



OMV CAPITAL MARKET STORY

May 2018

OMV Aktiengesellschaft

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OMV – STRONG ASSET BASE

437 kboe/d
Production, 3m/18

1.15 bn boe
Reserves, 2017



UPSTREAM

4+1 core and development regions

- ▶ CEE
 - ▶ North Sea
 - ▶ MEA
 - ▶ Russia
- Australasia**

17.8 mn t
Total refining capacity

2.5 mn t
Total petchem capacity



DOWNSTREAM OIL

3 refineries in Austria, Germany, Romania

36% participation in **Borealis**

~2,000 filling stations in 10 countries

113 TWh
Natural gas sales volume, 2017

30 TWh
Gas storage capacity

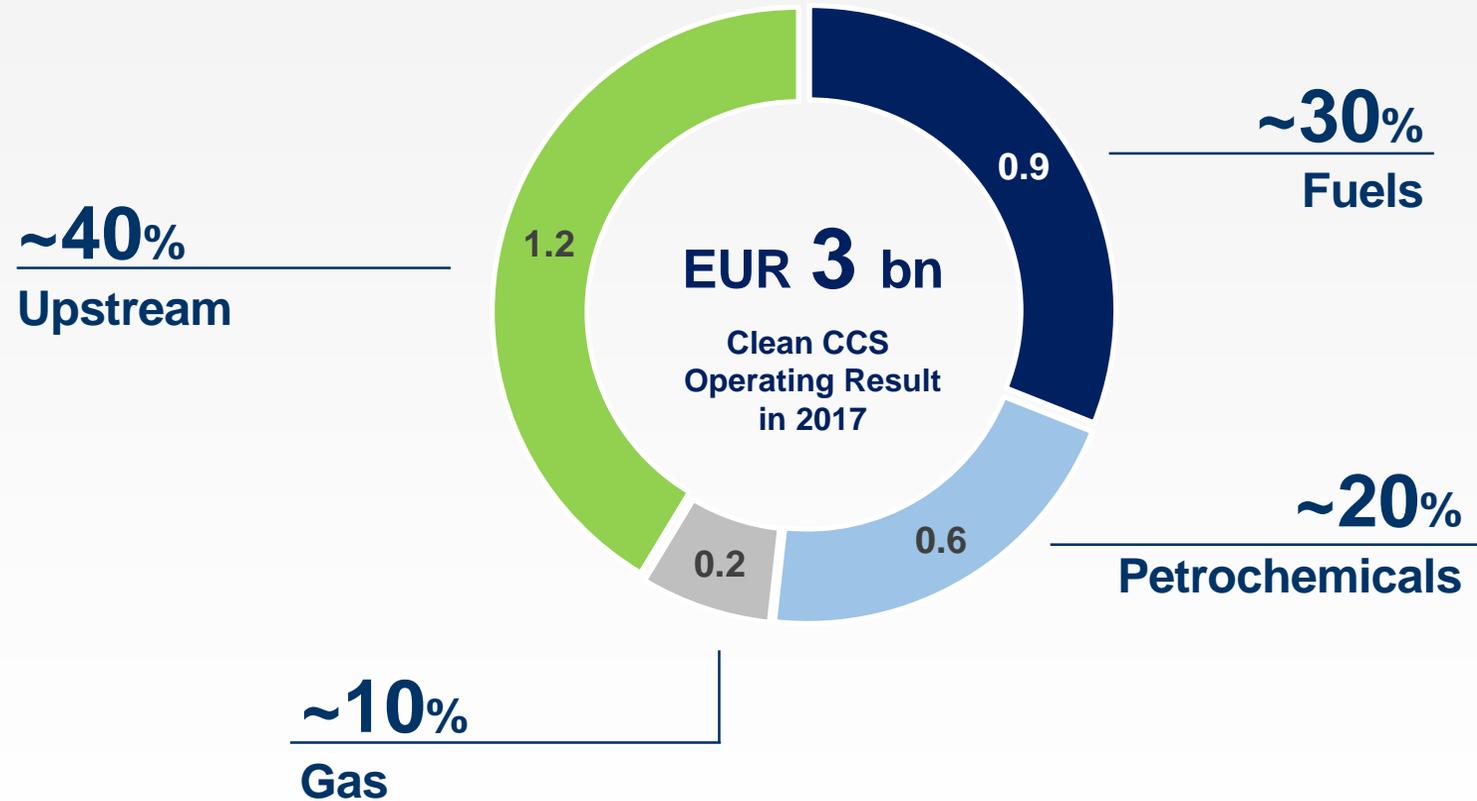


DOWNSTREAM GAS

Positioned at the **center of Europe's** transmission network

Long-term reliable **partnerships** with Europe's major suppliers

OMV – INTEGRATED OIL & GAS



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**



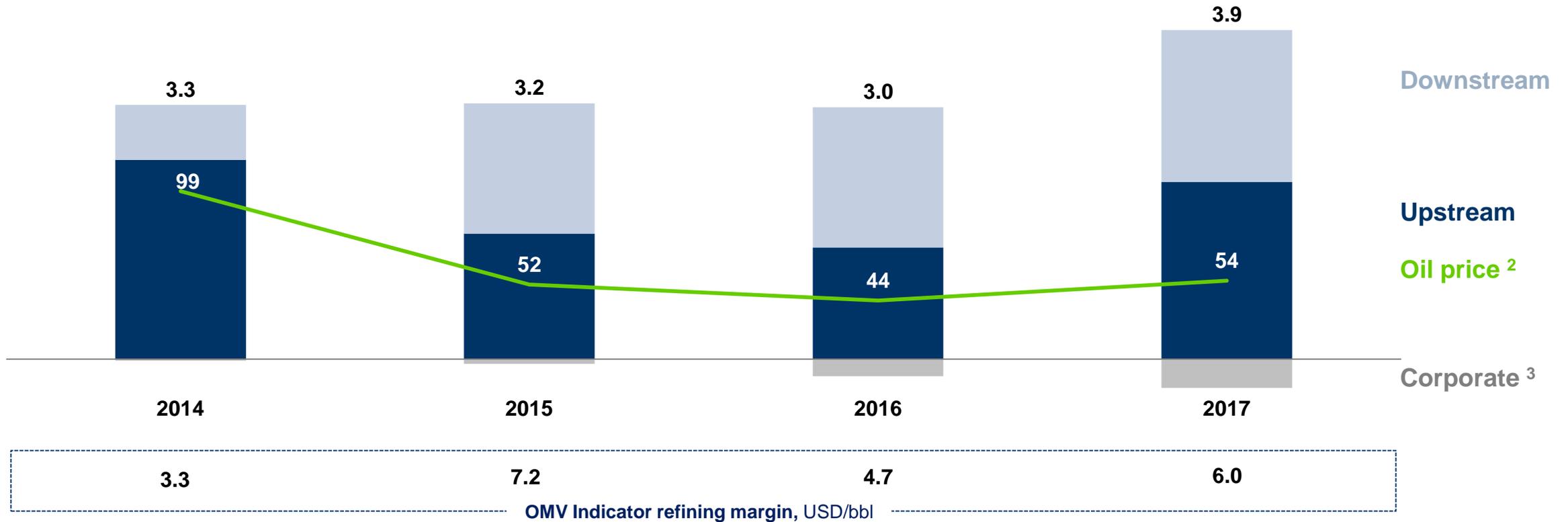
▶ **Well positioned for long-term growth** in attractive regions through strong partnerships



▶ **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 ¹
EUR bn



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

Upstream – High-quality portfolio

Focused portfolio

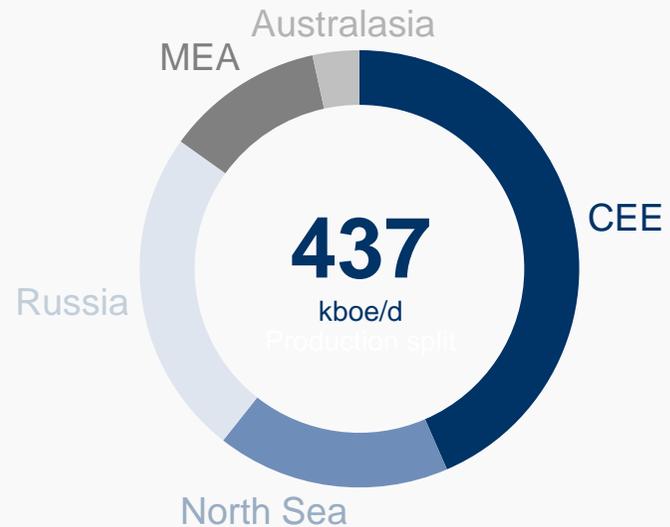


4+1 core and development regions

- ▶ CEE
 - ▶ North Sea
 - ▶ MEA
 - ▶ Russia
-  Australasia

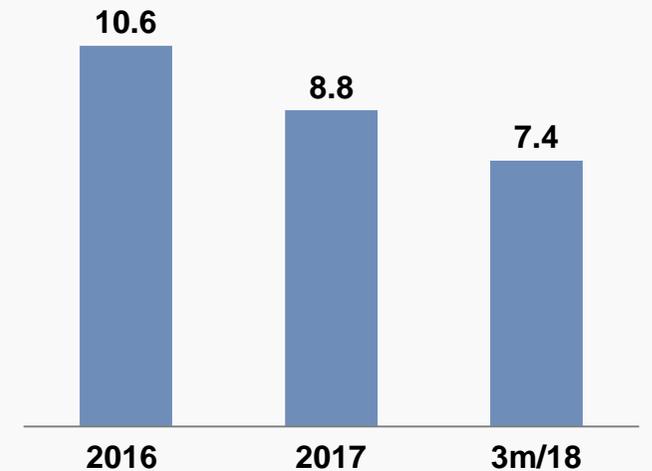
Production

3m/18 split by region, kboe/d



Low production cost

USD/boe



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 network¹ in Austria



Reliable partnerships

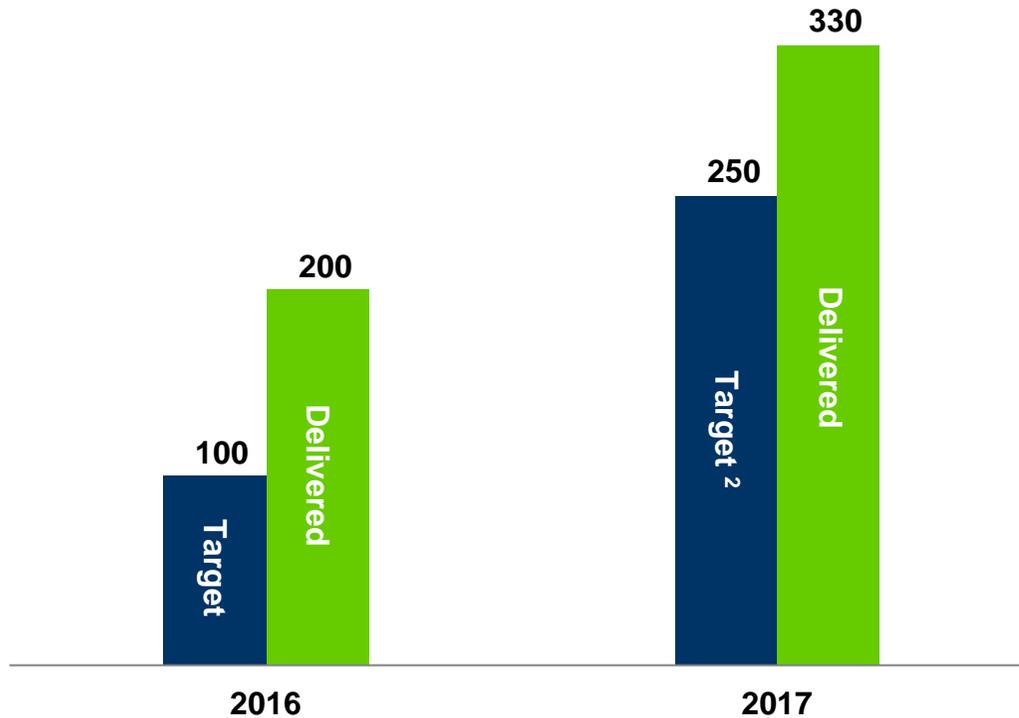
Long-term reliable partnerships with Europe's major gas suppliers

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

Stringent cost discipline

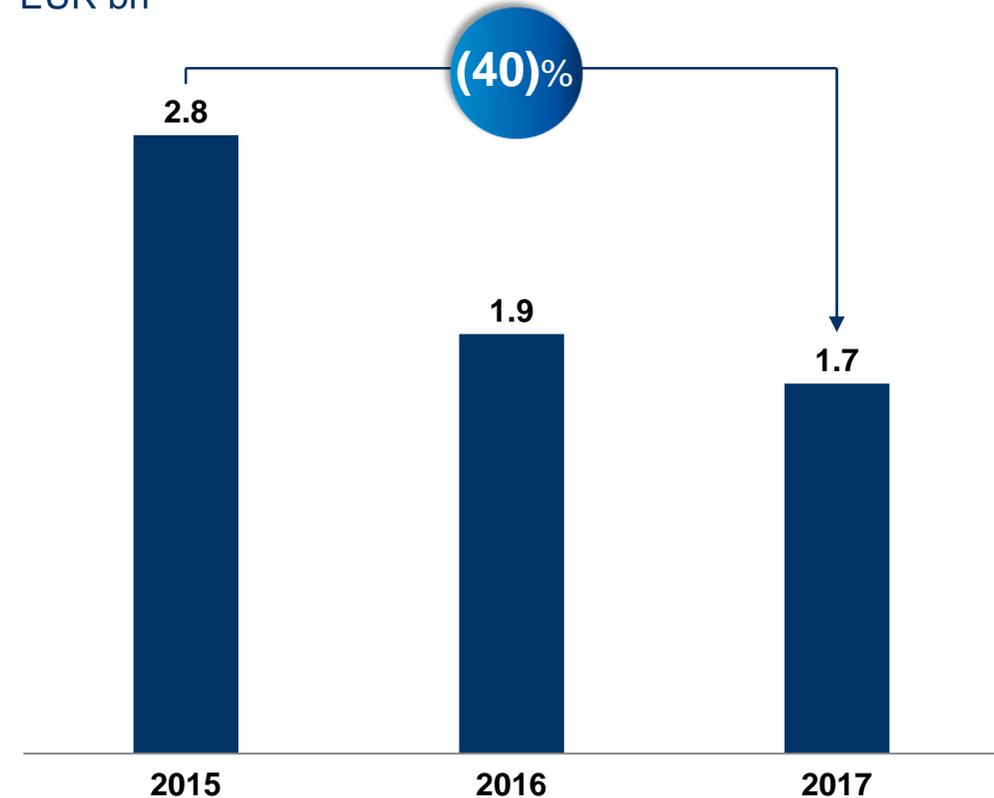
Cost savings program ¹

2015 normalized baseline, EUR mn



CAPEX ³

EUR bn



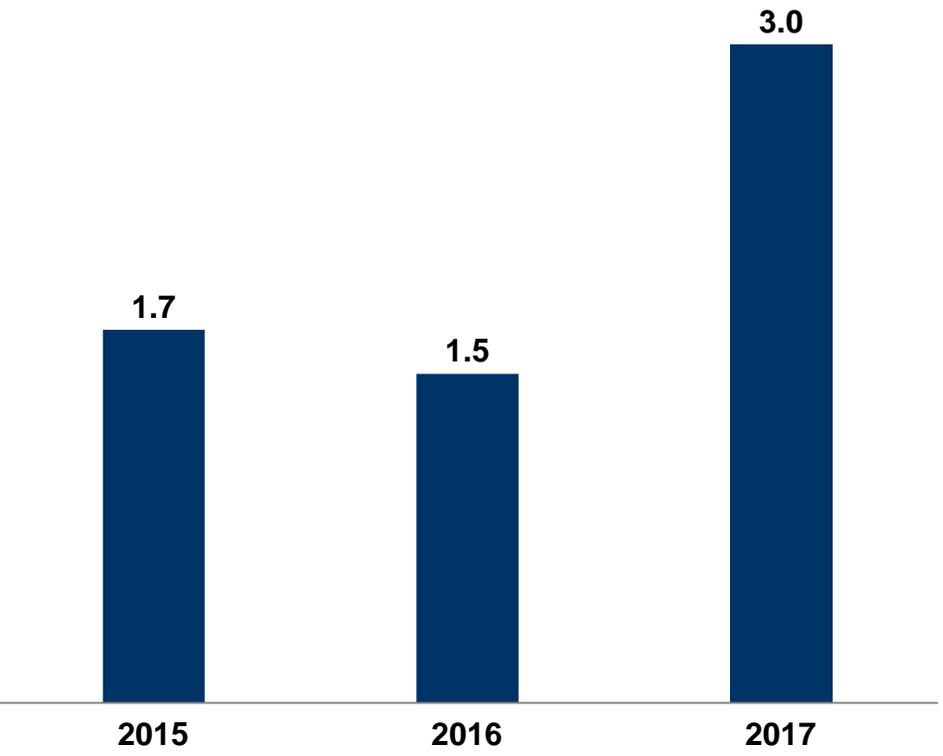
¹ Based on Operating Cost versus 2015 baseline according to OMV definition on a comparable basis

² The 2017 target has been increased following the over-achievement in 2016 from EUR 150 mn to EUR 250 mn

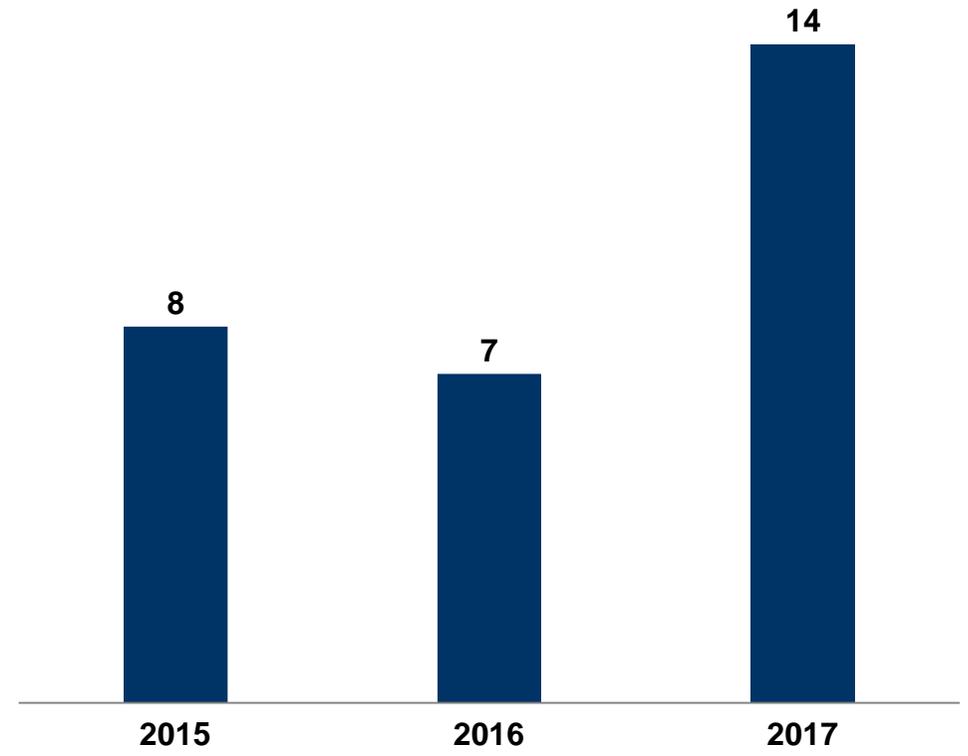
³ CAPEX including capitalized Exploration and Appraisal expenditures and excluding Yuzhno Russkoye acquisition

