, EUR: 3.52
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
  - Reserve Replacement Rate \(^1\)
  - 100%
  - 4+1 core regions

Production cost, USD/boe

Production volumes, kboe/d

- 3 years average

1 Capital Market Story, September 2018
Downstream Oil – Further strengthen European position and grow internationally

- 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

1st quartile

Solomon benchmarking: for Schwechat and Burghausen refineries

Capital Market Story - September 2018
Downstream Gas – Build strong market presence in Europe

► 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

>80% gas to be imported by 2030

380 bcm imports required

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-accretive **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
\[ \geq 12\% \]
Mid- and long-term
Focused investments

- Efficient capital allocation
- Strict cost management

CAPEX
EUR bn

- 2015-2017 Ø p.a. 2.1
- 2018-2025 Ø p.a. 2.0 - 2.5

Acquisitions
EUR bn

- 2015-2017 1.8
- 2018-2025 10

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

Downstream
8 years
3 years

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

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

ROACE \( \geq 12\% \)

Strategic fit

- Cash profile
- Return profile

- Defined investment hurdles considering
  - business risks
  - country risks
  - technology risks
- Value accretive
Strong track record in portfolio management

- **Signed basic agreement on asset swap with Gazprom**
  - Jan 2017

- **Acquired share in Yuzhno Russkoye**
  - June 2017

- **Expanded footprint in New Zealand**
  - March 2018

- **OMV awarded 20% share in two oil fields in Abu Dhabi**
  - June 2018

- **Entered into exclusive negotiations for a 50% stake in Malaysian Sapura Upstream**
  - Sep 2018

- **Disposed CAPEX intensive Upstream**
  - Dec 2016

- **OMV Petrol UK business**
  - Jan 2017

- **Divested Upstream**
  - June 2017

- **Divested OMV Petrol Ofisi Pakistan Upstream business**
  - Nov 2017

- **Signed divestment of stake in North Sea infrastructure**
  - Mar 2018

- **Closed divestment of Samsun power plant in Turkey**
  - Apr 2018

- **Selected M&A projects:**
  - Polarled gas pipeline and the Nyhamna gas processing plant

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23 | Capital Market Story, September 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
Abu Dhabi – high-quality assets with substantial cash generation

| Adding 450 mn bbl to OMV’s reserve base | Substantially strengthening OMV’s reserves base  
|  | Upside potential from satellite fields |
| ≥ 40 kbbi/d long-term plateau production (net to OMV) | Plateau production to be reached early in the next decade  
|  | Long-term plateau |
| Substantial free cash flow | Long-term stable and substantial free cash flow  
|  | Annual CAPEX of ~USD 150 mn in the first 5 years |
| Strengthening partnerships | Strengthening strategic partnership with ADNOC  
|  | Build material position in one of the world’s richest region in hydrocarbons |
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>OMV</td>
<td>61%</td>
<td>39%</td>
<td>18%</td>
</tr>
<tr>
<td>Peers¹</td>
<td>20%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>ATX²</td>
<td>34%</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>FTSEUR1ST 300 OIL &amp; GAS²</td>
<td>6%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>FTSE EUROTOP 100²</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 (now Equinor), 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

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

2017 position
- **348 kboe/d production** (6m/18: 428 kboe/d) with an oil and gas split of 52:48
- **Production cost at USD 8.8/boe** (6m/18: USD 7.5/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 major players in hydrocarbon-rich regions

1 Divested in June 2018
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>

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.

Clean Operating Result
EUR mn

<table>
<thead>
<tr>
<th>Quarter</th>
<th>6m/17</th>
<th>6m/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>580</td>
<td>895</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Oil price, USD/bbl</th>
</tr>
</thead>
<tbody>
<tr>
<td>52</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Oil price, USD/bbl</th>
</tr>
</thead>
<tbody>
<tr>
<td>44</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Oil price, USD/bbl</th>
</tr>
</thead>
<tbody>
<tr>
<td>54</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Oil price, USD/bbl</th>
</tr>
</thead>
<tbody>
<tr>
<td>71</td>
</tr>
</tbody>
</table>
Strengthened reserve base