Improved profitability

Clean CCS Operating Result
EUR bn

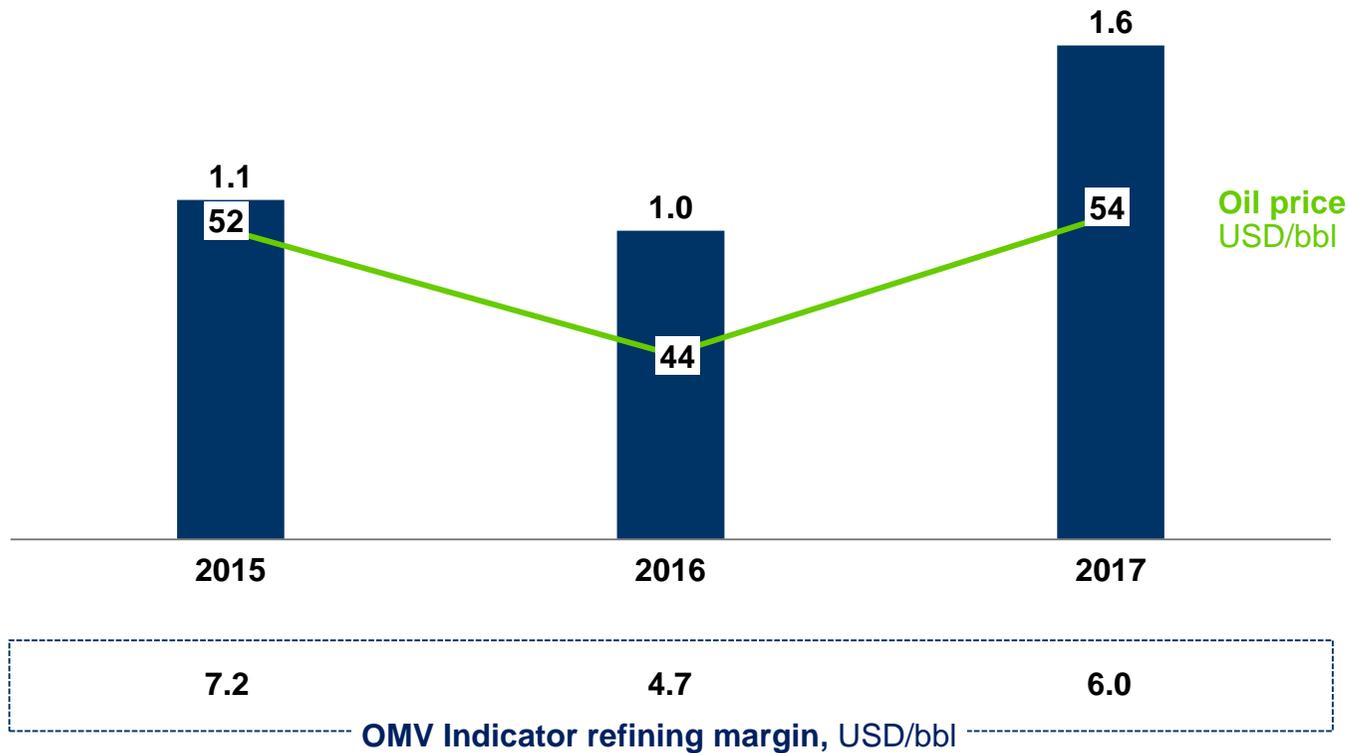


Clean CCS ROACE
%



Substantially improved financial performance

Clean CCS net income attributable to stockholders EUR bn



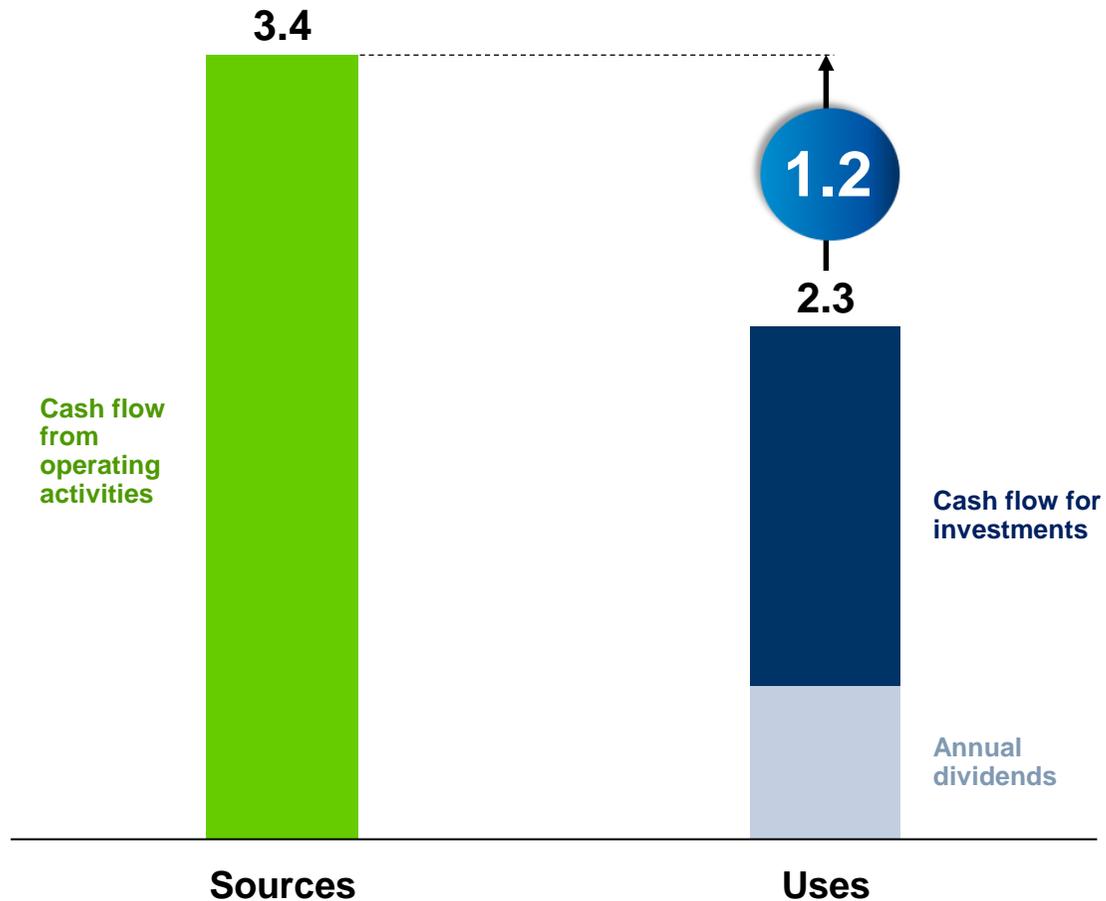
Clean CCS
EPS
2017, EUR
4.97

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

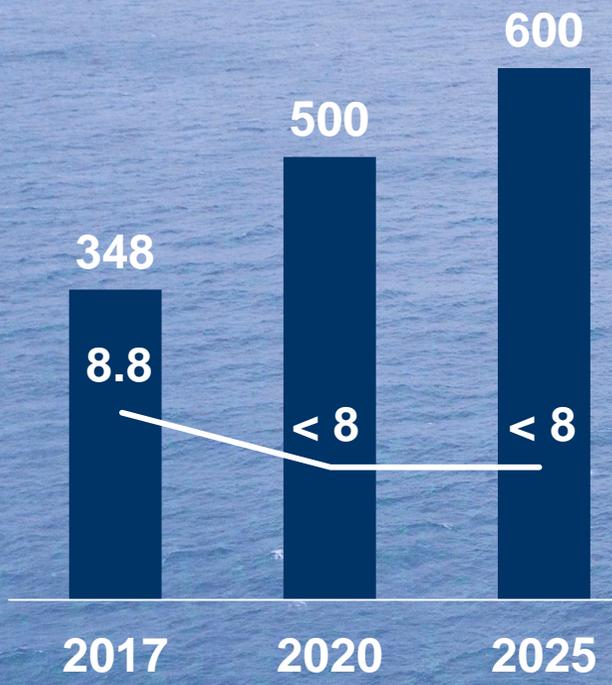


- ▶ Leverage on proven concept of **integration**
- ▶ Significantly **internationalize** Upstream and Downstream
- ▶ Build **strong gas market presence** in Europe
- ▶ Extend record of **operational excellence**

Drive operating result and cash generation

Higher-quality Upstream portfolio

Focused international player



■ Production volumes, kboe/d
— Production cost, USD/boe

> 100%
Reserve
Replacement
Rate ¹

4+1
core
regions



¹ 3 years average

Downstream Oil – Further strengthen European position and grow internationally

1st quartile¹

Fuels

Net cash margin

Total cash OPEX

Energy intensity index

Olefins

Total cash OPEX

Maintenance

Energy intensity index

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

¹ Solomon benchmarking; for Schwabach and Burghausen refineries

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

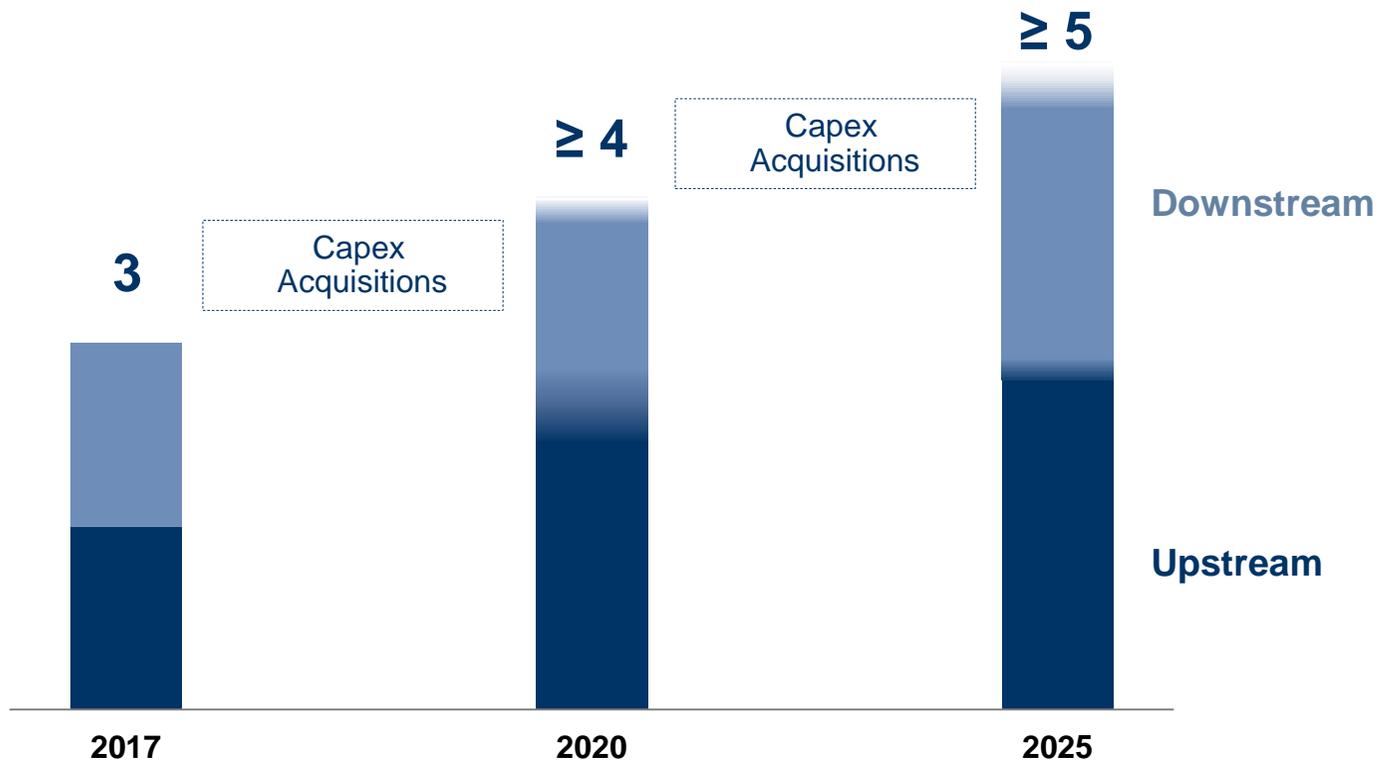


380 bcm imports required ¹

¹ Imports required in the European Union

Continue to grow value

Clean CCS Operating Result EUR bn

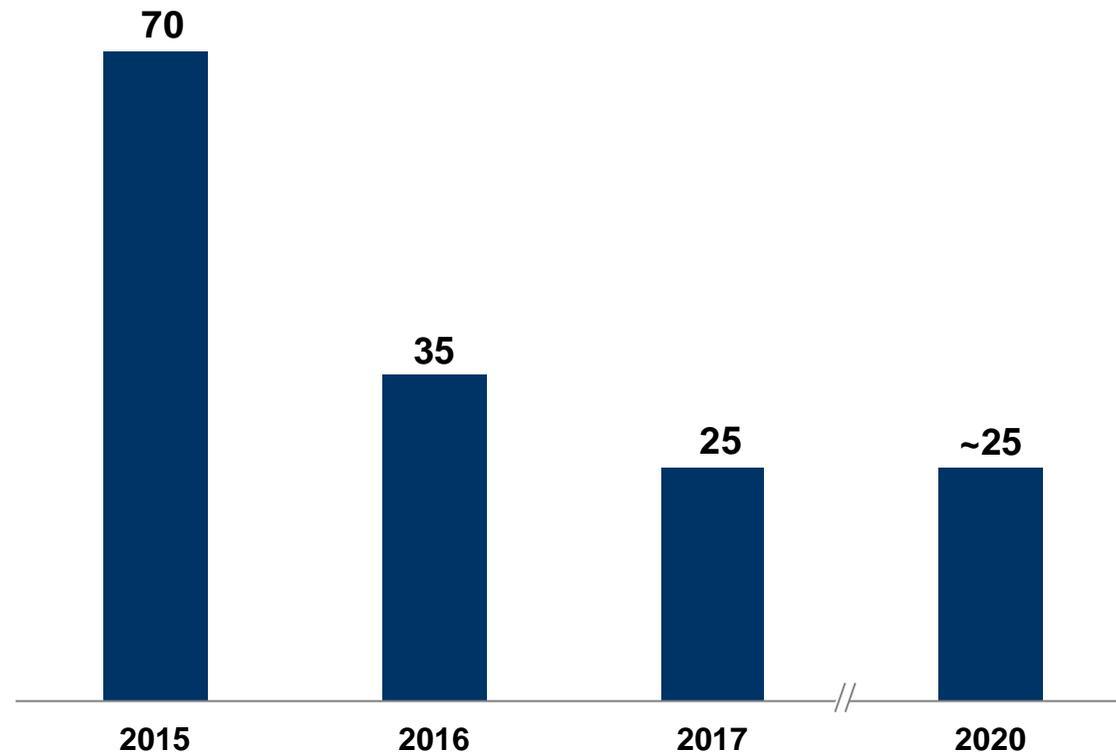


- ▶ **Positive free cash flow** after dividends
- ▶ Long term **gearing ratio** target of $\leq 30\%$
- ▶ **Progressive dividend policy**

Maintain resilience

Oil price free cash flow break-even ¹

After dividends excluding acquisitions and disposals, USD/bbl



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

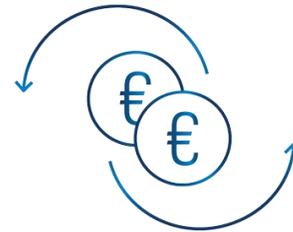
Further **streamlining of portfolio**

Leveraging **digitalization** and maintaining **cost efficiency**

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

Capital allocation priorities

- 1** CAPEX
- 2** Acquisitions
- 3** Dividends
- 4** Debt reduction



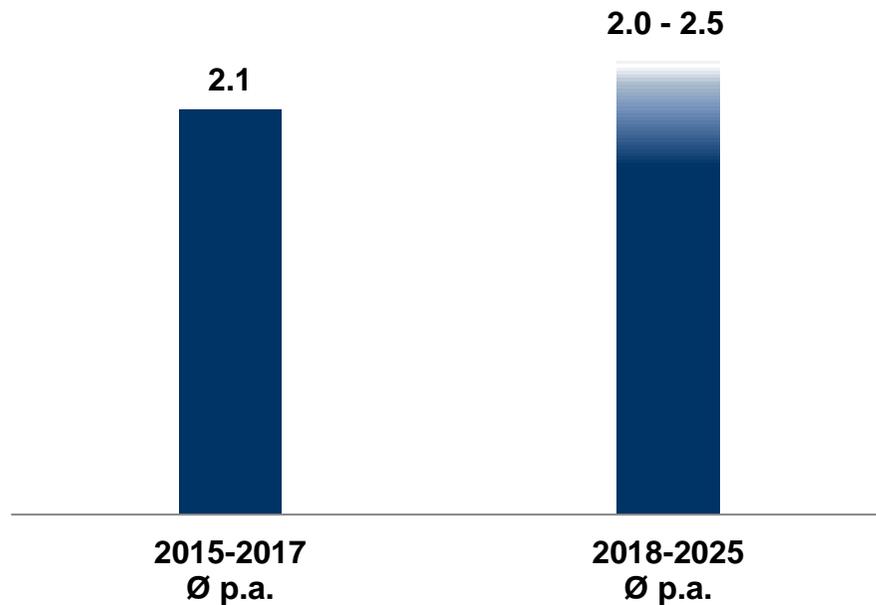
ROACE TARGET

≥12%

Mid- and long-term

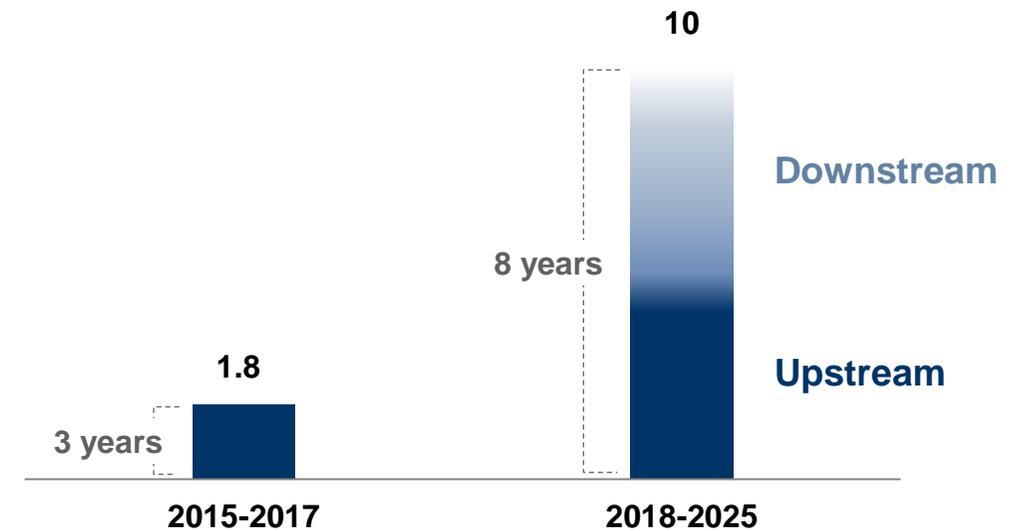
Focused investments

CAPEX EUR bn



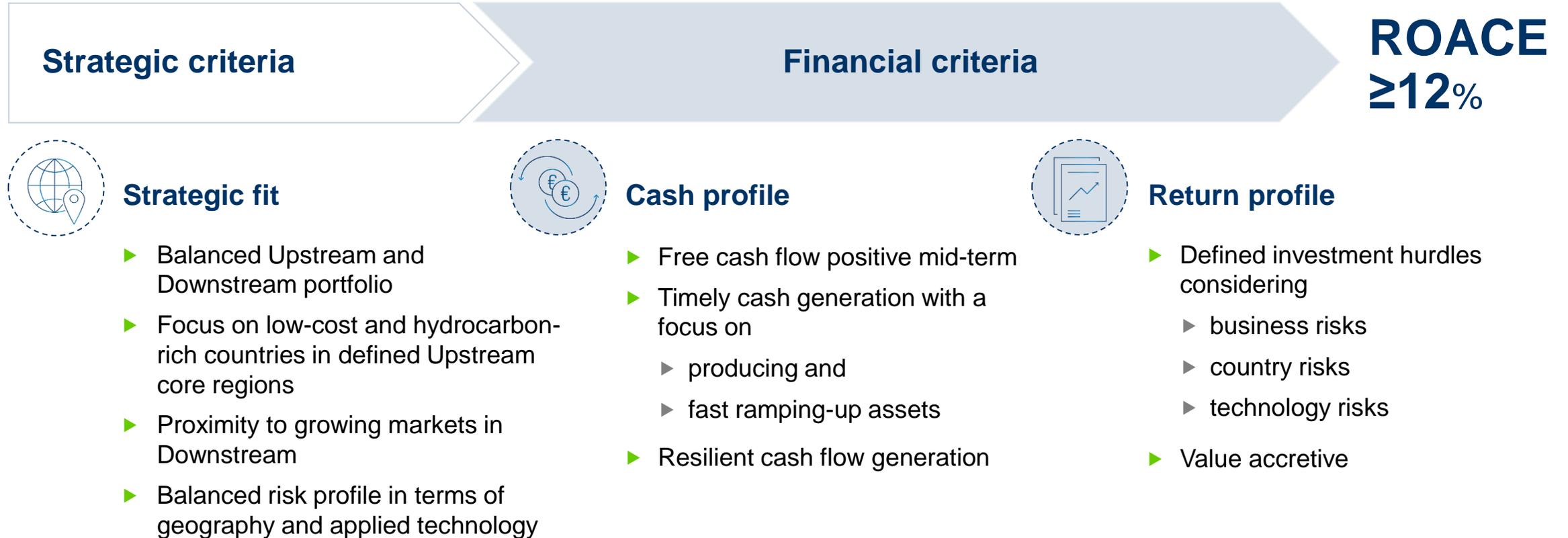
- ▶ Efficient capital allocation
- ▶ Strict cost management

Acquisitions EUR bn

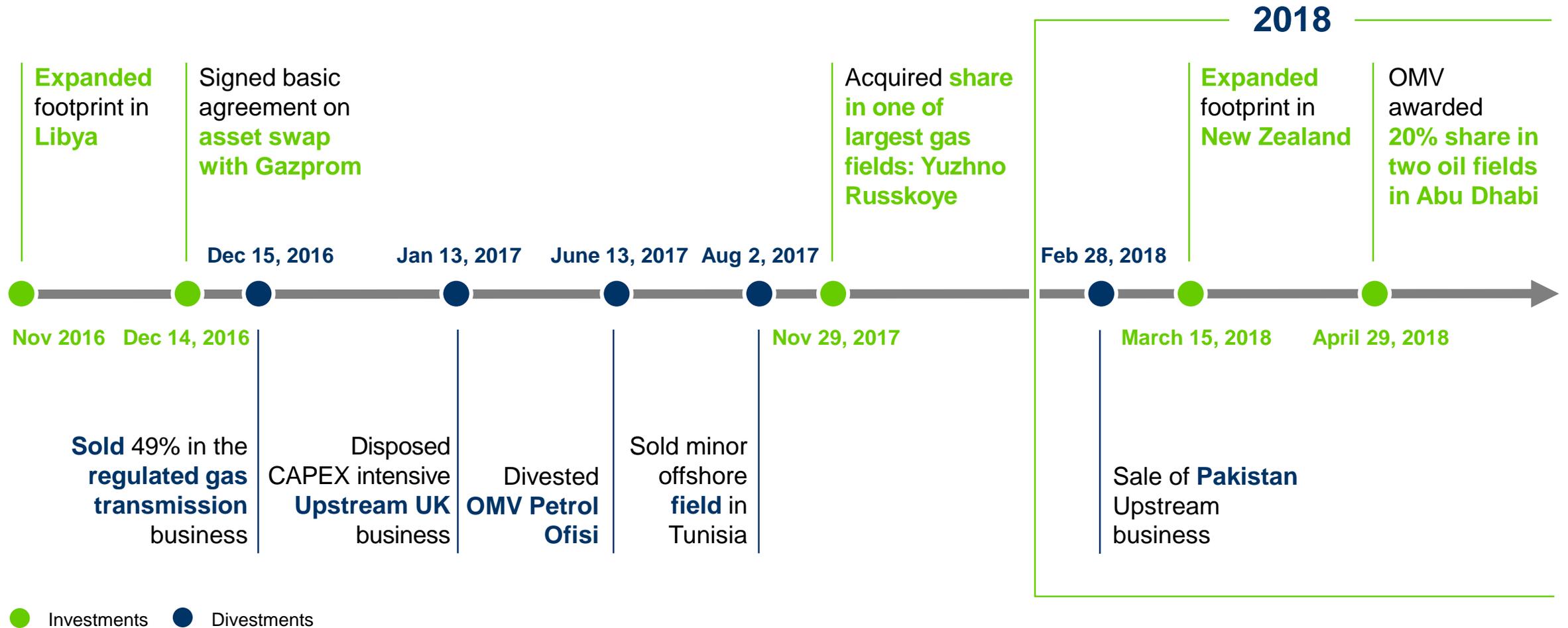


- ▶ Value adding acquisitions
- ▶ Keep optionality and flexibility
- ▶ Invest along the value chain

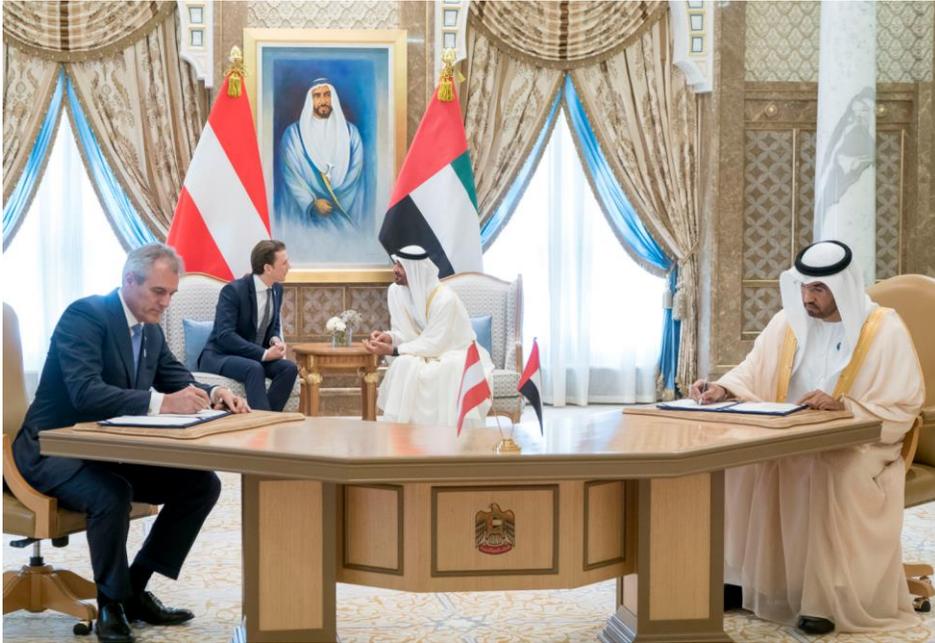
M&A criteria – focus on cash and value



Strong track record in portfolio management



Acquisition of a 20% stake in two offshore fields in Abu Dhabi from ADNOC



Signing ceremony OMV & ADNOC
Photo credit: Rashed Al Mansoori, Crown Prince Court

Front f.l.t.r.: Rainer Seele (CEO OMV Group) and HE Dr Sultan Ahmed Al Jaber (UAE Minister of State, Chairman of Masdar and CEO of ADNOC Group); Back f.l.t.r.: Sebastian Kurz (Chancellor of Austria) and HH Sheikh Mohamed bin Zayed Al Nahyan (Crown Prince of Abu Dhabi and Deputy Supreme Commander of the UAE Armed Forces)

- ▶ 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



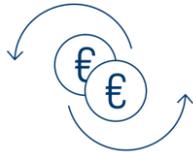
Adding 450 mn bbl to OMV's reserve base

- ▶ Substantially strengthening OMV's reserves base
- ▶ Upside potential from satellite fields



≥ 40 kbb/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

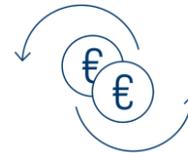
- ▶ Acquisition of Shell's Upstream business in New Zealand:
 - ▶ Increased stake in **Pohokura** by 48% and in **Maui** by 83.75% (31 kboe/d in Jan-Feb 2018)
 - ▶ 60.98% interest in the Great South Basin exploration block
- ▶ OMV intends to assume operatorship in both joint ventures
- ▶ Purchase price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



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

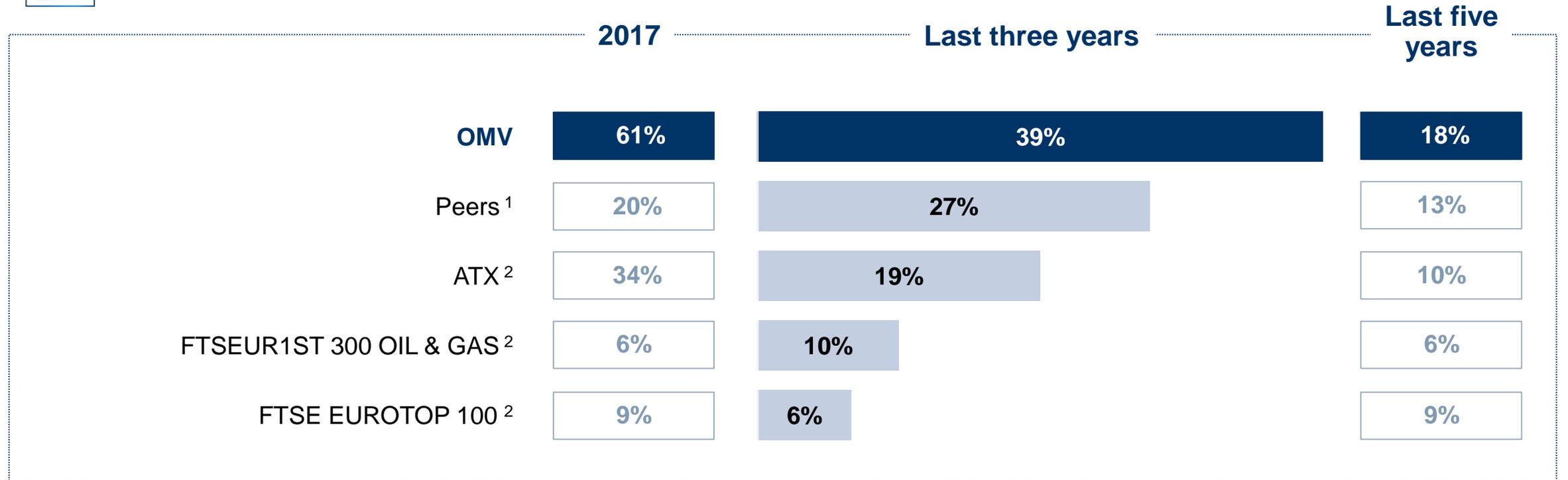
FPSO Raroa and Ensco drilling rig, Maari field, New Zealand

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

Attractive shareholder return



Annualized Total shareholder return

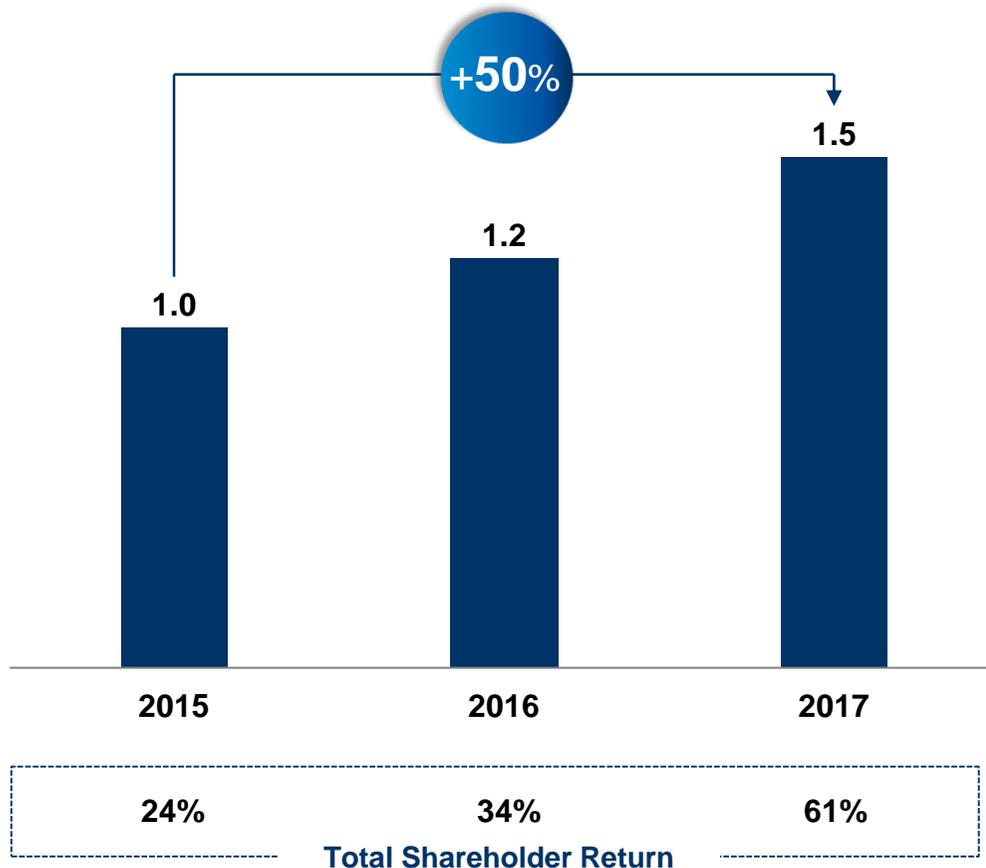


¹ BP, ENI, Galp, Lundin Petroleum, MOL, Neste Oil, PKN Orlen, Repsol, Shell, Statoil, Total, Tupras

² Source: NASDAQ

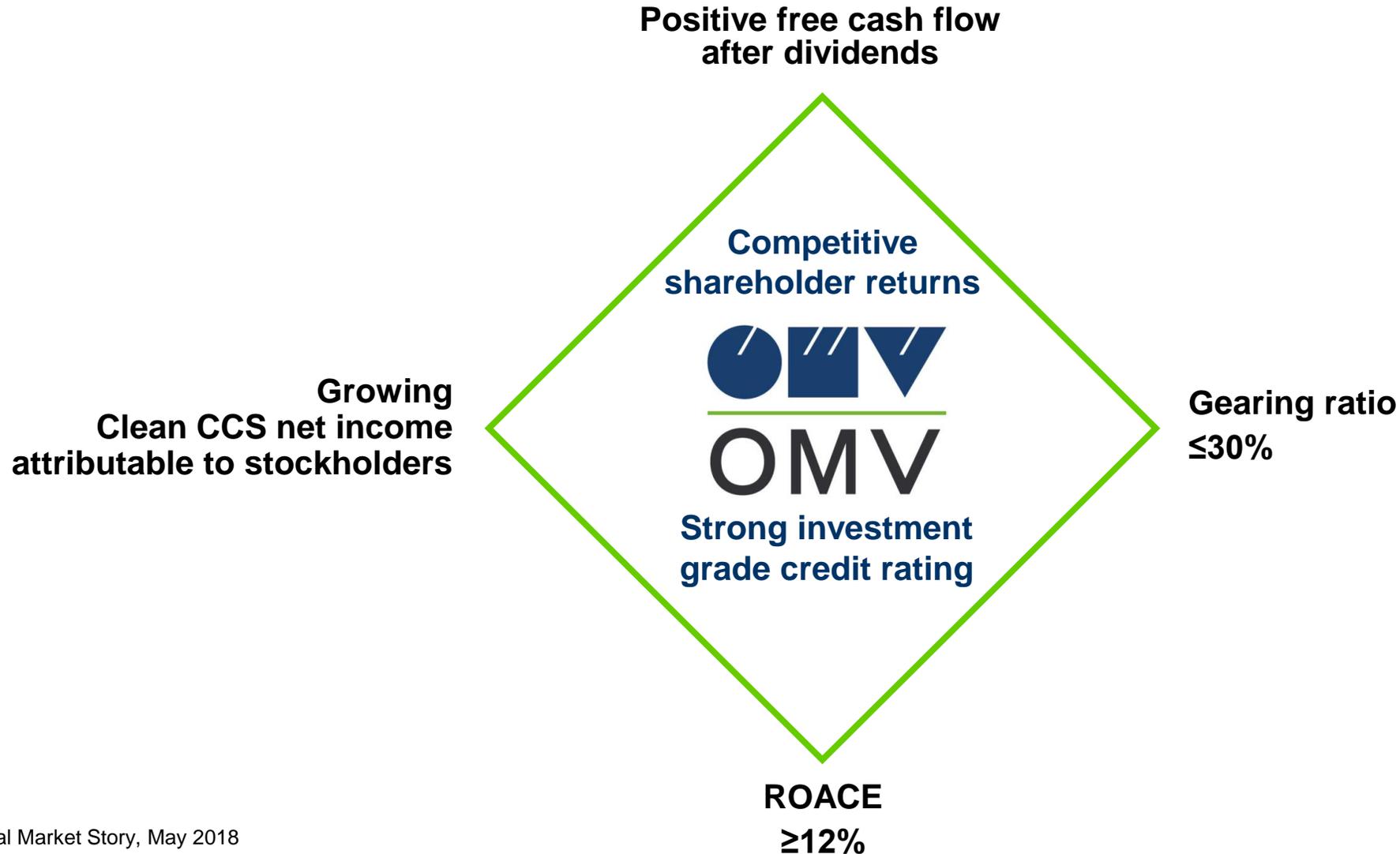
Progressive dividend policy

Dividend per share
EUR



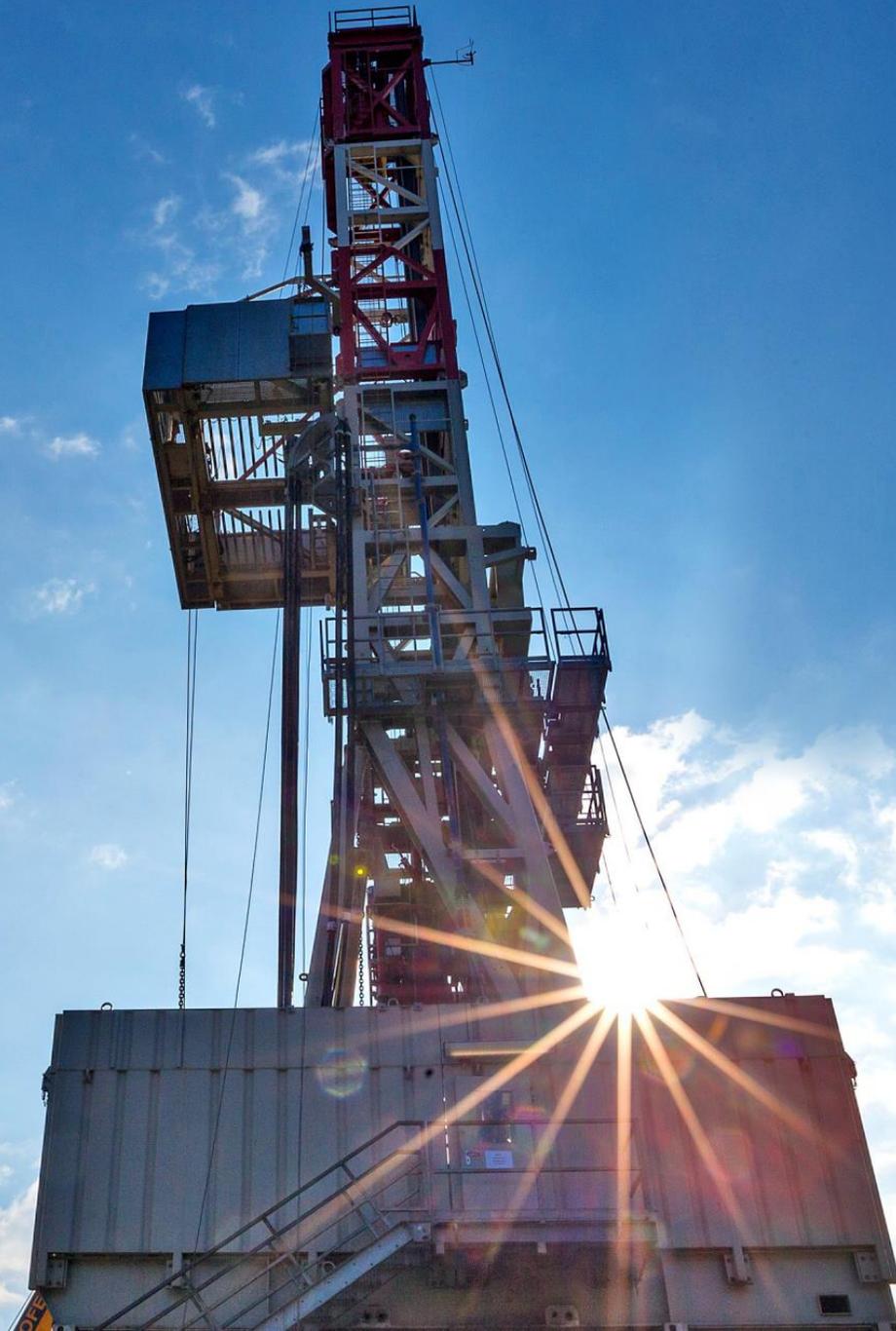
- ▶ **Record dividend of EUR 1.50** per share for 2017 proposed
- ▶ We are committed to delivering an **attractive and predictable shareholder return** through the business cycle
- ▶ **Progressive dividend policy:** OMV aims to increase the dividend or at least maintain it at the previous year's level in line with the Group's financial performance

Financial priorities and long-term targets

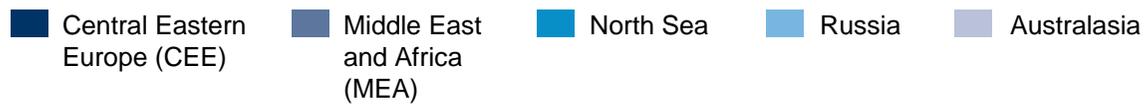
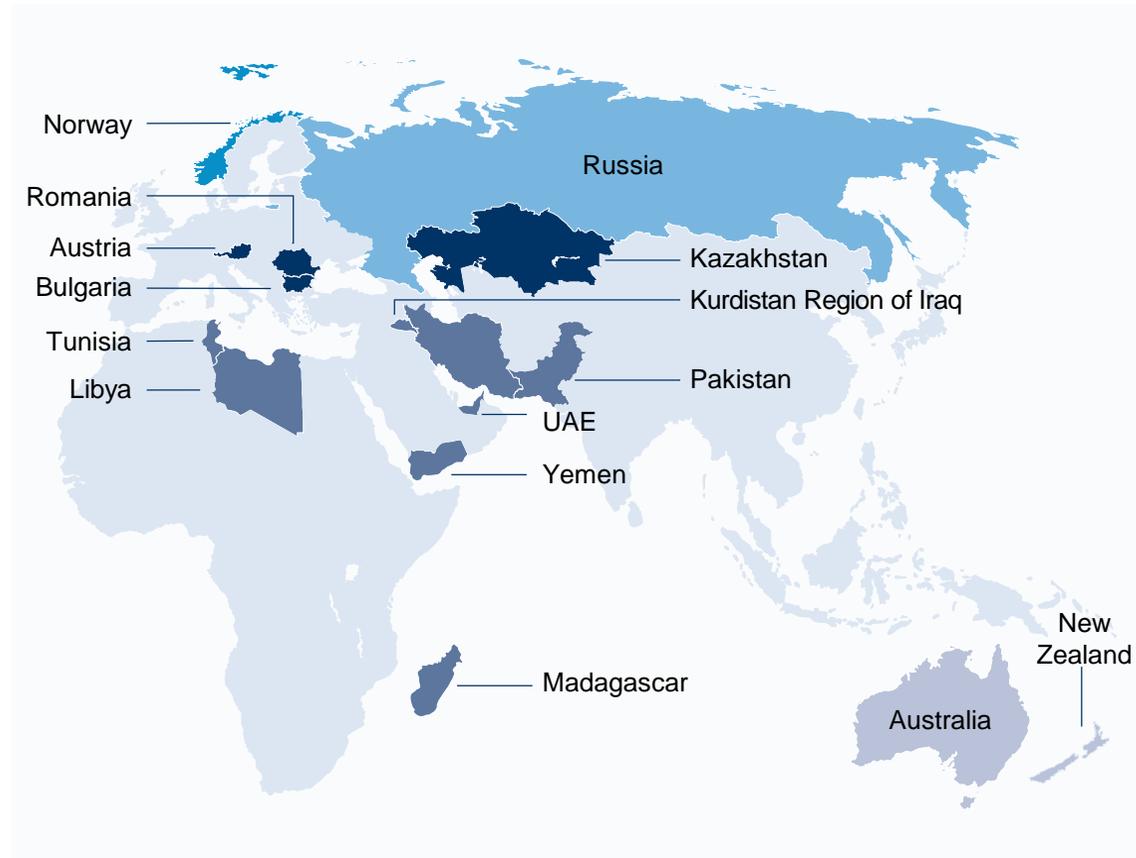


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Upstream



Upstream – at a Glance



2017 position

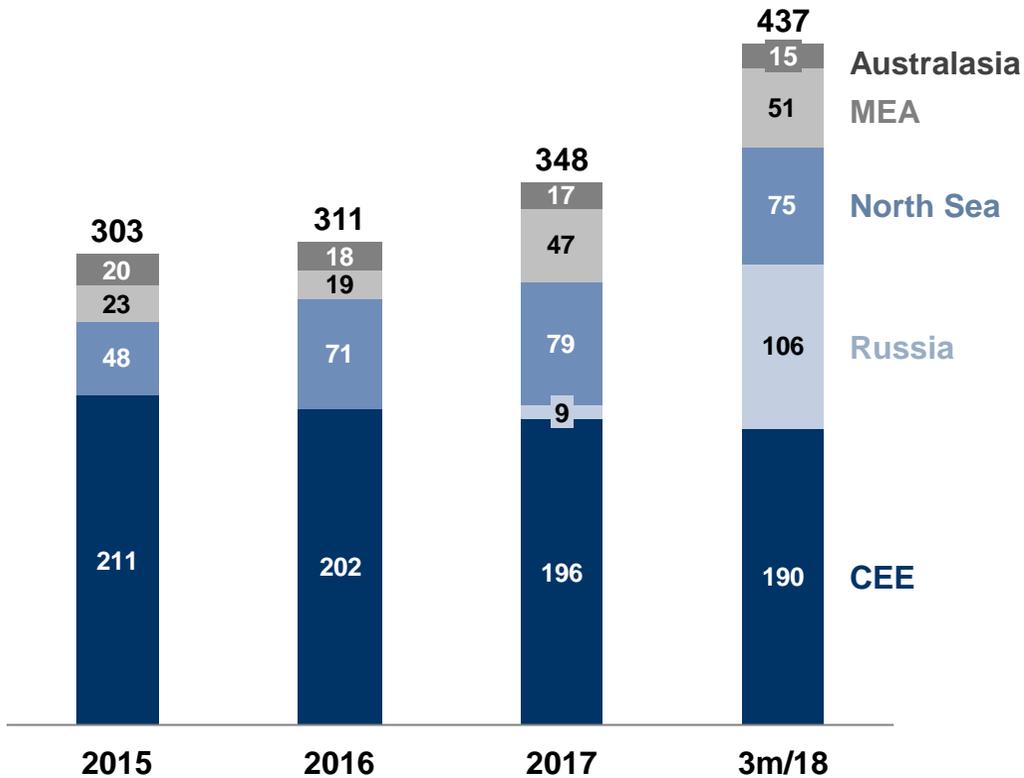
- ▶ **348 kboe/d production** (3m/18: 437 kboe/d) with an oil and gas split of **52:48**
- ▶ **Production cost at USD 8.8/boe** (3m/18: USD 7.4/boe)
- ▶ **1P Reserves of 1,146 mn boe**
- ▶ **Reserve Replacement Rate of 116%** on a 3 years average