1P Reserves
Mn boe

<table>
<thead>
<tr>
<th>Year</th>
<th>Australasia</th>
<th>MEA</th>
<th>North Sea</th>
<th>Russia</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>1,028</td>
<td>186</td>
<td>110</td>
<td>194</td>
</tr>
<tr>
<td>2016</td>
<td>1,030</td>
<td>15</td>
<td>116</td>
<td>70</td>
</tr>
<tr>
<td>2017</td>
<td>1,146</td>
<td>641</td>
<td>73</td>
<td>77</td>
</tr>
</tbody>
</table>

Reserve Replacement Rate
3 years Ø RRR, %

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>73</td>
<td>70</td>
<td>77</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>58</td>
<td>17</td>
<td>10</td>
</tr>
</tbody>
</table>

1 Source: IHS Markit (Anadarko, Apache, BP, ENI, Equinor, Hess Corp, Lukoil, Murphy, Occidental, Repsol, Shell, 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>Acquisitions</th>
<th>Organic growth</th>
<th>Asset base</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>&gt;420</td>
<td></td>
<td>348</td>
</tr>
<tr>
<td>2018</td>
<td>&gt;420</td>
<td></td>
<td>500</td>
</tr>
<tr>
<td>2020</td>
<td>500</td>
<td></td>
<td>&gt;420</td>
</tr>
<tr>
<td>2025</td>
<td>600</td>
<td></td>
<td>348</td>
</tr>
</tbody>
</table>

1 Excluding acquisitions and divestments

Production cost both in 2020 and 2025 USD/boe <8

<extraction>一带注释的图像，包括条形图和柱状图，显示了生产增长、并购和有机增长的预期。2017年的生产增长为348 Kboe/d，2018年为420 Kboe/d。预计2020年增长到500 Kboe/d，到2025年进一步增长到600 Kboe/d。并购和有机增长包括Neptun、Nawara和Aasta Hansteen。2020年和2025年的生产成本均预计不超过8美元/桶油当量。这些增长和成本预测分别于2020年和2025年达到。
</extraction>
Ensure sustainable reserve replenishment

1P Reserve development
Bn boe

<table>
<thead>
<tr>
<th>Year</th>
<th>1P Reserve</th>
<th>Reserve life</th>
<th>Reserve Replacement Rate</th>
<th>Gas share</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>1.1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2025</td>
<td>&gt;2.0</td>
<td>8-10</td>
<td>&gt;100</td>
<td>&gt;50</td>
</tr>
</tbody>
</table>

2x
Exploration: Faster and more disciplined approach

Excellent Barents Sea track record

- Active in Austria, Romania deep onshore, Black Sea, Norway and New Zealand
- Increase size and quality of E&A portfolio
- 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
  - Success in Norwegian Hades and Iris exploration well with discovery of gas and condensate in April 2018

1st well as new play opener ✔
Successful appraisal campaign ✔
World-record drilling ✔

E&A budget
EUR mn p.a.¹
300

Wells
p.a.
15-20

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

---

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

---

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
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 Upstream business in Pakistan divested in 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

---

**Presence in CEE**

- **Austria**
- **Romania**
- **Bulgaria**

**Production split 6m/18 Kboe/d**

- Romania: 188 Kboe/d
- Austria: 7 Kboe/d
- Kazakhstan: 27 Kboe/d

**Main exploration and development projects**

- Neptun Deep
- Han Asparuh

**Main producing assets**

- Komsomolskoye
- Turkmenoi
- Tasbulat Aktas

**Exploration and appraisal**

- Matzen

---

All figures net to OMV

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

Capital Market Story, September 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** aimed for second half of 2018

---

1 OMV Petrom initial estimation, as communicated in February 2012.
2 Gross value
3 If commercially viable
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 ¹
  - 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**

---

¹ As per operator
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’s share of Achimov’s IV/V production development

- **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

- **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

- 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
  - 43 licenses, thereof 8 operated
  - Hades and Iris discoveries in the Norwegian Sea (20-115 mn recoverable boe respectively 20-130 mn recoverable boe) in April 2018