Competitive advantages

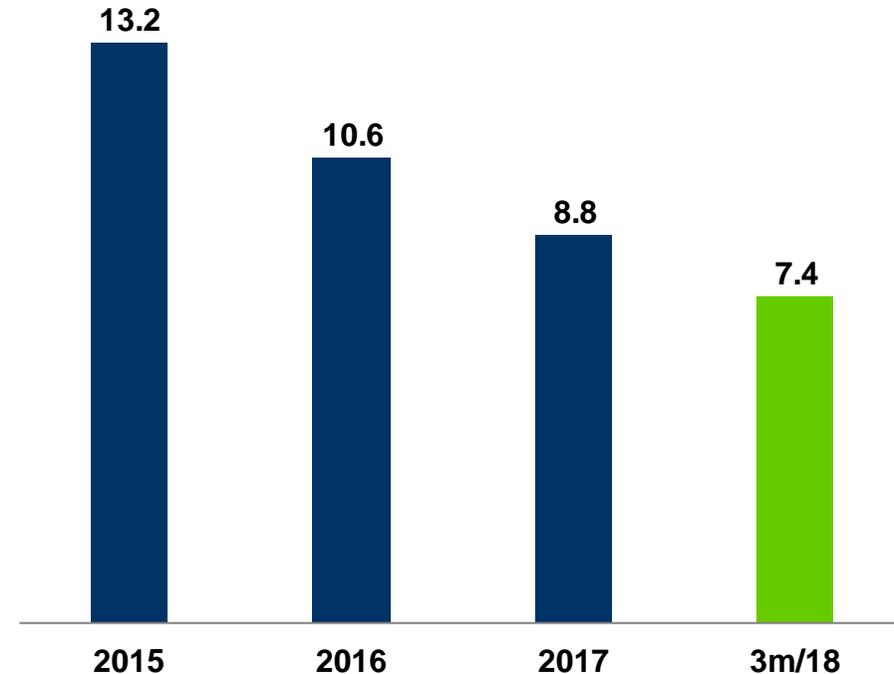
- ▶ **Focused portfolio with 4+1 regions**
- ▶ **Well positioned in attractive regions**
- ▶ **Low production cost**
- ▶ **Strong partnerships** with the major players in the richest hydrocarbon regions

Growing production, lowering cost

Production
Kboe/d



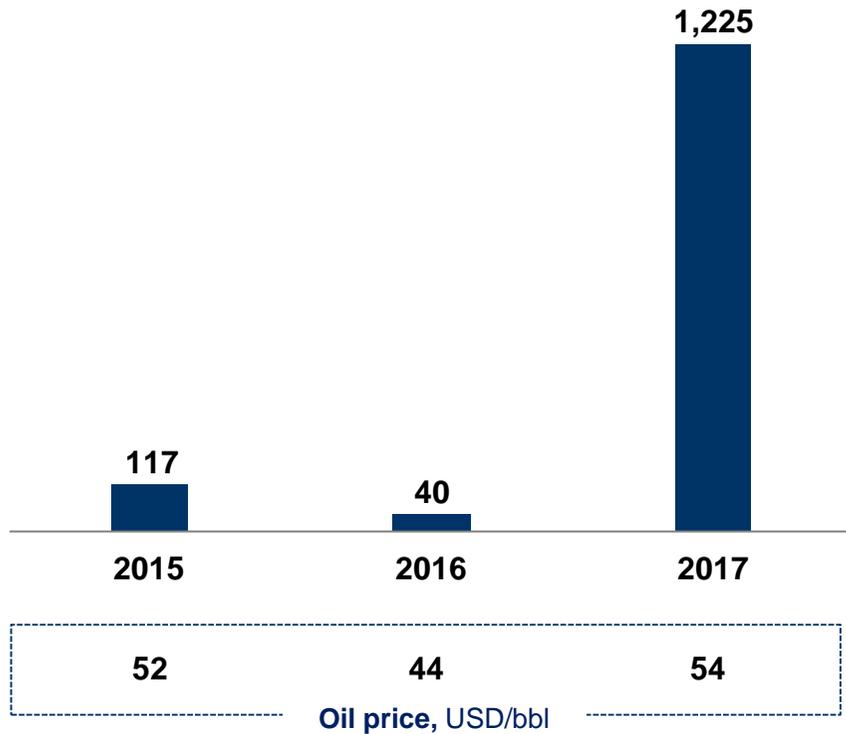
Production cost ¹
USD/boe



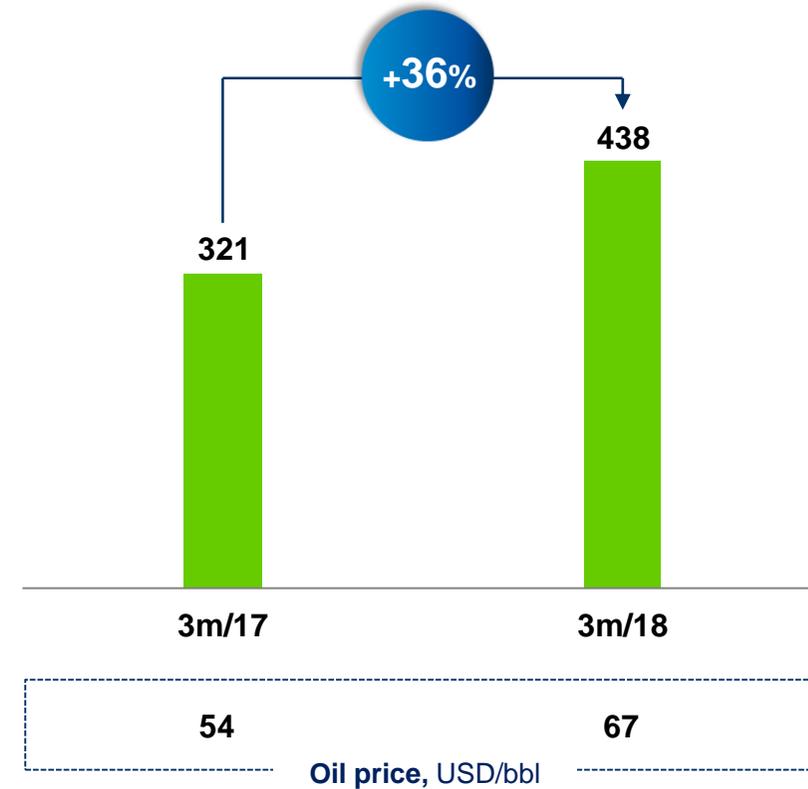
¹ OMV aligned the production cost definition with its industry peers; since Q1/17, administrative expenses and selling and distribution costs are excluded; for comparison only, 2016 figures presented in the table were re-calculated

Increased earnings

Clean Operating Result
EUR mn



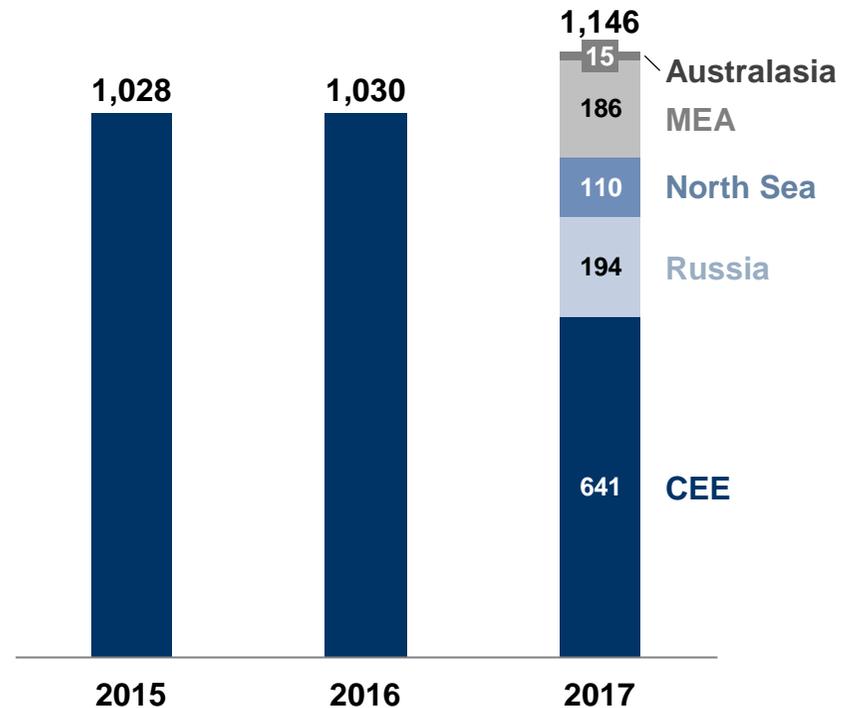
Clean Operating Result
EUR mn



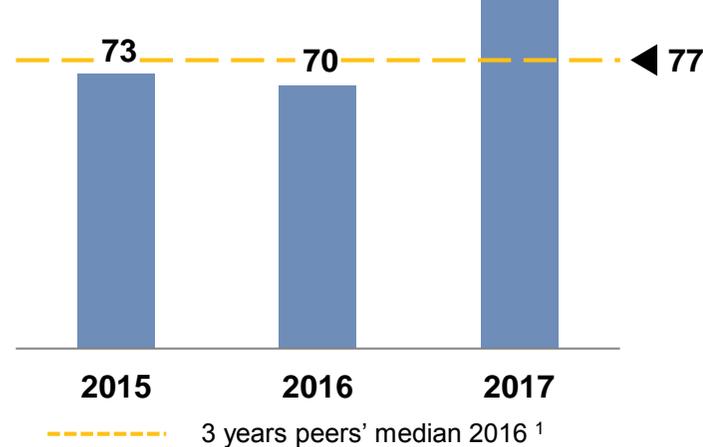
¹ OMV aligned the production cost definition with its industry peers; since Q1/17, administrative expenses and selling and distribution costs are excluded; for comparison only, 2016 figures presented in the table were re-calculated

Strengthened reserve base

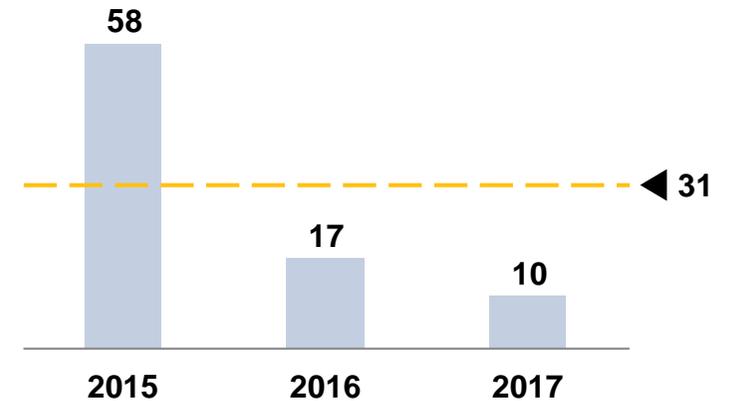
1P Reserves
Mn boe



Reserve Replacement Rate
3 years Ø RRR, %



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



¹ Source: IHS Markit (Anadarko, Apache, BP, ENI, Hess Corp, Lukoil, Murphy, Occidental, Repsol, Shell, Statoil, Total)
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Upstream strategy 2025



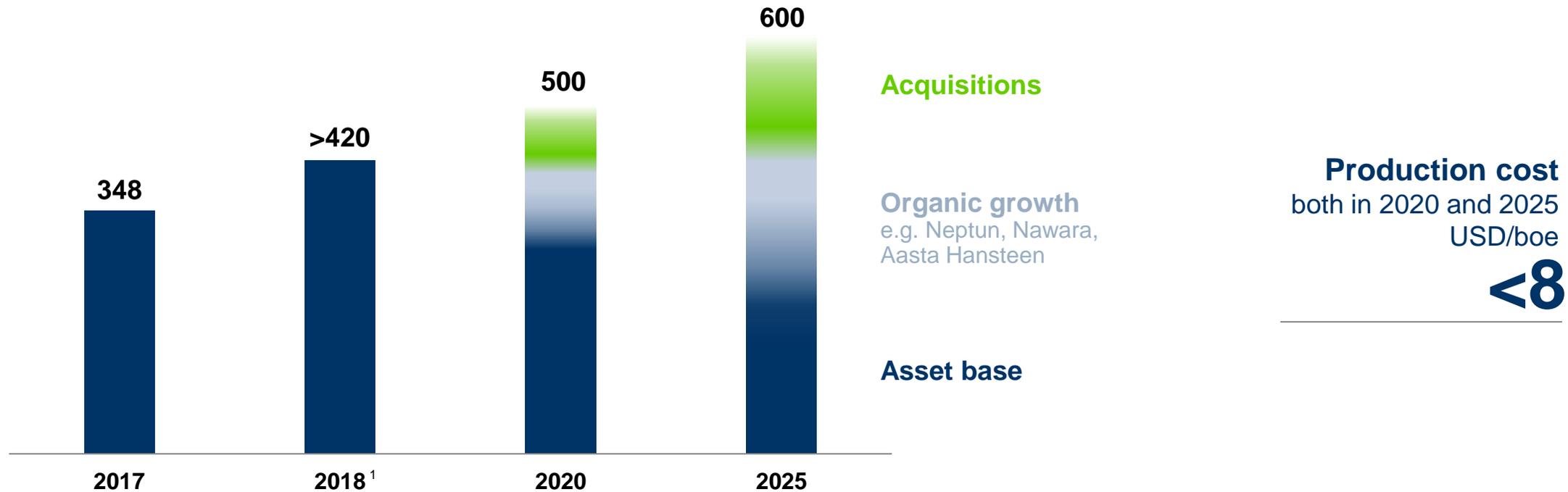
- ▶ Renew and improve the quality of our asset base
- ▶ Double reserves
- ▶ Extend track record of operational excellence
- ▶ Increase cash generation

Higher-quality portfolio generating more cash

Drive production organically and via acquisitions

Production growth

Kboe/d

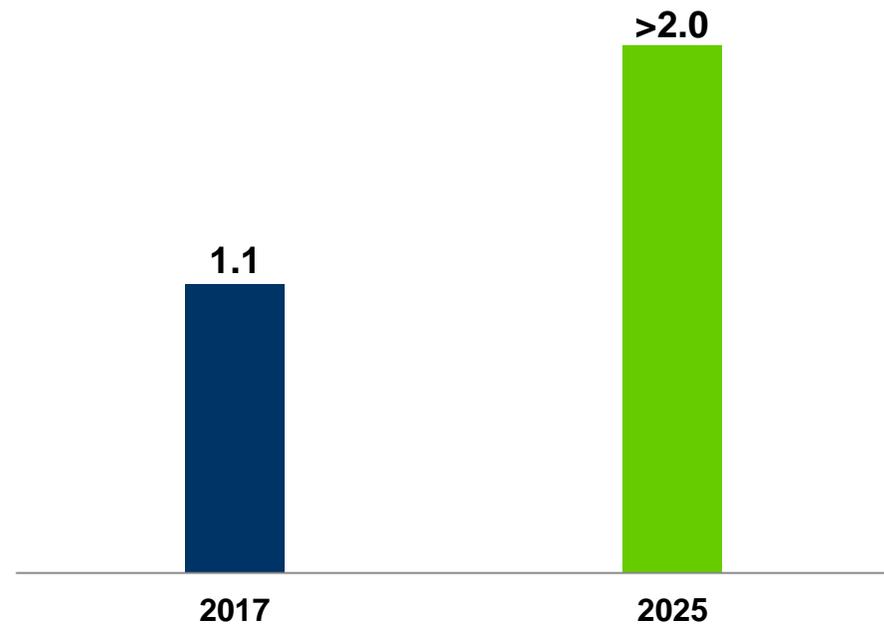


¹ Excluding acquisitions and divestments

Ensure sustainable reserve replenishment

1P Reserve development

Bn boe



1P Reserves

2x

Reserve life
years

8-10

Reserve
Replacement Rate
3 years \emptyset , %

>100

Gas share
%

>50

Exploration: Faster and more disciplined approach

Excellent Barents Sea track record



Wisting drilling (Transocean Barents rig), Norway

1st well as new
play opener ✓

Successful appraisal
campaign ✓

World-record
drilling² ✓

- ▶ 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**

E&A budget
EUR mn p.a.¹

300

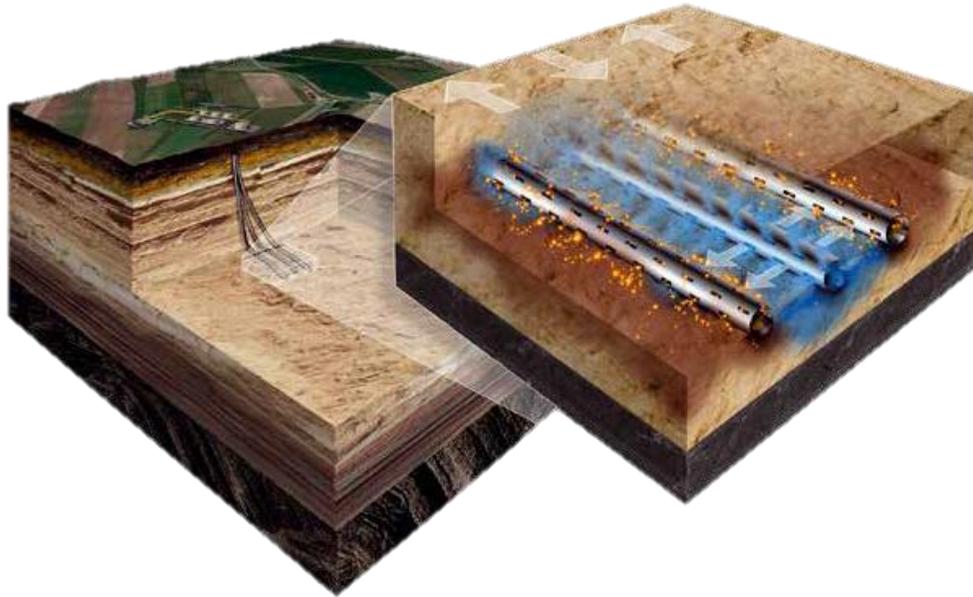
Wells
p.a.

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



Schematic picture of the polymer injection process

▶ 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 ¹)
- ▶ Low cost drilling ² 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



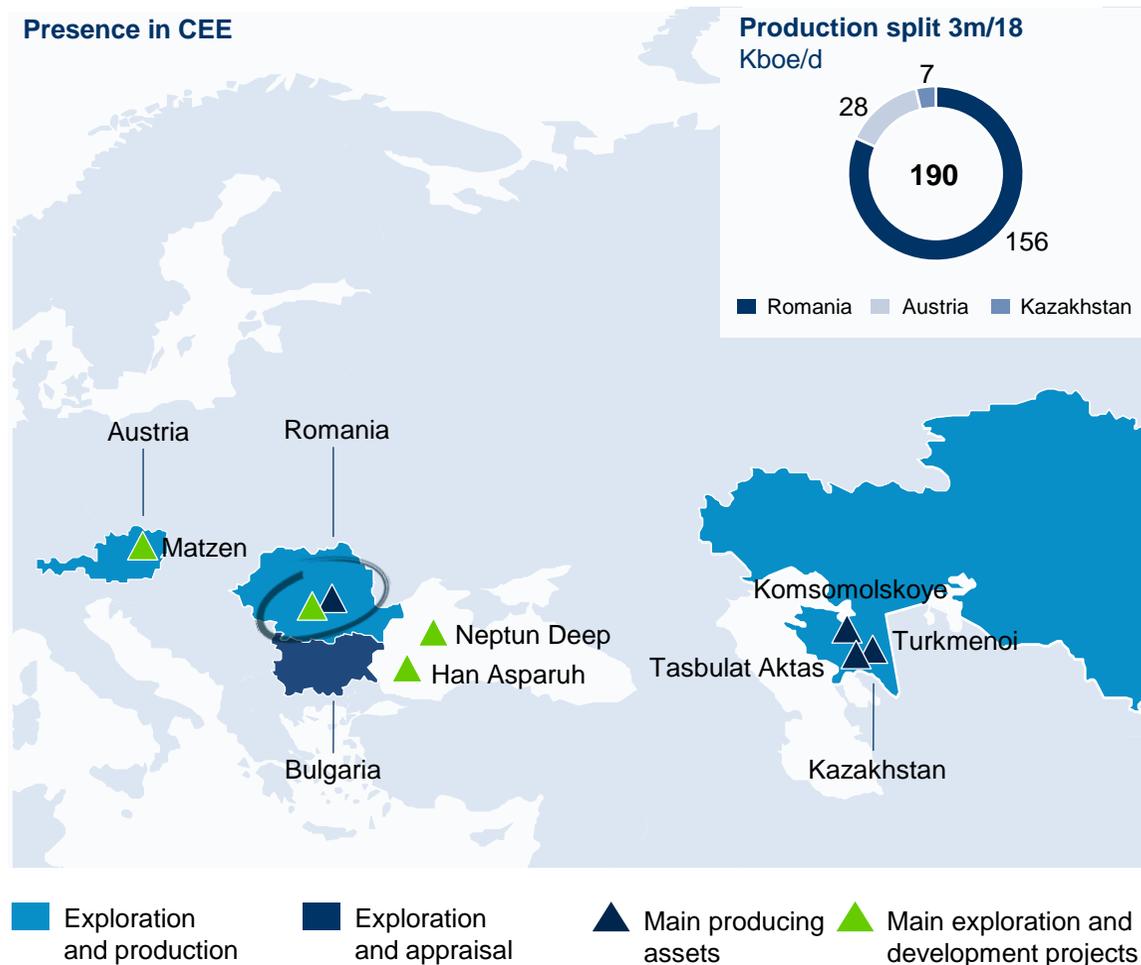
OMV Upstream regions

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

Note: Madagascar not depicted in map

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

► 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

Extensive engineering activities – Neptun Deep, Black Sea, Romania



Ocean Endeavor rig

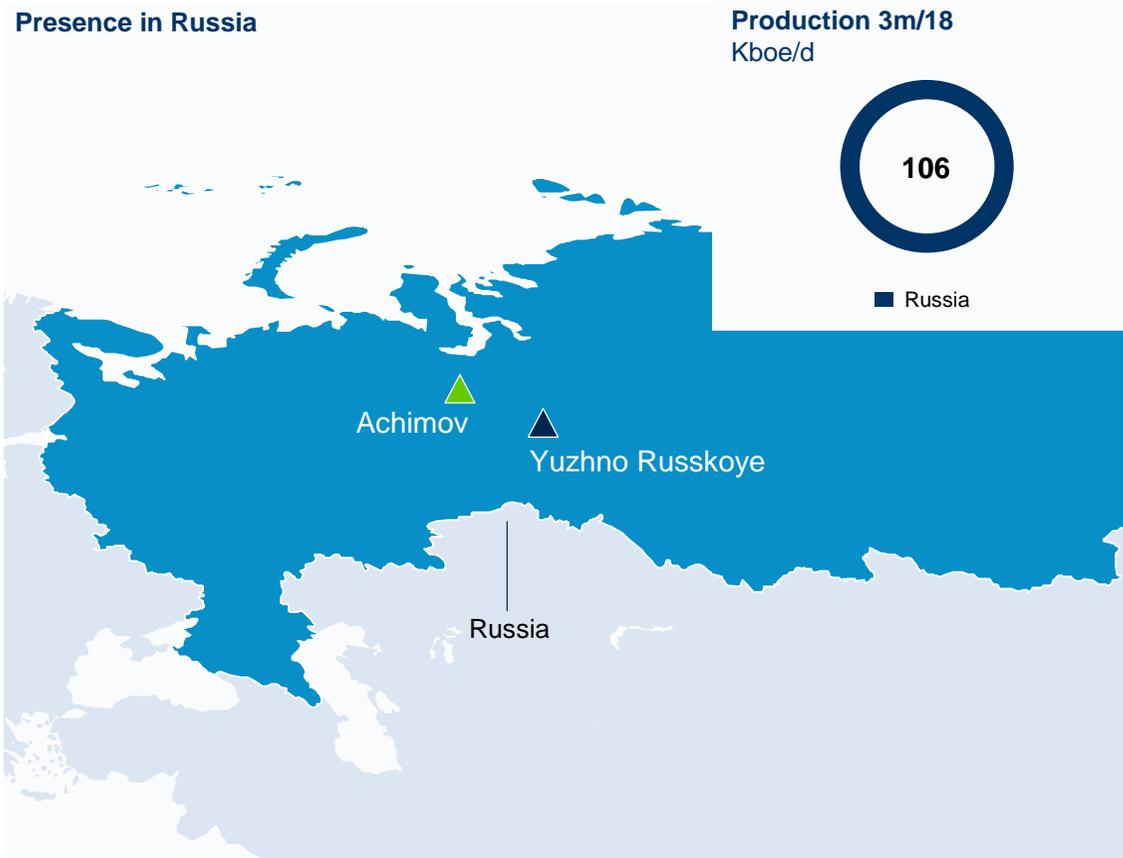
Neptun Deep – Project Phase: Engineering (pre-FID)

- ▶ **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 ¹
- ▶ **Joint Venture Expenditures to date (Exploration & Appraisal) over USD 1.5 bn** ²
- ▶ 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



▲ Main producing assets

▲ Main exploration and development projects

All figures net to OMV

¹ As per operator

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

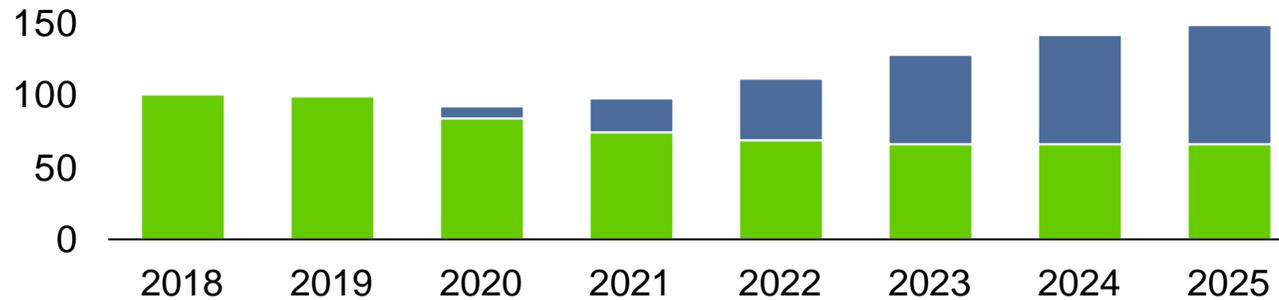
Russia – Yuzhno Russkoye and Achimov IV/V provides OMV with stable and sustainable production



Urengoy, Russia. Source: Gazprom

OMV production contribution from Russian fields ¹

Kboe/d



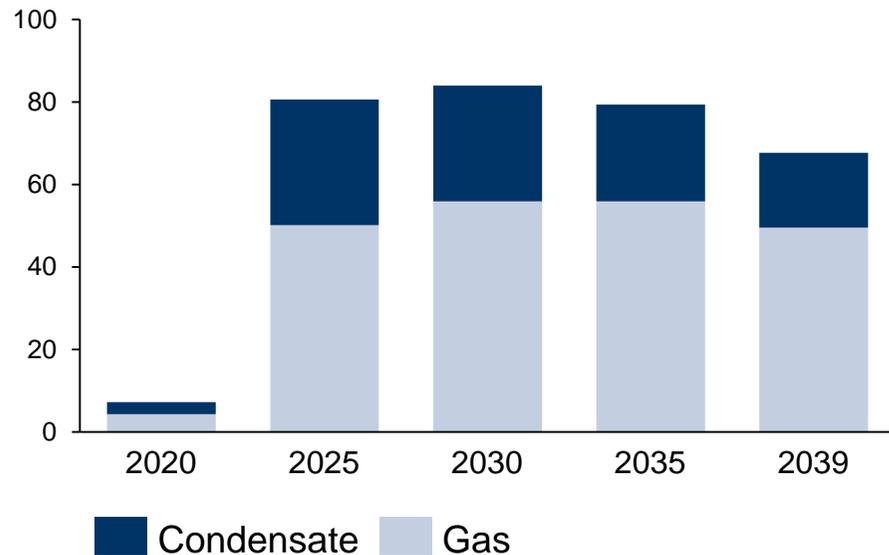
- ▶ Stable production flow for a very long period of time
- ▶ Production of ~150 kboe/d will be reached in 2025
- ▶ Achimov IV/V and Yuzhno Russkoye add more than 1 bn boe to OMV's reserves
- ▶ Cash inflow from Yuzhno Russkoye (dividends of approx. USD 200 mn p.a. mid-term) will be used to fund the capital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

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

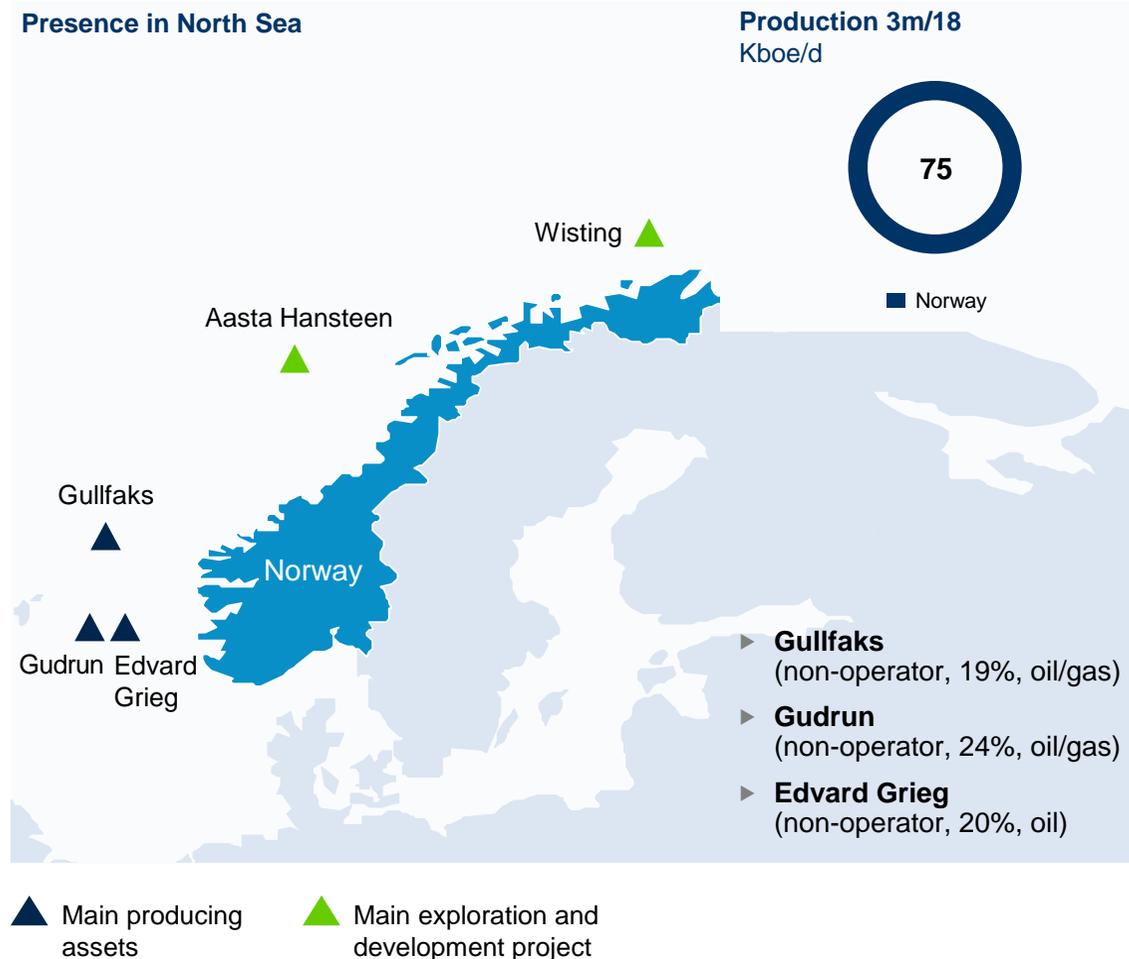
▶ Take-or-pay agreement

- ▶ **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

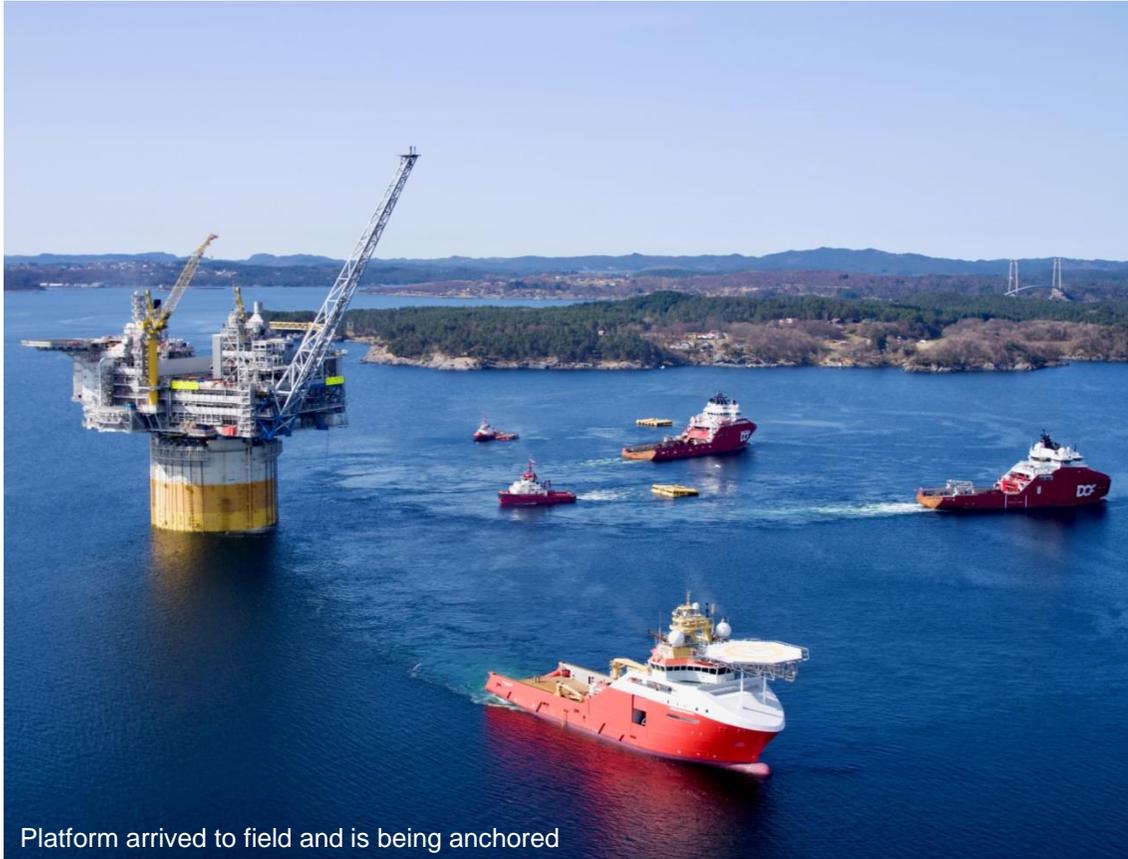
▶ Expand exploration portfolio leading to discoveries

- ▶ 34 licenses, thereof 7 operated¹ – 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

All figures net to OMV

¹ Status as of April 27, 2018

Platform successfully anchored – Aasta Hansteen, Norwegian Sea, Norway



Platform arrived to field and is being anchored

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

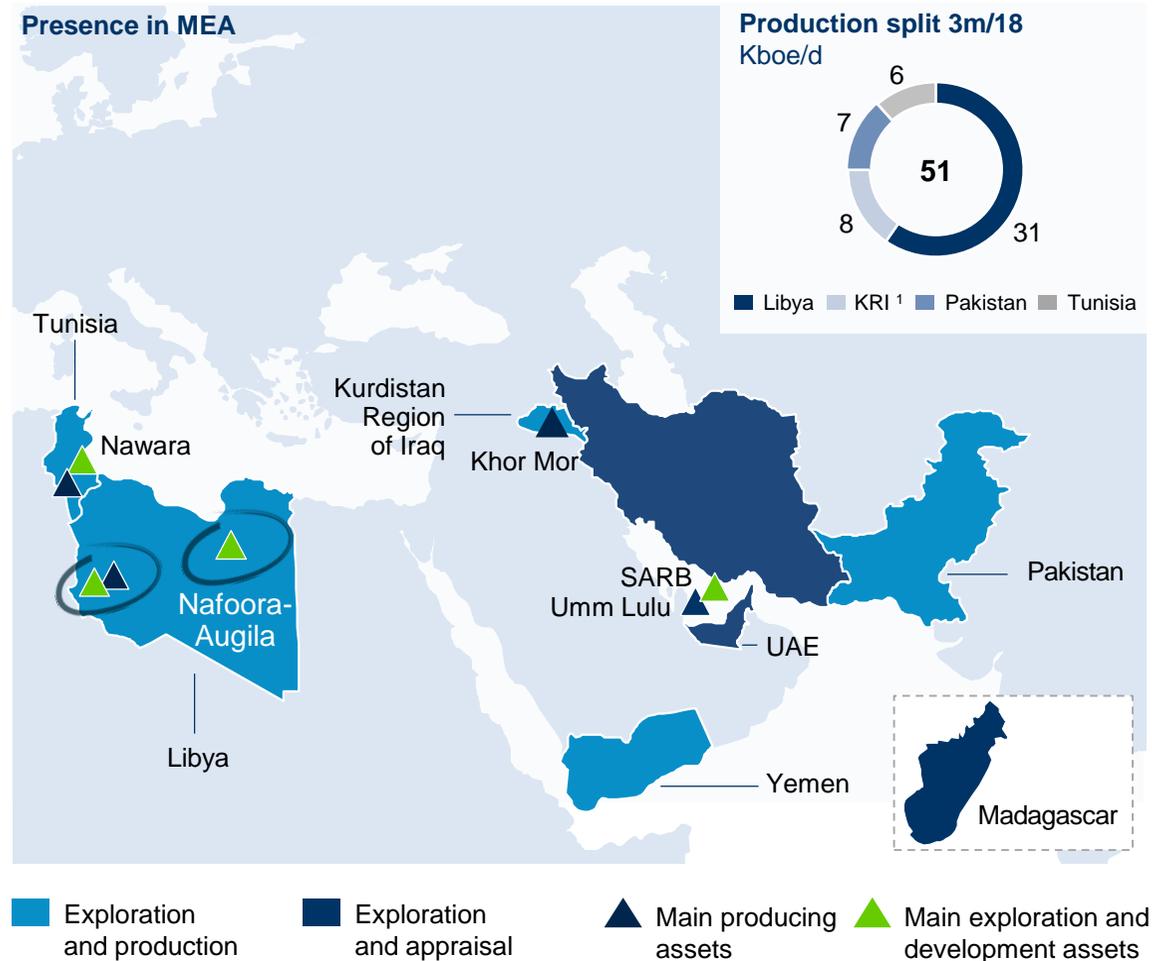


Wisting Central III appraisal well (Island Innovator), Norway

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 kbb/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



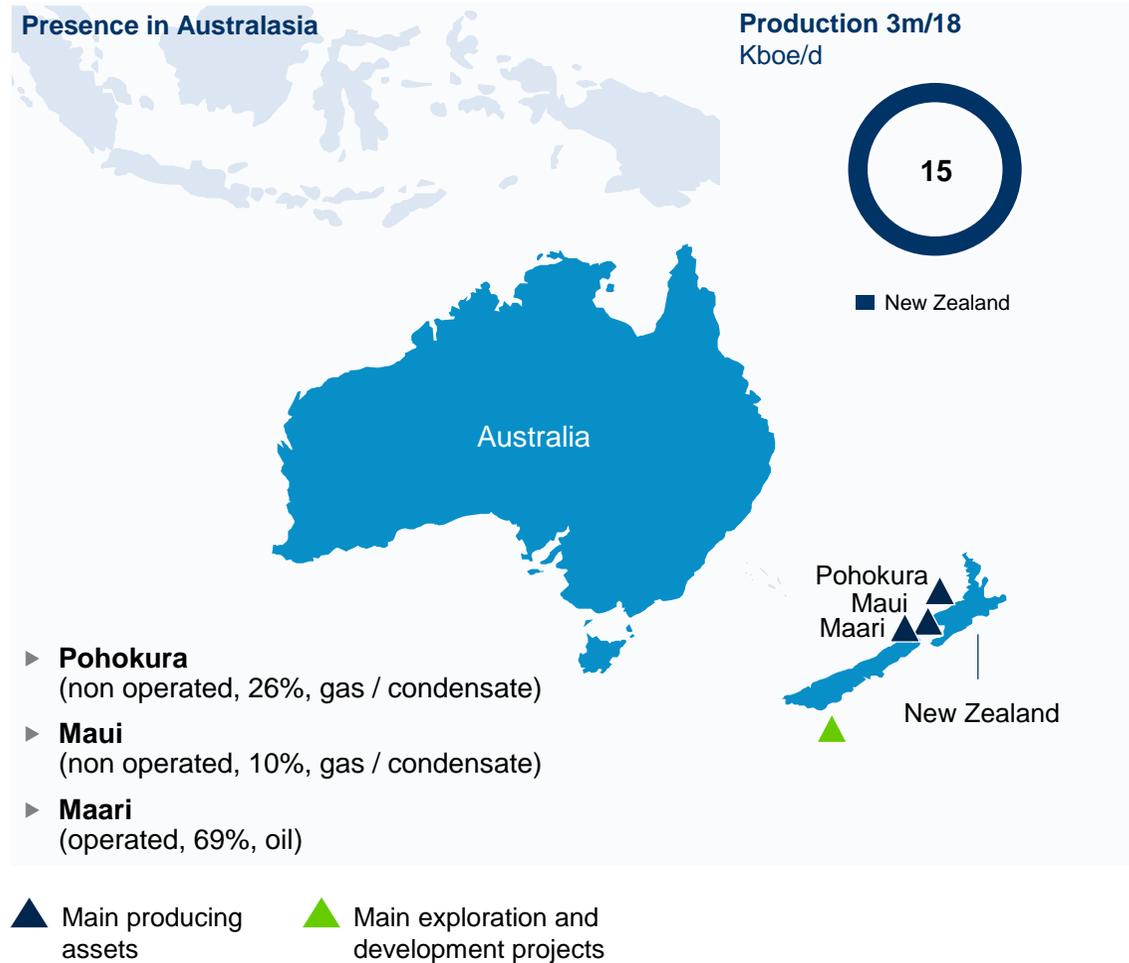
Nawara field – Project Phase: Execution

- ▶ **Licensees:** OMV (Operator, 50%), ETAP (50%)
- ▶ **Cumulative production** ¹: 40-50 mn boe of gas
- ▶ **Production start:** expected in 2019
- ▶ **Peak production** ¹: ~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



All figures net to OMV

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

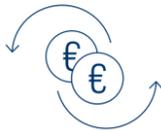
Acquisition in New Zealand – Major step towards building Australasia into a new core region



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

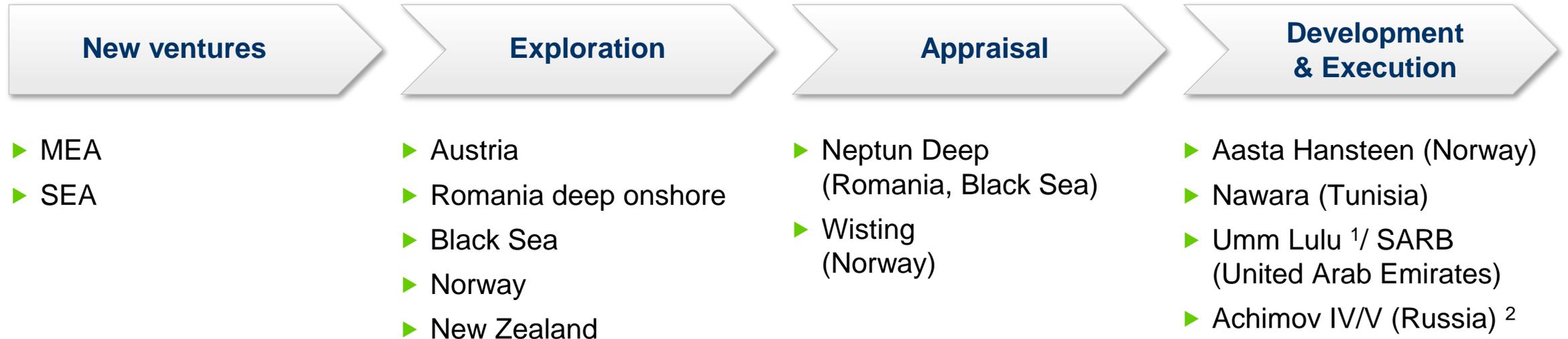


FPSO Raroa and Ensco drilling rig, Maari field, New Zealand

- ▶ 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

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

Upstream pipeline



As of March 2018

¹ Early production

² Basic agreement signed on December 14, 2016

Major projects

Development & Execution

Project	Country	Type primary	Production start year	Cumulative production ¹ mn boe	Peak production kboe/d	Working interest %	Operated	FID year
Aasta Hansteen		Gas	2018	~43	~18	15.0	no	2012
Nawara		Gas	2019	40-50	~10	50.0	by OMV	2014
Achimov IV/V ²		Gas/ Condensate	2020	560	>80	24.98	no	2016

Appraisal

Project	Country	Type primary	Production start year	Cumulative production ¹ mn boe	Working interest %	Operated
Neptun Deep		Gas	post 2020	125-250 ³	50.0 ⁴	no
Wisting		Oil	post 2020	up to 130	25.0	by OMV