All figures net to OMV

1 Status as of June 30, 2018
Platform successfully anchored – Aasta Hansteen, Norwegian Sea, Norway

**Aasta Hansteen field – Project Phase: Execution**

- **Licensees:** Equinor (Operator, 51%), Wintershall (24%), OMV (15%), ConocoPhillips (10%)
- **Cumulative production of dry gas (from three discoveries)**: ~43 mn boe
- **Production start:** expected in Q4 2018
- **Peak production**: ~18 kboe/d
- Deep water development with first floating Spar platform in Norway and the largest in the world
- **Status:** Hook-up and commissioning activities commenced
- 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.
3 Signed divestment
OMV’s oil discovery – Wisting, Barents Sea, Norway

Wisting, Norway – Project Phase: Appraisal

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

- Estimated 50-130 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 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

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 closed in June 2018

All figures net to OMV

1 KRI – Kurdistan Region of Iraq
2 Divested in June 2018
Abu Dhabi – High-quality assets with substantial cash generation

► OMV was awarded a 20% stake in two ADNOC offshore oil fields:
  ► **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), start of production expected by end of 2018
► 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

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 (~95% complete): impacted by social and political unrest in Tataouine; working on solutions to minimize impact on delivery of first gas

- Gas Treatment Plant: 97%
- Central Processing Facility: 89%
- Pipeline: 96%

---

1 All figures net to OMV

Project progress status as of March 31, 2018

Nawara gas treatment plant, Tunisia
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 expected to be completed in 2018
Acquisition in New Zealand – Major step towards building Australasia into 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

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

- New ventures
  - MEA
  - SEA

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

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

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

¹ Early production
² Basic agreement signed on December 14, 2016
### Major projects

<table>
<thead>
<tr>
<th>Development &amp; Execution</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project</strong></td>
<td><strong>Country</strong></td>
</tr>
<tr>
<td>Aasta Hansteen</td>
<td>Norway</td>
</tr>
<tr>
<td>Nawara</td>
<td>UAE</td>
</tr>
<tr>
<td>Achimov IV/V (^2)</td>
<td>Russia</td>
</tr>
</tbody>
</table>

### Appraisal

|  |
|-------------------------|---|
| **Project** | **Country** | **Type** | **Production start year** | **Cumulative production \(^1\) mn boe** | **Working interest %** | **Operated** |
| Neptun Deep | Romania | Gas | post 2020 | 125-250 \(^3\) | 50.0 \(^4\) | no |
| Wisting | Norway | Oil | post 2020 | up to 130 | 25.0 | by OMV |

---

\(^1\) All figures net to OMV  
\(^2\) Basic agreement signed on December 14, 2016  
\(^3\) As communicated for the Domino-1 well in February 2012  
\(^4\) Via OMV Petrom  

---

57 | Capital Market Story, September 2018
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
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**

---

\(^1\) 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 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: 16.0 mn t
  - (90% utilization rate of 17.8 mt refining capacity)
- Purchase of semifinished products: 1.5 mn t
- Purchase of finished products: 4.0 mn t

**Product supply and logistics**
- 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 %*
- Wholesale: 53%
- Captive market: 47%

---

1. 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
- ~2.7 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

1 In May 2018, OMV signed an agreement to divest the Samsun power plant; the transaction is expected to close by the end of 2018 at the latest.
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 pipeline transportation (Gas Connect Austria) 1,499 TWh
Gas storage volume sold 16 TWh

Gas logistics business (including transit gas)

Gas sales to third parties 113 TWh
Sales in Europe¹ 57 TWh
Sales in Romania 45 TWh
Sales in Turkey 11 TWh

¹ Excluding Romania

Internal consumption and balancing

Gas supply
Gas logistics
Gas marketing sales
Best in class refinery utilization rate and stable sales

Refined product sales (mn t)

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>30.0</td>
<td>30.7</td>
<td>23.8</td>
</tr>
</tbody>
</table>

OMV Petrol Ofisi divested in June 2017

Refinery utilization rate (%)

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate</td>
<td>93</td>
<td>89</td>
<td>90</td>
</tr>
</tbody>
</table>

Retail sales (mn t)

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>10.3</td>
<td>10.4</td>
<td>8.1</td>
</tr>
</tbody>
</table>

OMV Petrol Ofisi divested in June 2017

Natural gas sales (TWh)

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>110</td>
<td>109</td>
<td>113</td>
</tr>
</tbody>
</table>
**Strong contributor to OMV Group financials**

**Improvement in operations**
Clean CCS Operating Result, EUR bn

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

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>1.5</td>
<td>1.5</td>
<td>1.8</td>
</tr>
</tbody>
</table>