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



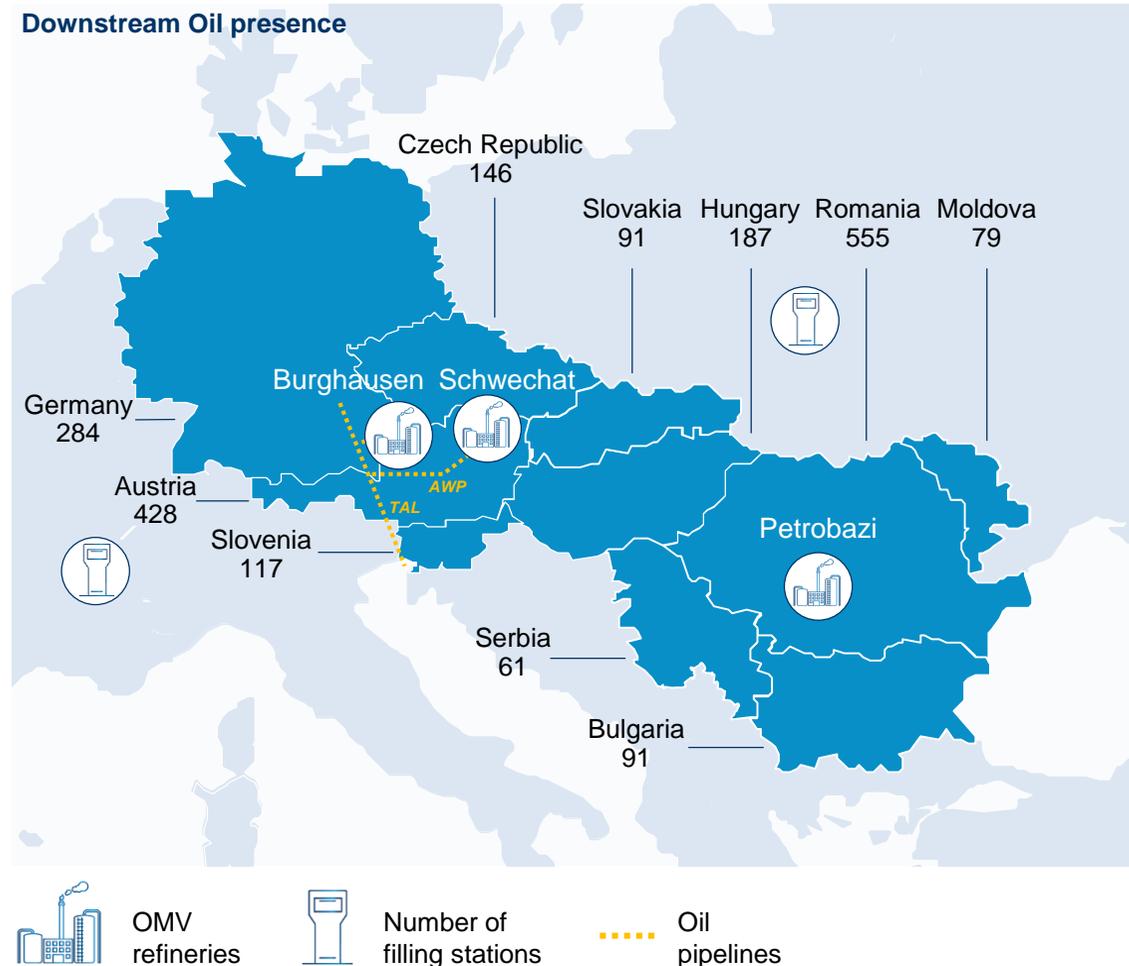
Intensifying partnership with the National Oil Corporation of Libya

- ▶ Excellent OMV position in Libya ("NOC partner of choice") with continuous engagement since 1975
- ▶ Recent expansion in the Sirte Basin

Downstream



Downstream Oil in a nutshell



2017 position

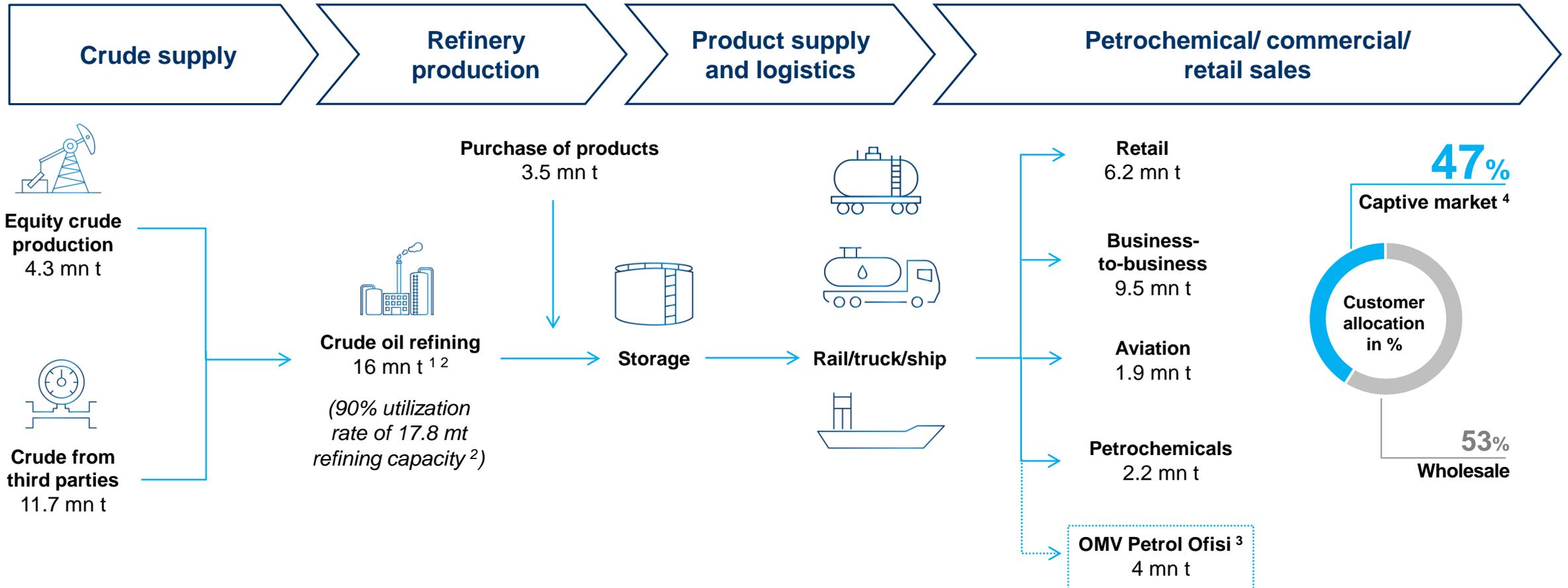
- ▶ **17.8 mn t** (325 kboe/d) annual **refining capacity** in Austria, Germany and Romania
- ▶ **2.5 mn t petrochemical production capacity**
- ▶ **36%** share in Borealis - leading polyolefin producer globally
- ▶ **~2,000 retail sites** in 10 countries

Competitive advantages

- ▶ **#1st quartile** European refiner¹ and olefin producer²
- ▶ 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



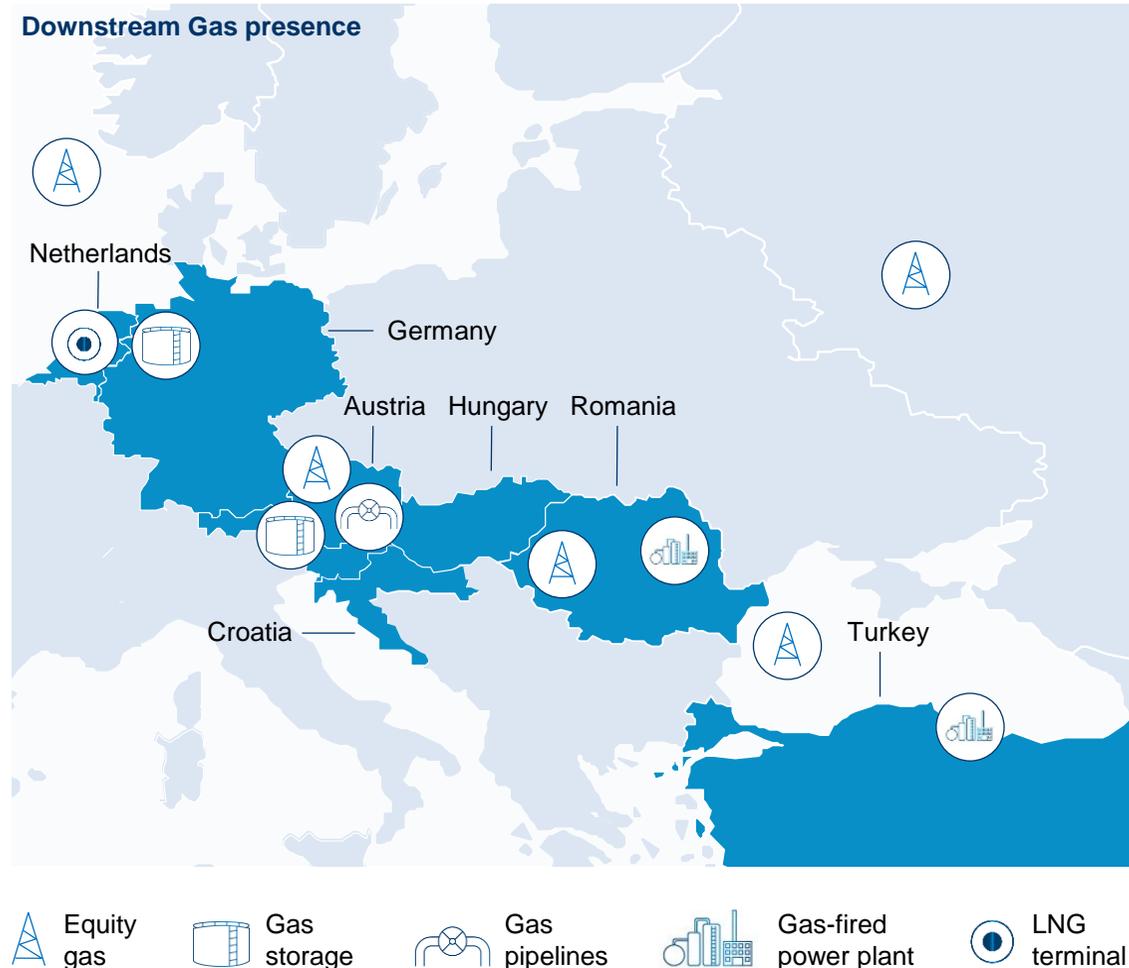
¹ Semi-finished products of 0.5 mt are not considered. 10% internal consumption not included.

² Impacted by turnaround in Schwechat

³ OMV Petrol Ofisi divested in June 2017

⁴ Retail and petrochemical sales

Downstream Gas in a nutshell



2017 position

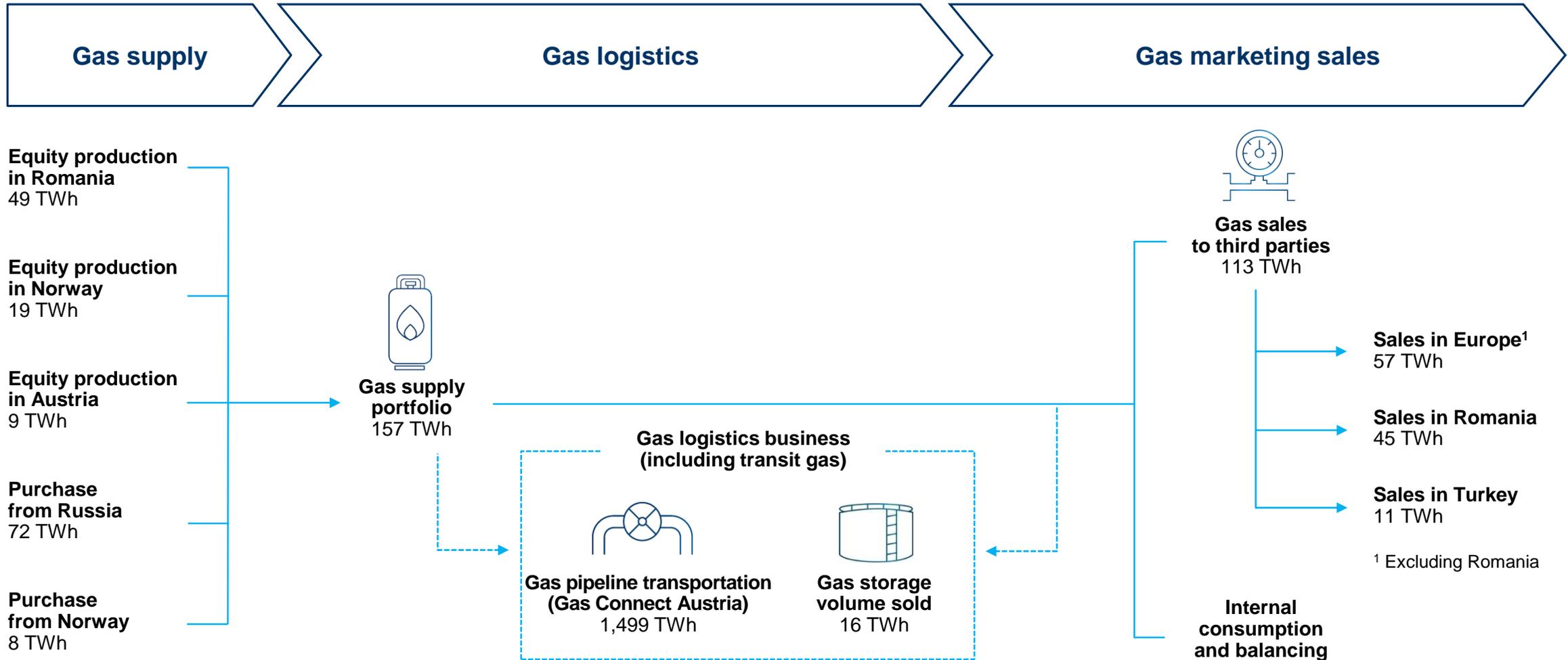
- ▶ ~ **11 bcm** natural gas sales, out of which ~70% equity supplied
- ▶ **51% share in Gas Connect Austria**, the Austrian pipeline operator
- ▶ **>3 bcm gas storage** capacities in Austria and Germany
- ▶ 1 LNG terminal in Rotterdam
- ▶ 2 gas-fired power plants in Romania and Turkey

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

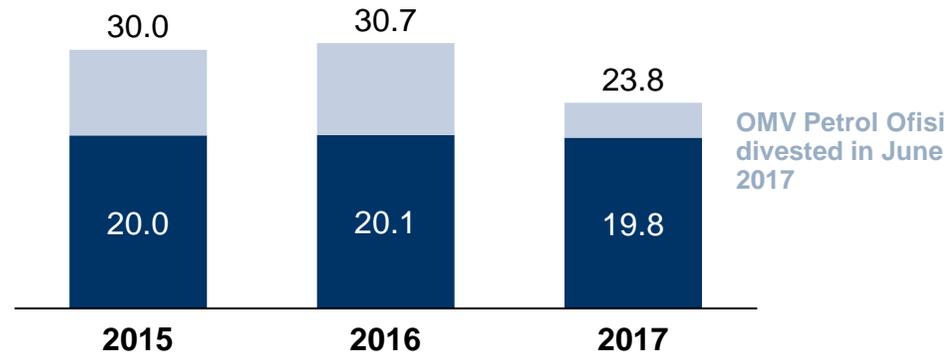
2017 figures



Best in class refinery utilization rate and stable sales

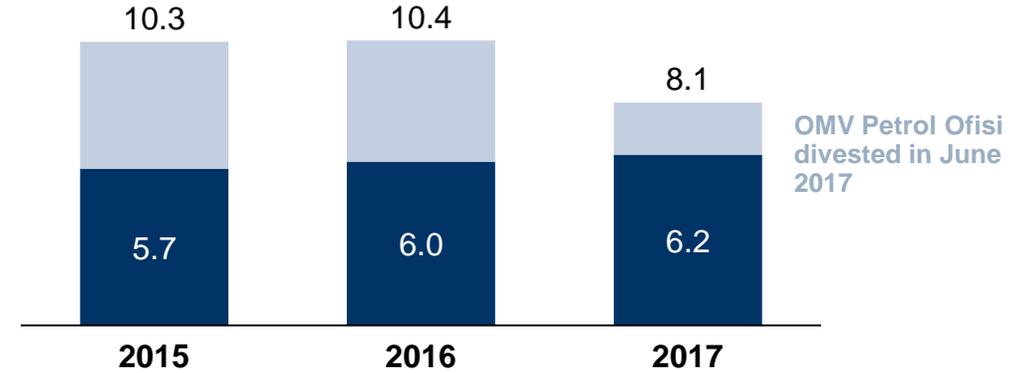
Refined product sales

mn t



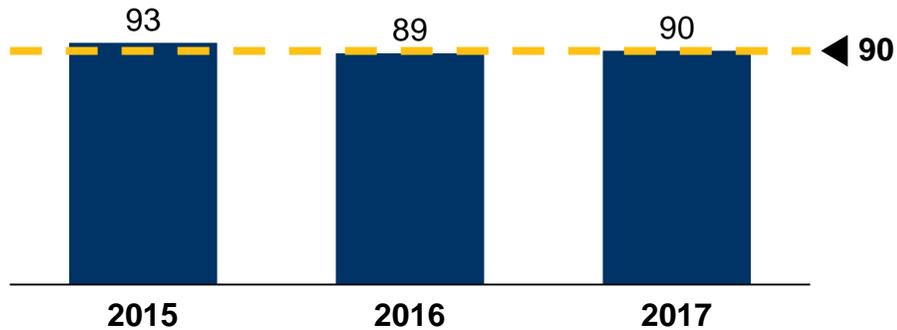
Retail sales

mn t



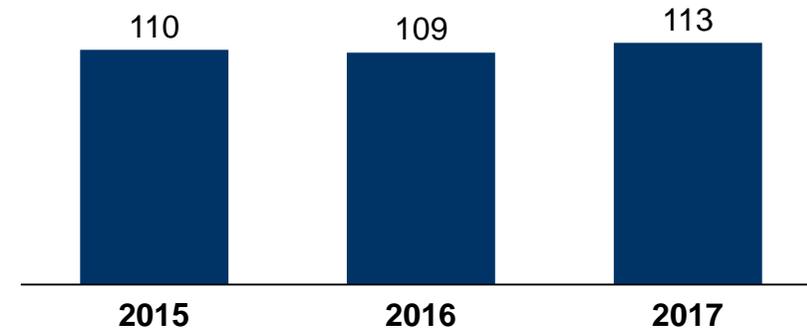
Refinery utilization rate

%



Natural gas sales

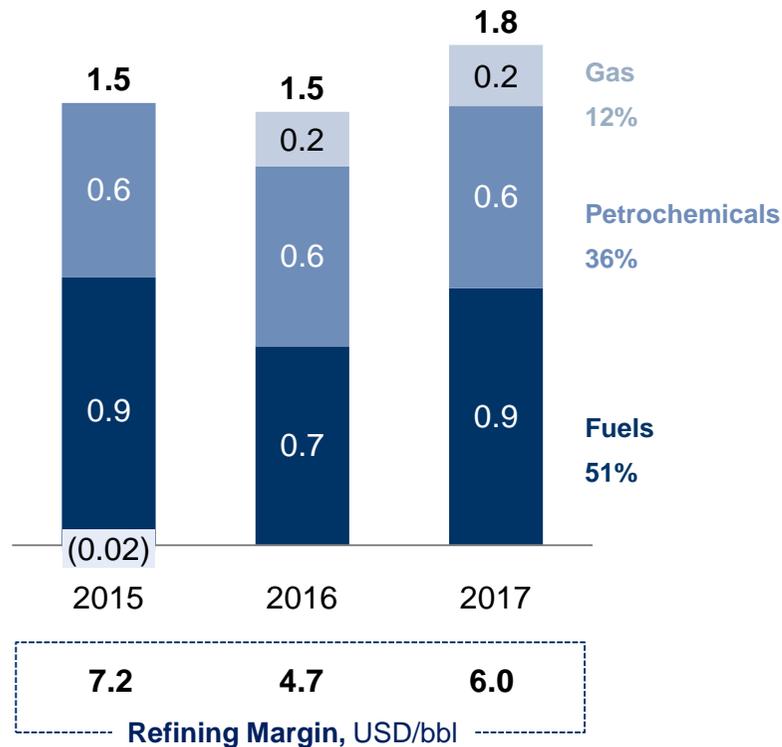
TWh



Strong contributor to OMV Group financials

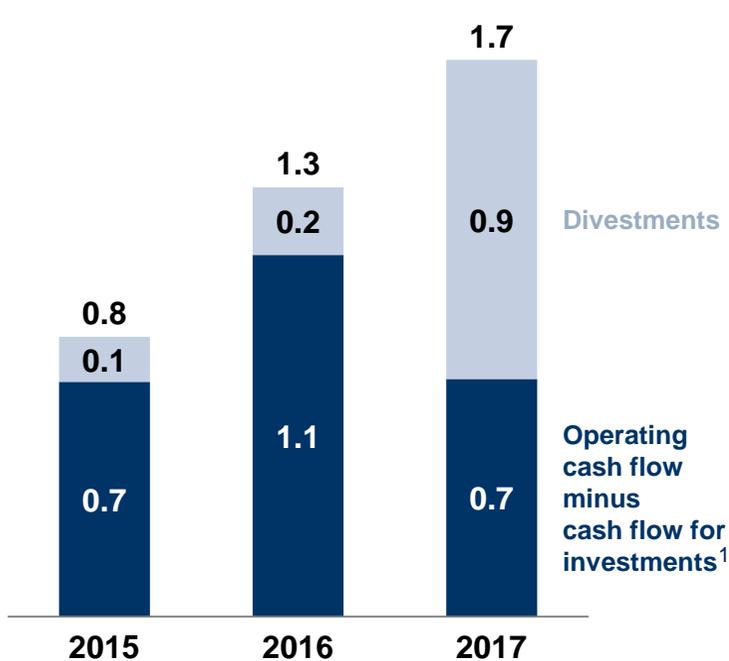
Improvement in operations

Clean CCS Operating Result, EUR bn



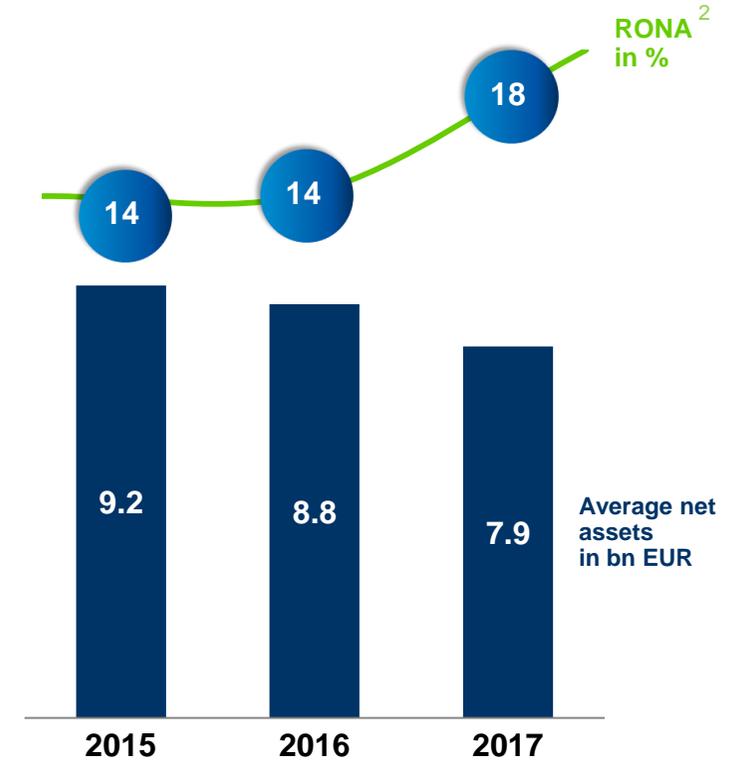
Strong cash flow generator

Free cash flow, EUR bn



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

Attractive returns



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

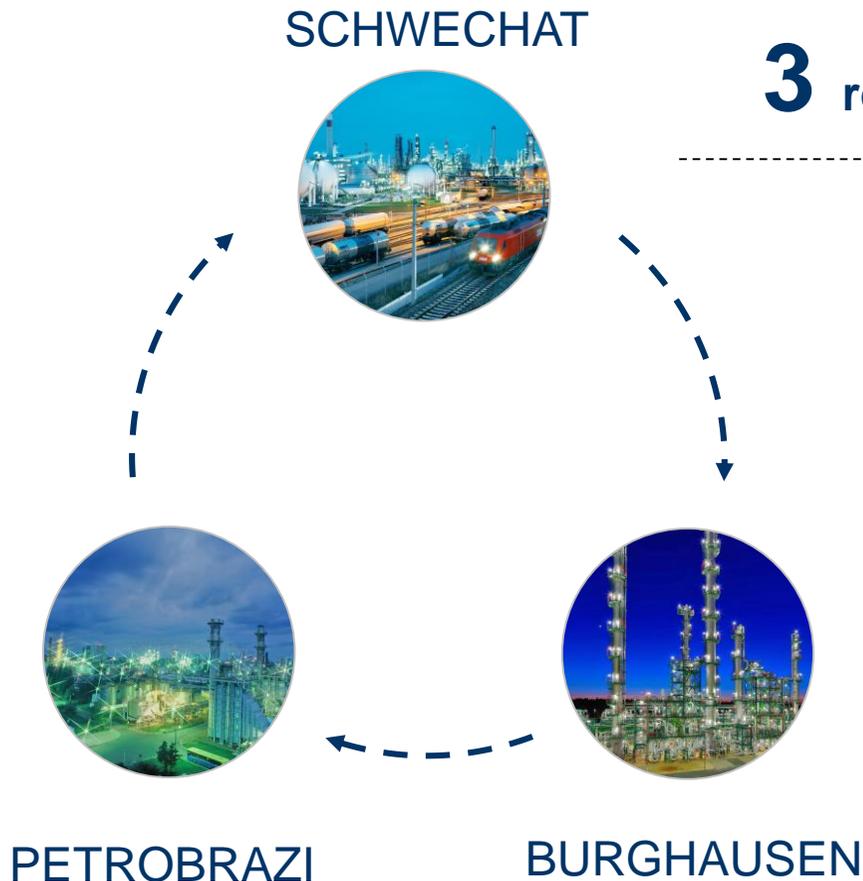
- ▶ Operational excellence
- ▶ Shift to higher value products
- ▶ Further increase captive sales channels
- ▶ Double gas sales volumes
- ▶ Stringent cost management

OMV will upgrade its European refining assets to market changes

	European market 2016 - 2025	OMV European production volume 2025	
		Change	2025 volumes
 Petrochemicals			2.8 mn t
 Fuels – Jet			1.9 mn t
 Fuels – Gasoline & Diesel			9.8 mn t
 Heavy Products			0.9 mn t

- ▶ **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 **Petrobrazil refinery**
- ▶ **Stable total refining** capacity of 17.8 mn t

Continuous efforts on operational excellence



3 refining sites = **1** integrated refinery concept

- ▶ 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**

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**

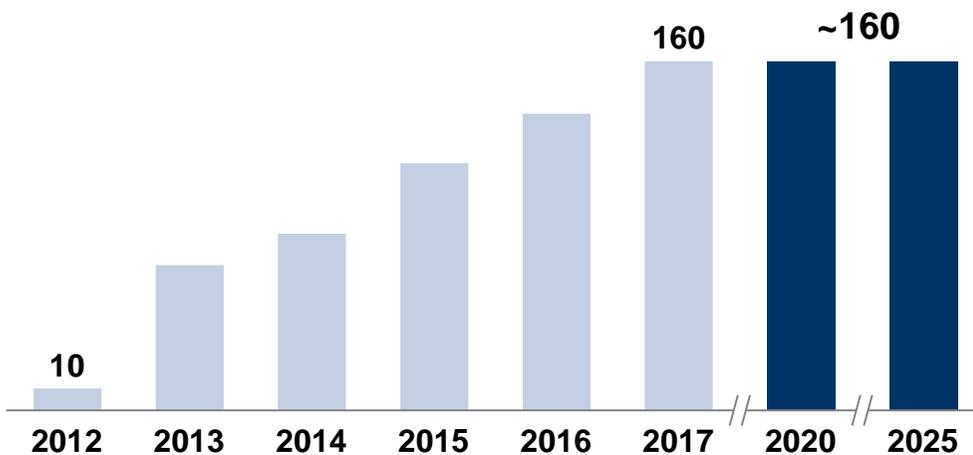
Avanti and Diskont

- ▶ ~10% of network
- ▶ Perceived as most competitive in pricing

Retail ambitions for the future

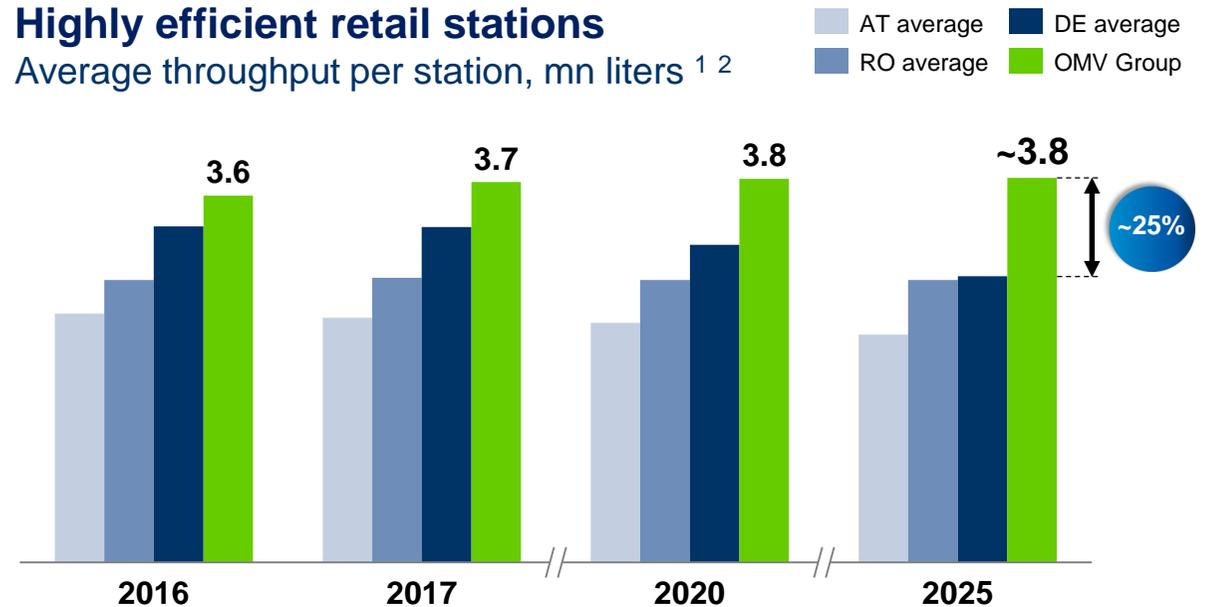
Profitability turnaround in last 6 years

Operating Result per filling station, EUR 1,000 ¹



Highly efficient retail stations

Average throughput per station, mn liters ^{1 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**

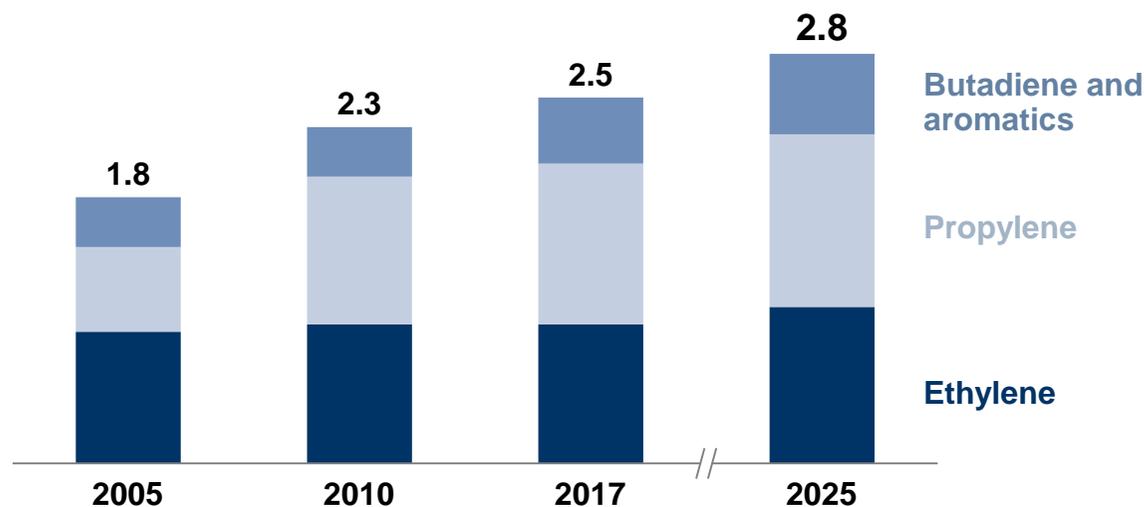
¹ Excluding OMV Petrol Ofisi

² Country averages. Source: Wood Mackenzie

Strong petrochemicals position in Europe and potential for future growth

Production capacity

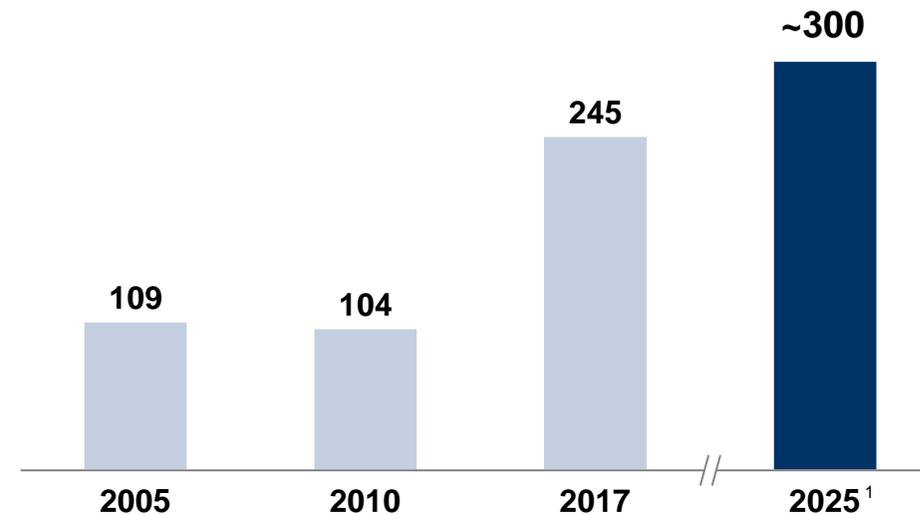
Mn t p.a.



- ▶ 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

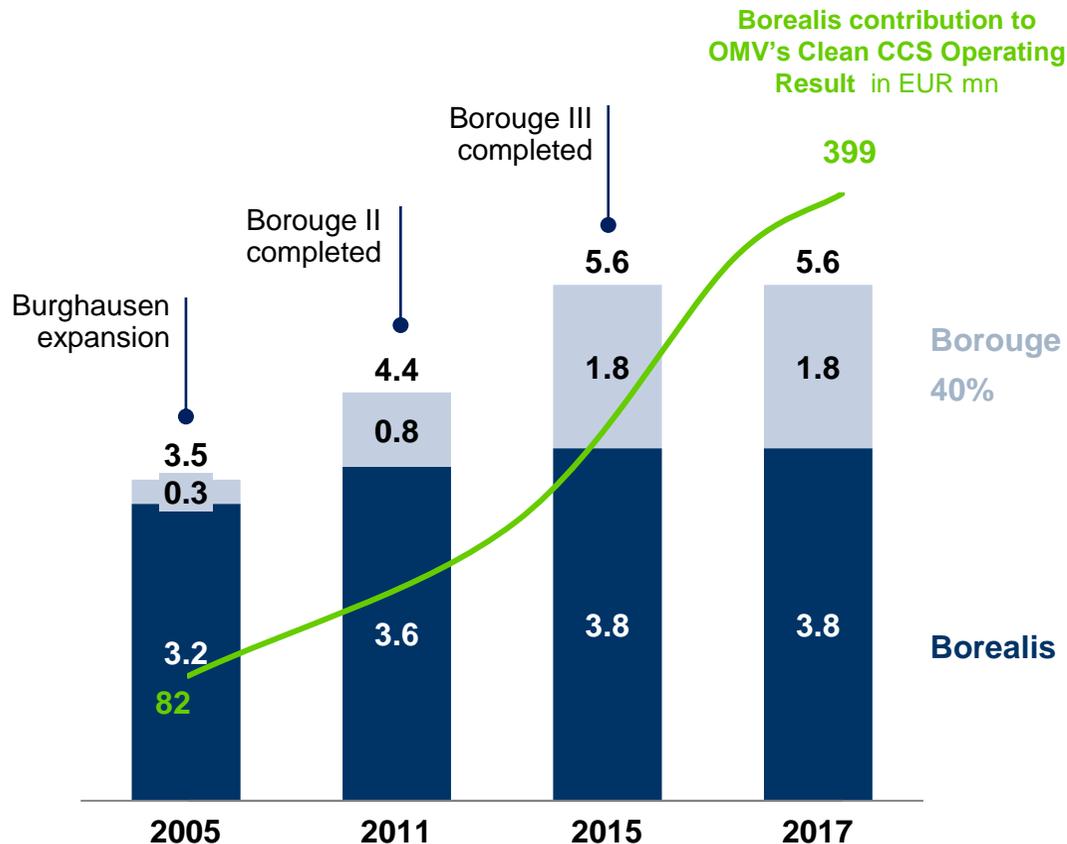


- ▶ Petrochemical projects under evaluation
 - ▶ Evaluate expansion in **Schwechat** together with Borealis
 - ▶ Evaluate potential for **Petrobrazil** refinery
 - ▶ Screen market for petrochemical opportunities

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.



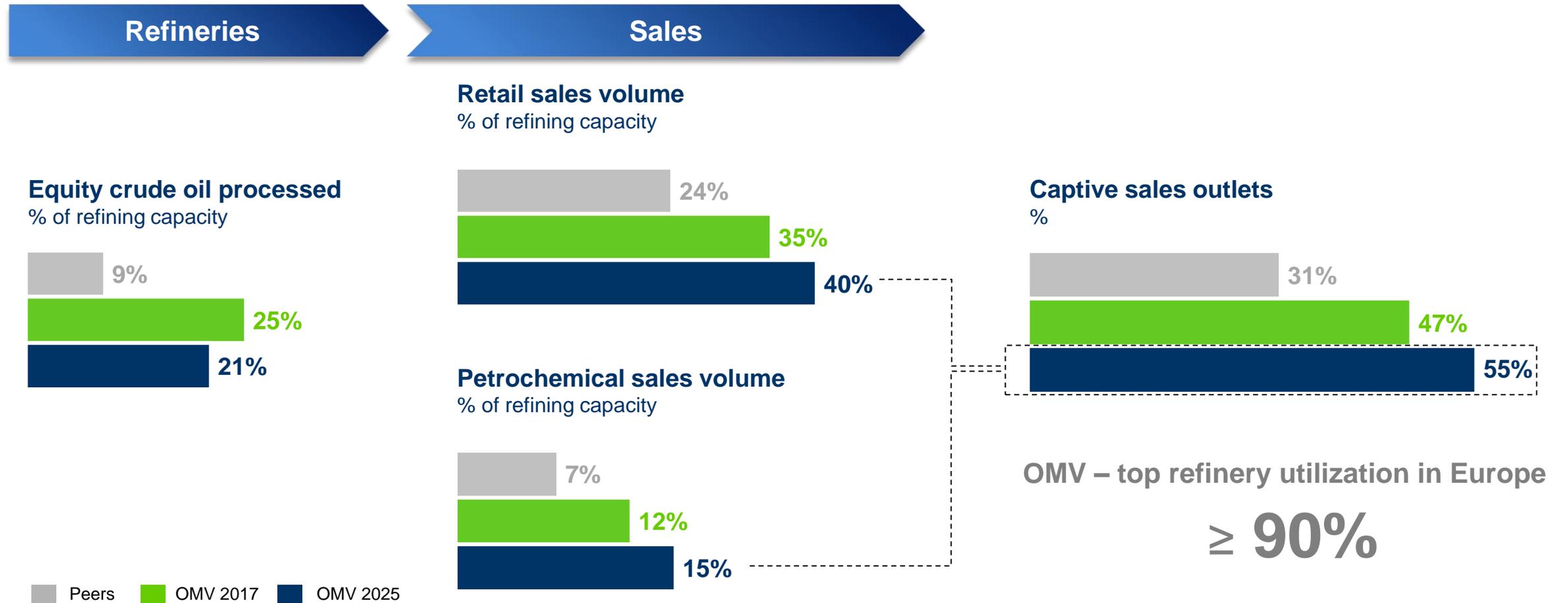
Borealis

- ▶ **#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

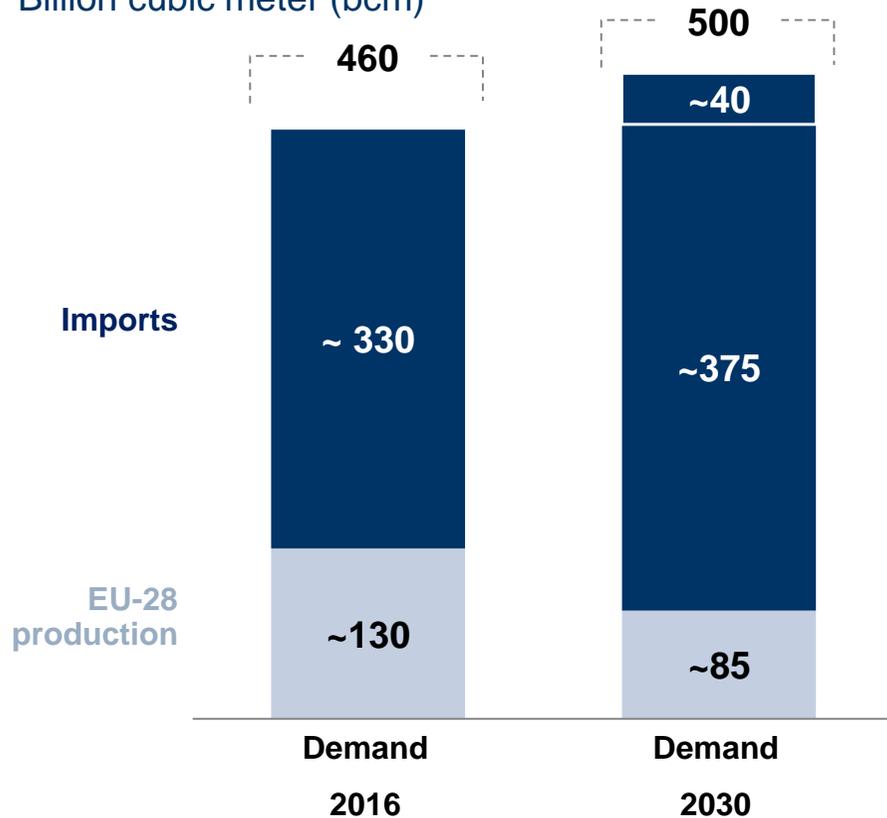


OMV in 2017 excluding OMV Petrol Ofisi
Peers: BP Europe, ENI Europe, Exxon Europe, Lotos, MOL, NIS, Phillips 66 Europe, PKN Orlen, Repsol Europe, Rompetrol, Shell Europe, Total Europe. Values as of 2016.