**Strong cash flow generator**
Free cash flow, EUR bn

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>0.8</td>
<td>1.3</td>
<td>1.7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>0.7</td>
<td>1.1</td>
<td>0.7</td>
</tr>
</tbody>
</table>

**Attractive returns**

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>9.2</td>
<td>8.8</td>
<td>7.9</td>
</tr>
</tbody>
</table>

---

1 Including 324 mn EUR cash flow for investments in Nord Stream 2 in 2017

2 Clean CCS Return On Net Assets = Clean CCS NOPAT divided by average net assets, expressed as a percentage

---

_refining Margin, USD/bbl_
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>Petrochemicals</td>
<td></td>
</tr>
<tr>
<td>Fuels – Jet</td>
<td></td>
</tr>
<tr>
<td>Fuels – Gasoline &amp; Diesel</td>
<td></td>
</tr>
<tr>
<td>Heavy Products</td>
<td></td>
</tr>
<tr>
<td>Change</td>
<td>2025 volumes</td>
</tr>
<tr>
<td>2016</td>
<td>2025</td>
</tr>
<tr>
<td>Up to EUR ~ 1 bn planned investments for upgrades in 2018 - 2025</td>
<td></td>
</tr>
<tr>
<td>Increase production of petrochemicals</td>
<td></td>
</tr>
<tr>
<td>Maximize jet fuel production and leverage the direct pipeline connection to Vienna and Munich airports</td>
<td></td>
</tr>
<tr>
<td>Become heavy fuel oil free in Western refineries</td>
<td></td>
</tr>
<tr>
<td>Upgrade to higher value products in Petrobrazi refinery</td>
<td></td>
</tr>
<tr>
<td>Stable total refining capacity of 17.8 mn t</td>
<td></td>
</tr>
</tbody>
</table>
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

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

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
Retail ambitions for the future

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

Highly efficient retail stations
Average throughput per station, mn liters

- 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

Strong petrochemicals position in Europe and potential for future growth

Production capacity
Mn t p.a.

- 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

Clean CCS Operating Result petrochemicals
EUR mn

- 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

**Refineries**

- **Equity crude oil processed**
  - Peers: 9%
  - OMV 2017: 25%
  - OMV 2025: 21%

- **Petrochemical sales volume**
  - Peers: 7%
  - OMV 2017: 12%
  - OMV 2025: 15%

**Sales**

- **Retail sales volume**
  - % of refining capacity
  - Peers: 25%
  - OMV 2017: 35%
  - OMV 2025: 40%

- **Captive sales outlets**
  - %
  - Peers: 32%
  - OMV 2017: 47%
  - OMV 2025: 55%

OMV – top refinery utilization in Europe

≥ 90%

OMV in 2017 excluding OMV Petrol Ofisi

Capital Market Story, September 2018
Europe needs more natural gas

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

- Increasing European import demand supported by the switch from coal to gas
- Declining European indigenous production requires further gas import volumes

Source: IEA 2017, OMV analysis
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 465 mn
- Financing of 70% of project costs aimed to be raised from the capital market by Nord Stream 2 AG
### OMV – innovation for future markets

<table>
<thead>
<tr>
<th>Alternative energies</th>
<th>Electric</th>
<th>Mobility</th>
<th>Gas</th>
<th>Recycling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assets</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>25</td>
<td>56</td>
<td>800 t p.a.</td>
</tr>
<tr>
<td>EV charging stations in OMV stations</td>
<td>10</td>
<td>10</td>
<td></td>
<td>1 Pilot plant in Austria</td>
</tr>
<tr>
<td>Ambition</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scaling</td>
<td>Frequency</td>
<td>Profitability</td>
<td>Scaling</td>
<td></td>
</tr>
</tbody>
</table>
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

1 CIS & EE
Source: JBC Energy, OMV analysis, rounded numbers
Increase in demand triggers substantial capacity additions

Global refinery capacity vs. demand

- **Mn t p.a.**
  - 2016: 4,950
  - Announced: 200
  - Gap: 250
  - 2030: 5,400

- ~25x
  - Schwedchat refinery

- **Global Oil Demand, Mn t p.a.**
  - 2016: 4,800
  - 2030: 5,250

- 450 Mn t p.a. growth required to close the supply gap
- Main capacity additions will be located in the Middle East and Asia
- In Europe and Americas only minor new builds

Petrochemicals capacity vs. demand

- **Mn t p.a.**
  - 2016: 580
  - Announced: 145
  - Gap: 155
  - 2030: 880

- ~35x
  - Borouge polymer capacity

- **Global PETchem Demand, Mn t p.a.**
  - 2016: 435
  - 2030: 740

- 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
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 1
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></td>
<td>&gt;5.3</td>
</tr>
<tr>
<td>Middle East</td>
<td>6.6</td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td></td>
<td>n.a.</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

Average refinery utilization >80%
Average refinery utilization <80%
Financial steering framework

Shareholder return and strong rating

Value + Cash

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
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

EUR mn ≥100

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
- Cash contribution from M&A 2018 - 2020

Uses of cash:

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

Notes:

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, September 2018
Development of economic environment

Oil prices
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>6m/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(^1,(^2)</td>
<td>2,433</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(^2)</td>
<td>1,544</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(^2)</td>
<td>649</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)(^2)</td>
<td>1.99</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>2,848</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>20</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>2,309</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>152</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>(541)</td>
<td>1,013</td>
<td>615</td>
<td>(569)</td>
<td>(377)</td>
<td>(485)</td>
</tr>
<tr>
<td>CAPEX</td>
<td>2,086</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>20,086</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>in EUR mn</th>
<th>6m/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>1,502</td>
<td>1,732</td>
<td>(32)</td>
<td>(1,661)</td>
<td>1,149</td>
<td>2,772</td>
</tr>
<tr>
<td>thereof Borealis</td>
<td>192</td>
<td>394</td>
<td>399</td>
<td>356</td>
<td>205</td>
<td>152</td>
</tr>
<tr>
<td>Net Financial Result</td>
<td>(137)</td>
<td>(246)</td>
<td>(198)</td>
<td>(248)</td>
<td>(357)</td>
<td>(481)</td>
</tr>
<tr>
<td>Taxes on income</td>
<td>(557)</td>
<td>(634)</td>
<td>47</td>
<td>654</td>
<td>(265)</td>
<td>(562)</td>
</tr>
<tr>
<td>Net income</td>
<td>807</td>
<td>853</td>
<td>(183)</td>
<td>(1,255)</td>
<td>527</td>
<td>1,729</td>
</tr>
<tr>
<td>thereof attributable to non-controlling interests</td>
<td>157</td>
<td>315</td>
<td>118</td>
<td>(197)</td>
<td>211</td>
<td>528</td>
</tr>
<tr>
<td>attributable to hybrid capital owners</td>
<td>40</td>
<td>103</td>
<td>103</td>
<td>42</td>
<td>38</td>
<td>38</td>
</tr>
<tr>
<td>attributable to stockholders</td>
<td>610</td>
<td>435</td>
<td>(403)</td>
<td>(1,100)</td>
<td>278</td>
<td>1,162</td>
</tr>
<tr>
<td>Clean CCS net income attributable to stockholders(^1,2)</td>
<td>649</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>6m/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 ¹</td>
<td>1,544</td>
<td>2,958</td>
<td>1,535</td>
<td>1,737</td>
<td>2,418</td>
<td>2,815</td>
</tr>
<tr>
<td>Upstream</td>
<td>895</td>
<td>1,225</td>
<td>40</td>
<td>117</td>
<td>1,641</td>
<td>2,098</td>
</tr>
<tr>
<td>Downstream</td>
<td>714</td>
<td>1,770</td>
<td>1,533</td>
<td>1,546</td>
<td>812</td>
<td>755</td>
</tr>
<tr>
<td>Corporate and Other</td>
<td>(6)</td>
<td>(16)</td>
<td>(50)</td>
<td>(43)</td>
<td>(48)</td>
<td>(46)</td>
</tr>
<tr>
<td>Consolidation</td>
<td>(60)</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
### Cash flow

<table>
<thead>
<tr>
<th>in EUR mn</th>
<th>6m/18</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>807</td>
<td>853</td>
<td>(183)</td>
<td>(1,255)</td>
<td>527</td>
<td>1,729</td>
</tr>
<tr>
<td><strong>Depreciation, amortization and impairments incl. write-ups</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>932</td>
<td>1,941</td>
<td>3,784</td>
<td>5,153</td>
<td>3,165</td>
<td>2,289</td>
</tr>
<tr>
<td><strong>Change in net working capital components</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>279</td>
<td>(424)</td>
<td>(148)</td>
<td>(400)</td>
<td>405</td>
<td>647</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>291</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></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2,309</td>
<td>3,448</td>
<td>2,878</td>
<td>2,834</td>
<td>3,666</td>
<td>4,124</td>
</tr>
<tr>
<td><strong>Cash flow used for investments</strong></td>
<td></td>
<td>(2,323)</td>
<td>(3,596)</td>
<td>(2,141)</td>
<td>(3,066)</td>
<td>(3,910)</td>
</tr>
<tr>
<td><strong>Cash flow from disposals</strong></td>
<td></td>
<td>166</td>
<td>1,830</td>
<td>344</td>
<td>193</td>
<td>516</td>
</tr>
<tr>
<td><strong>Free cash flow</strong></td>
<td></td>
<td>152</td>
<td>1,681</td>
<td>1,081</td>
<td>(39)</td>
<td>272</td>
</tr>
<tr>
<td><strong>Dividends paid</strong></td>
<td></td>
<td>(693)</td>
<td>(668)</td>
<td>(466)</td>
<td>(530)</td>
<td>(650)</td>
</tr>
<tr>
<td><strong>Free cash flow after dividends including non-controlling interest changes</strong></td>
<td></td>
<td>(541)</td>
<td>1,013</td>
<td>1,105</td>
<td>(581)</td>
<td>(401)</td>
</tr>
</tbody>
</table>
## Strong financial footing

### Net debt and gearing ratio

<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

<table>
<thead>
<tr>
<th>Target long-term gearing ratio (≤30%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.0 EUR bn</td>
</tr>
</tbody>
</table>

### Undrawn revolving credit facilities

<table>
<thead>
<tr>
<th>As of end 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.5 EUR bn</td>
</tr>
</tbody>
</table>
Balanced maturity profile

Maturity profile

EUR bn

<table>
<thead>
<tr>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
<th>2026</th>
<th>2027ff</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.75</td>
<td>0.50</td>
<td>0.40</td>
<td>0.50</td>
<td>0.60</td>
<td>0.70</td>
<td>0.80</td>
<td>1.00</td>
<td>1.20</td>
<td>1.20</td>
</tr>
</tbody>
</table>

1 As of end of 2017

Strong investment grade rating

- **Moody’s Investors Service**
  - A3
  - Outlook stable
  - May 21, 2018

- **Fitch Ratings**
  - A-
  - Outlook stable
  - June 7, 2018

Financing costs

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

2 Weighted average interest rate of OMV Group’s long-term interest-bearing debt at year-end
## Funding activities of the last years

<table>
<thead>
<tr>
<th>Date of issue</th>
<th>Bond ¹</th>
<th>Amount in EUR mn</th>
<th>Coupon in %</th>
<th>Maturity</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2014</td>
<td>Eurobond (XS1138423774)</td>
<td>750</td>
<td>0.60 fix</td>
<td>11/19/2018</td>
</tr>
<tr>
<td>November 2013</td>
<td>Eurobond (XS0996734868)</td>
<td>500</td>
<td>1.75 fix</td>
<td>11/25/2019</td>
</tr>
<tr>
<td>February 2010</td>
<td>Eurobond (XS0485316102)</td>
<td>500</td>
<td>4.375 fix</td>
<td>02/10/2020</td>
</tr>
<tr>
<td>October 2011</td>
<td>Eurobond (XS0690406243)</td>
<td>500</td>
<td>4.25 fix</td>
<td>10/12/2021</td>
</tr>
<tr>
<td>September 2012</td>
<td>Eurobond (XS0834367863)</td>
<td>750</td>
<td>2.625 fix</td>
<td>09/27/2022</td>
</tr>
<tr>
<td>December 2017</td>
<td>Eurobond (XS1734689620)</td>
<td>1,000</td>
<td>1.00 fix</td>
<td>12/14/2026</td>
</tr>
<tr>
<td>September 2012</td>
<td>Eurobond (XS0834371469)</td>
<td>750</td>
<td>3.50 fix</td>
<td>09/27/2027</td>
</tr>
<tr>
<td>December 2015</td>
<td>Hybrid bond (XS1294342792)</td>
<td>750</td>
<td>5.25 fix</td>
<td>Perp-NC6</td>
</tr>
<tr>
<td>June 2018</td>
<td>Hybrid bond (XS1713462403)</td>
<td>500</td>
<td>2.875 fix</td>
<td>Perp-NC6</td>
</tr>
<tr>
<td>December 2015</td>
<td>Hybrid bond (XS1294343337)</td>
<td>750</td>
<td>6.25 fix</td>
<td>Perp-NC10</td>
</tr>
</tbody>
</table>

¹ As of end of June, 2018

---

As of end of June, 2018
Diversified international shareholder base

Shareholder structure
- 327.3 mn shares
- Institutional investors: 27.0%
- ÖBIB: 9.5%
- IPIC/Abu Dhabi: 24.9%
- Unidentified free float: 6.5%
- Employee share programs: 0.3%
- Treasury shares: 0.2%
- Treasury shares: 0.2%
- Employee share programs: 0.3%
- Unidentified free float: 6.5%
- IPIC/Abu Dhabi: 24.9%
- ÖBIB: 9.5%

Geographical distribution of institutional investors
- United States: 16%
- United Kingdom: 22%
- France: 8%
- Germany: 8%
- Austria: 8%
- Rest of Europe: 34%
- Rest of World: 22%

1 As of end of June 2018
# Sensitivities of OMV Group in 2018

<table>
<thead>
<tr>
<th>Annual impact ¹</th>
<th>Clean CCS Operating Result ²</th>
<th>Operating cash flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>in EUR mn</td>
<td></td>
<td></td>
</tr>
<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 ³ (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 hedging

² Excluding at-equity accounted investments

³ 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.
Sustainability
Growth strategy is implemented in a safe, responsible and carbon efficient manner

**Safety first**
- **Lost Time Injury Rate**
  - 2017 vs 2014:
    - (23)%
  - 2017 vs 2014:
    - (74)%

**Carbon efficiency**
- **Carbon intensity**
  - GHG emissions per unit
  - **OMV Operations**
    - 2016 vs 2010:
      - (15)%
  - **External product sales**
    - 2016 vs 2010:
      - stable

**Recognition**
- **ZERO Harm NO Losses**
- **Recognition**
  - FTSE4Good
  - MSCI:
    - 2017 Constituent MSCI ESG Leaders Indexes
  - Highest ranking for ESG performance from MSCI for the last six years

---

1. External sales volumes, excluding trading volumes.
2. Forecasted figures.
3. The inclusion of OMV as of July 2018, 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.

Where we concentrate our efforts

1. Employees
2. HSSE
3. Innovation
4. Carbon Efficiency
5. Business Principles & Social Responsibility
## OMV’s Sustainability Focus Areas

<table>
<thead>
<tr>
<th>Focus Areas</th>
<th>Commitments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health, Safety, Security and Environment</td>
<td>- Health, safety, security and environmental protection have <strong>top priority</strong> in all activities</td>
</tr>
<tr>
<td></td>
<td>- HSSE vision of “ZERO harm - NO losses”</td>
</tr>
<tr>
<td>Carbon Efficiency</td>
<td>- Commitment to <strong>climate change mitigation</strong> and responsible resource management</td>
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<td></td>
<td>- Measures to improve carbon efficiency of <strong>operations and product portfolio</strong></td>
</tr>
<tr>
<td>Innovation</td>
<td>- <strong>Focus</strong> on optimizing production, exploring high-end petrochemical solutions, developing innovative energy and embracing digital technologies</td>
</tr>
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<td>- <strong>Investment and partnerships</strong> in innovation, research and development</td>
</tr>
<tr>
<td>Employees</td>
<td>- <strong>Building and retaining</strong> a talented and competent <strong>team</strong></td>
</tr>
<tr>
<td></td>
<td>- Group <strong>diversity strategy</strong> with focus on gender and internationality</td>
</tr>
<tr>
<td>Business Principles and Social Responsibility</td>
<td>- <strong>High compliance standards</strong> at all locations</td>
</tr>
<tr>
<td></td>
<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>
</tr>
</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 sixth 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.
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