Europe needs more natural gas

EU-28 gas supply and demand

Billion cubic meter (bcm)



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

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



● Gas hub — Gas pipeline - - - Gas pipeline project Nord Stream 2

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

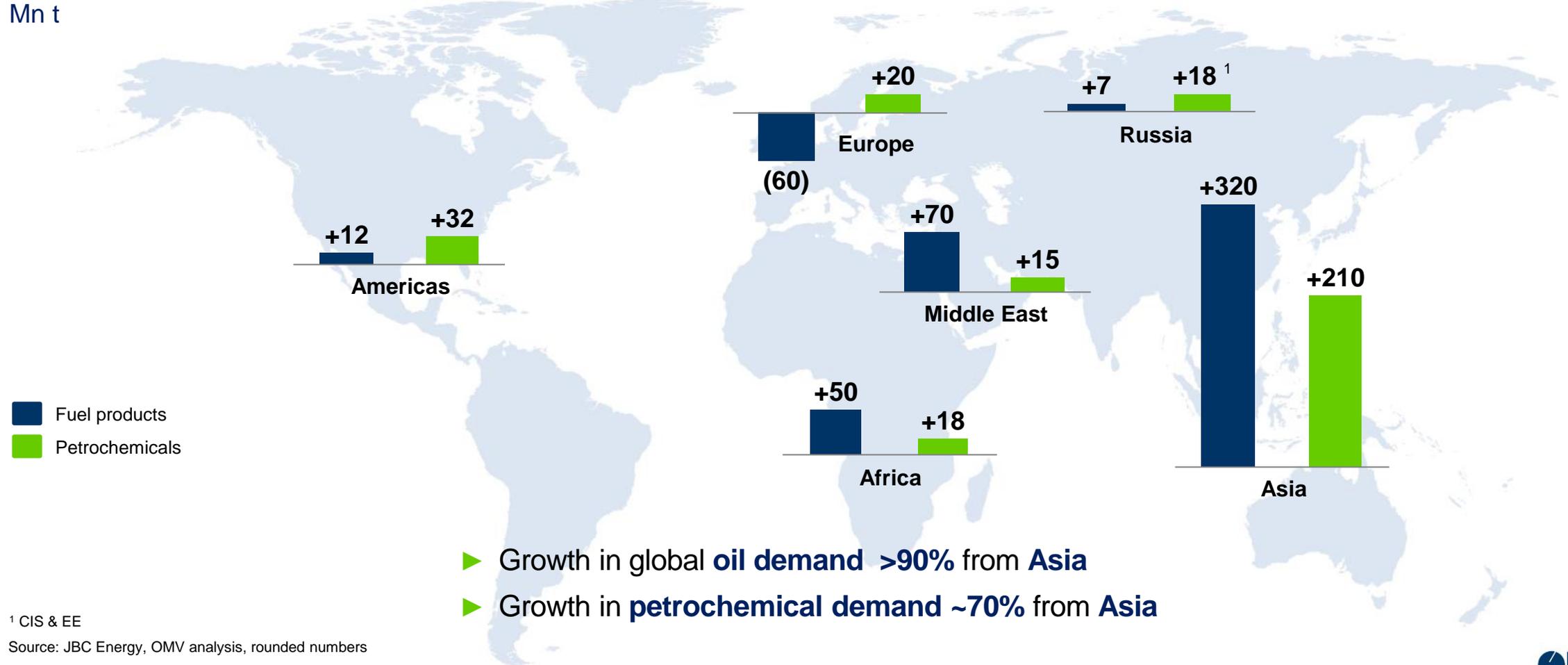
Acquisition budget
until 2025, EUR bn

~5

The majority of demand growth driven by Asia

Development of fuels and petrochemicals demand 2016 to 2030

Mn t



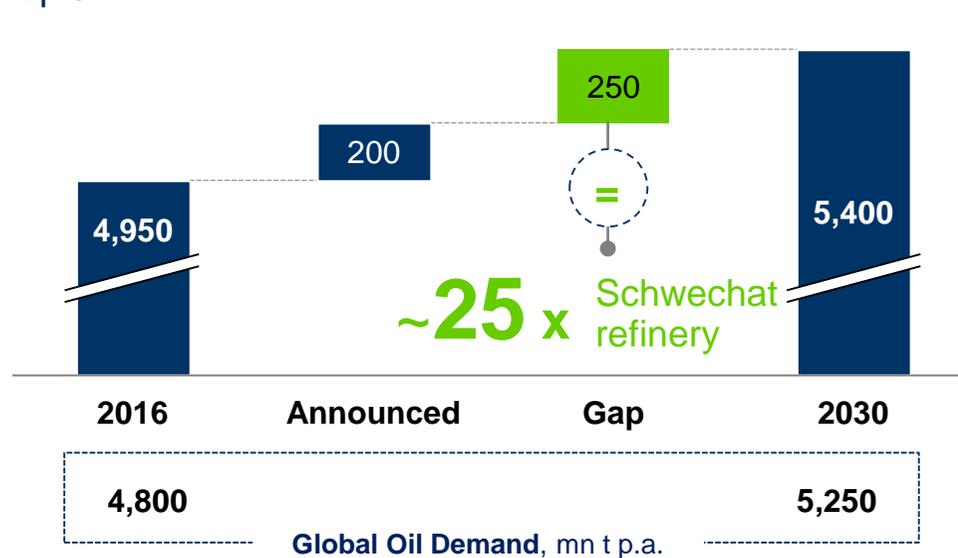
¹ CIS & EE

Source: JBC Energy, OMV analysis, rounded numbers

Increase in demand triggers substantial capacity additions

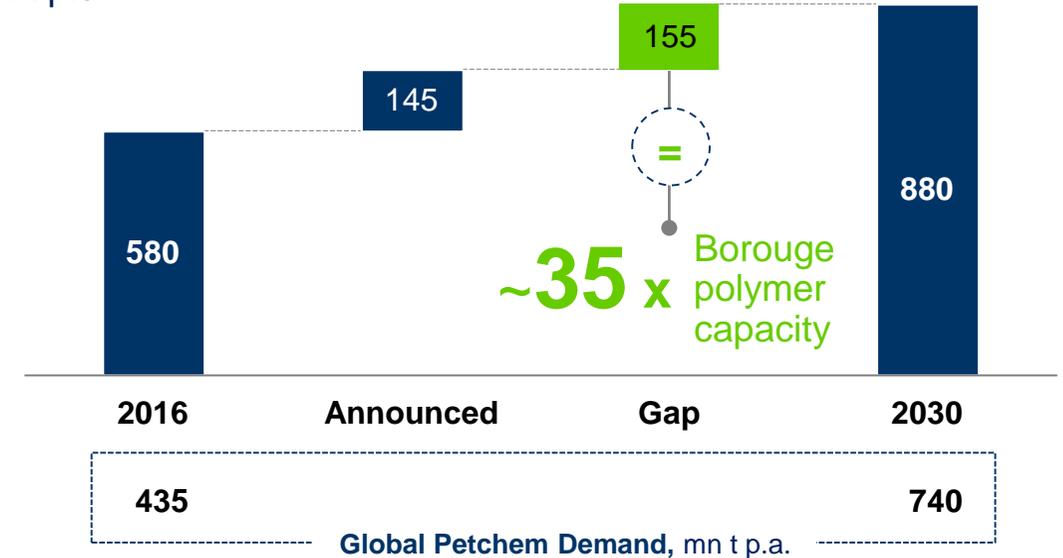
Global refinery capacity vs. demand ¹

Mn t p.a.



Petrochemicals capacity vs. demand

Mn t p.a.



- ▶ **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

- ▶ **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



Source: JBC Energy and OMV analysis

¹ Utilization calculated as crude throughput divided by refinery capacity

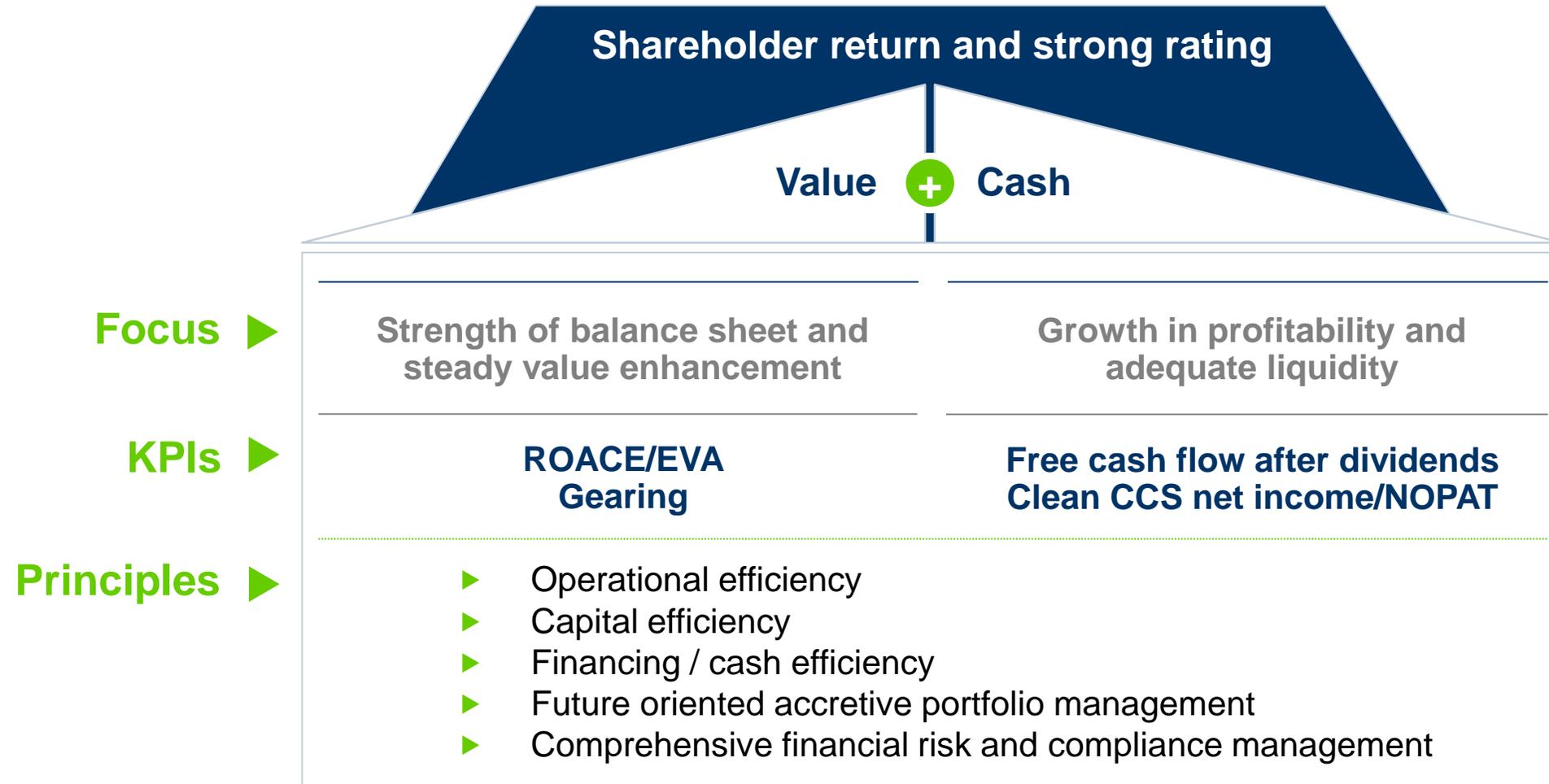
² Premium to the refining margin as a result of the Russian export duty system

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Financials



Financial steering framework



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 ¹

2018 - 2020

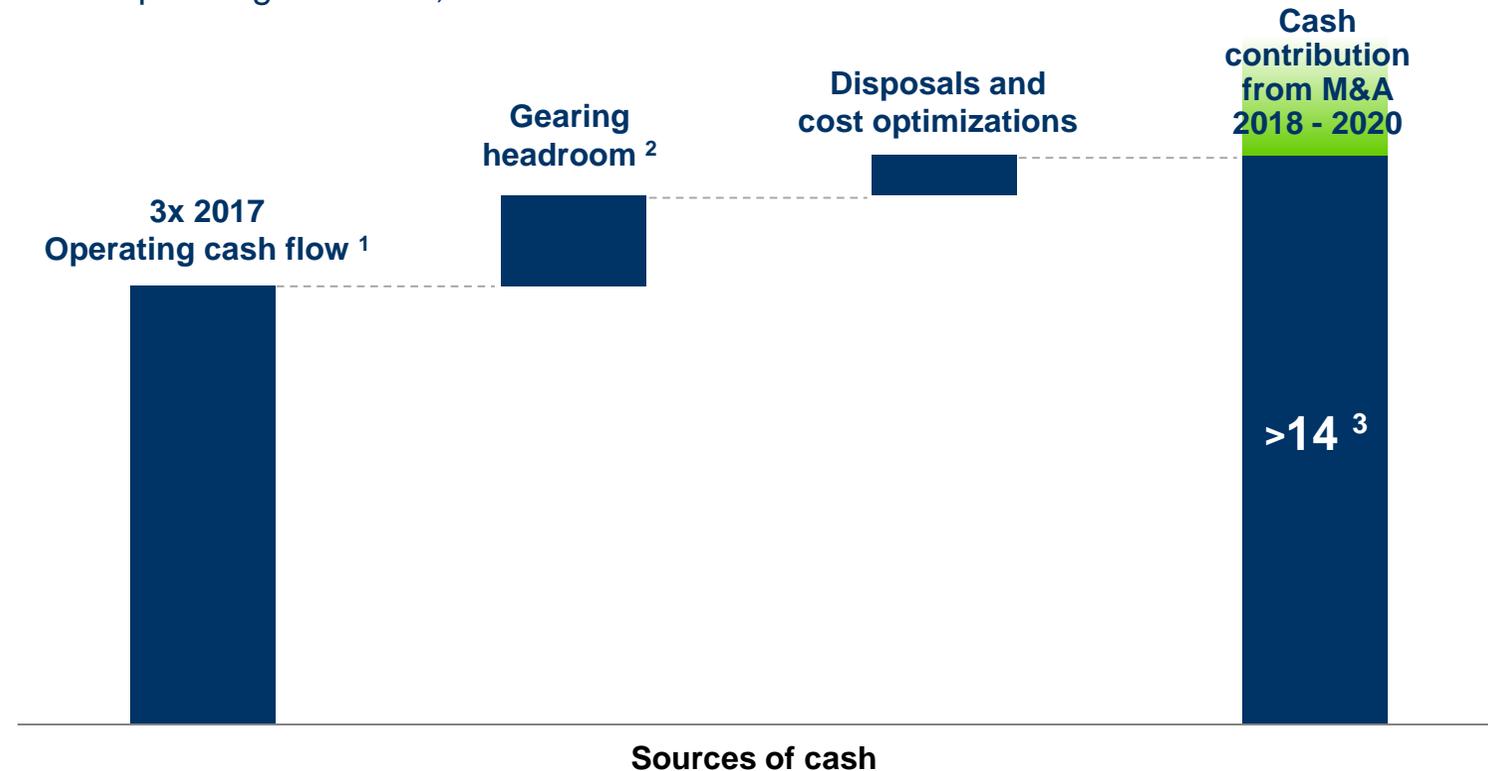
EUR mn
≥100

¹ Based on Operating Cost versus 2017 baseline according to OMV definition on a comparable basis

Funding the growth – mid term perspective

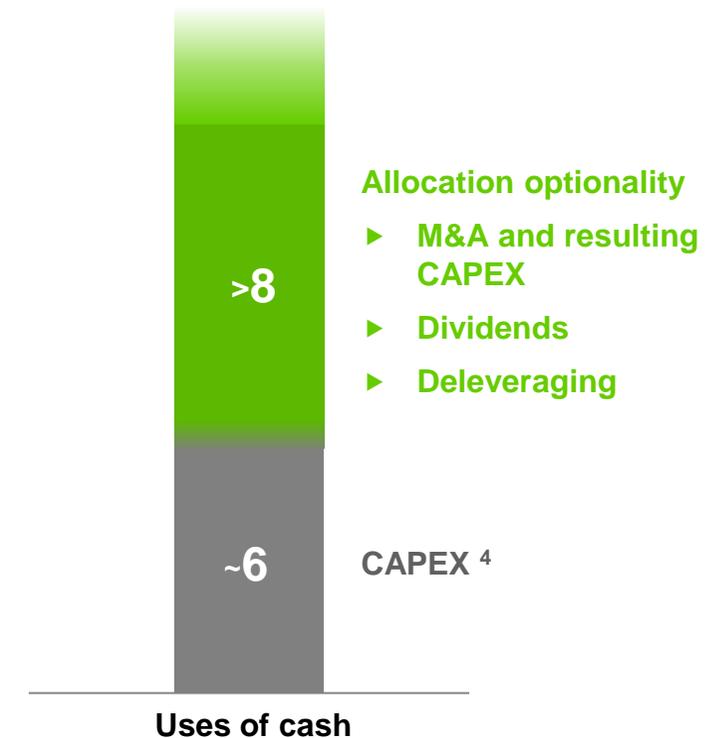
Sources of cash

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



Uses of cash

2018 - 2020, EUR bn



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

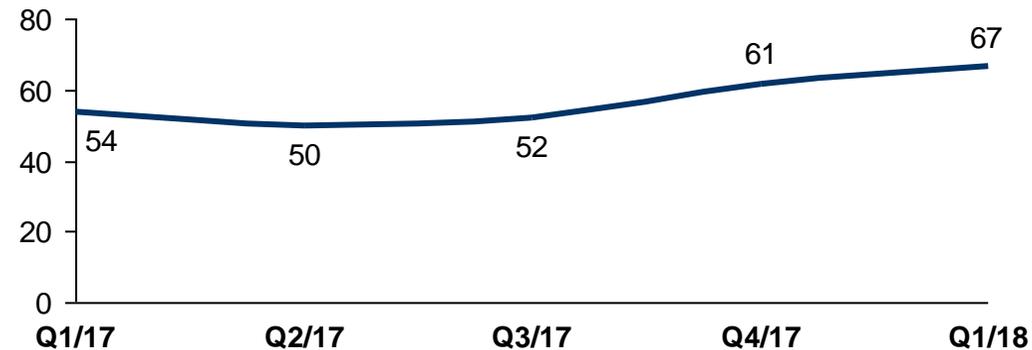
³ Three years sources based on 2017

⁴ CAPEX excluding purchase price acquisition CAPEX and contingent considerations

Development of economic environment

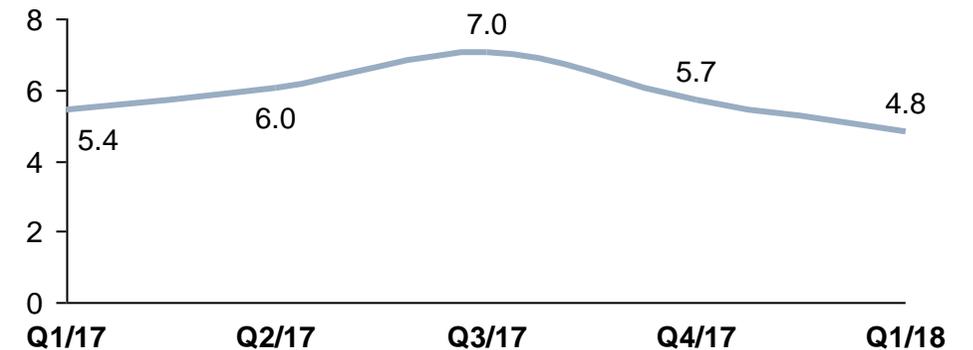
Oil price Brent

USD/bbl



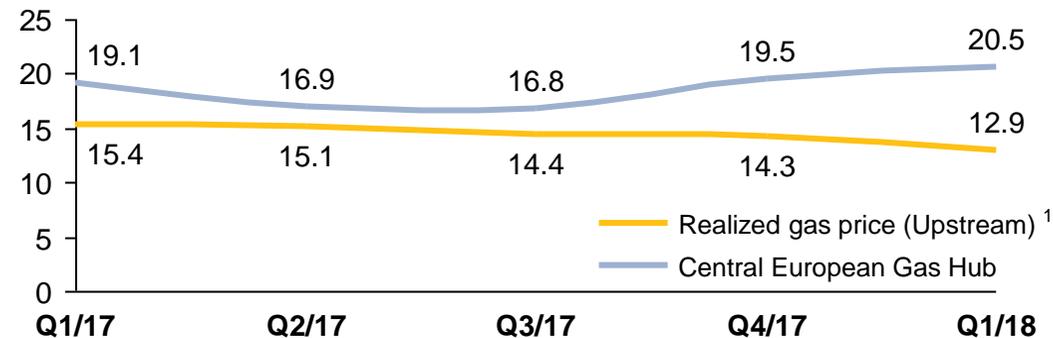
OMV indicator refining margin

USD/bbl



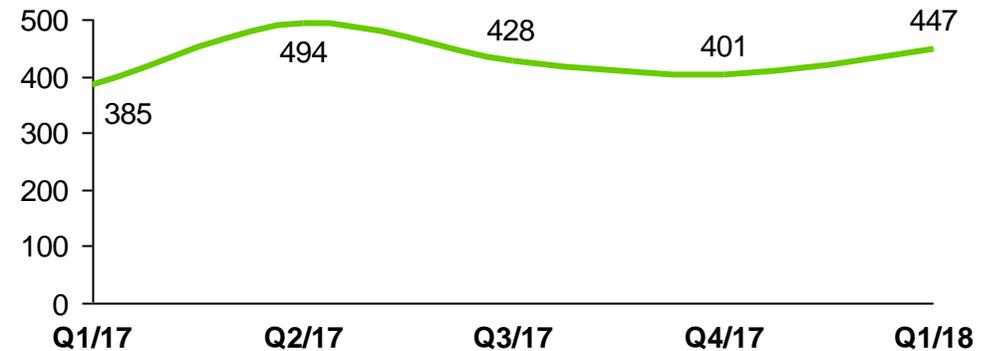
Gas prices

EUR/MWh



Ethylene/propylene net margin ²

EUR/t



Financial performance overview

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

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

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

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

in EUR mn	3m/18	2017	2016	2015	2014	2013
Clean CCS Operating Result ¹	818	2,958	1,535	1,737	2,418	2,815
Upstream	438	1,225	40	117	1,641	2,098
Downstream	376	1,770	1,533	1,546	812	755
Corporate and Other	0	(16)	(50)	(43)	(48)	(46)
Consolidation	4	(21)	12	116	13	7

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

Annual impact in EUR mn

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

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.

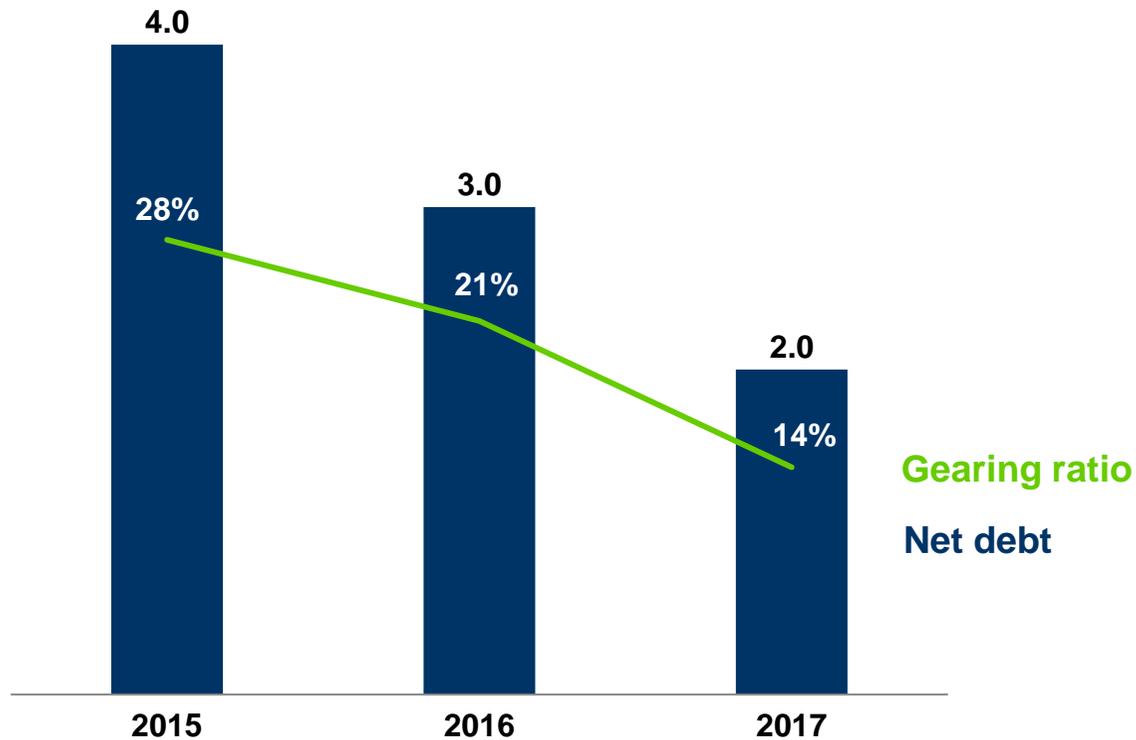
Cash flow

in EUR mn	3m/18	2017	2016	2015	2014	2013
Net income	531	853	(183)	(1,255)	527	1,729
Depreciation, amortization and impairments incl. write-ups	450	1,941	3,784	5,153	3,165	2,289
Change in net working capital components	(122)	(424)	(148)	(400)	405	647
Other	217	1,078	(575)	(664)	(431)	(541)
Cash flow from operating activities	1,076	3,448	2,878	2,834	3,666	4,124
Cash flow used for investments	(560)	(3,596)	(2,141)	(3,066)	(3,910)	(4,816)
Cash flow from disposals	22	1,830	344	193	516	835
Free cash flow	538	1,681	1,081	(39)	272	142
Dividends paid	0	(668)	(466)	(530)	(650)	(627)
Free cash flow after dividends including non-controlling interest changes	538	1,013	1,105	(581)	(401)	(619)

Strong financial footing

Net debt and gearing ratio

EUR bn



Cash position
EUR bn ¹

4.0

Target long-term
gearing ratio

≤30%

Undrawn revolving
credit facilities
EUR bn ¹

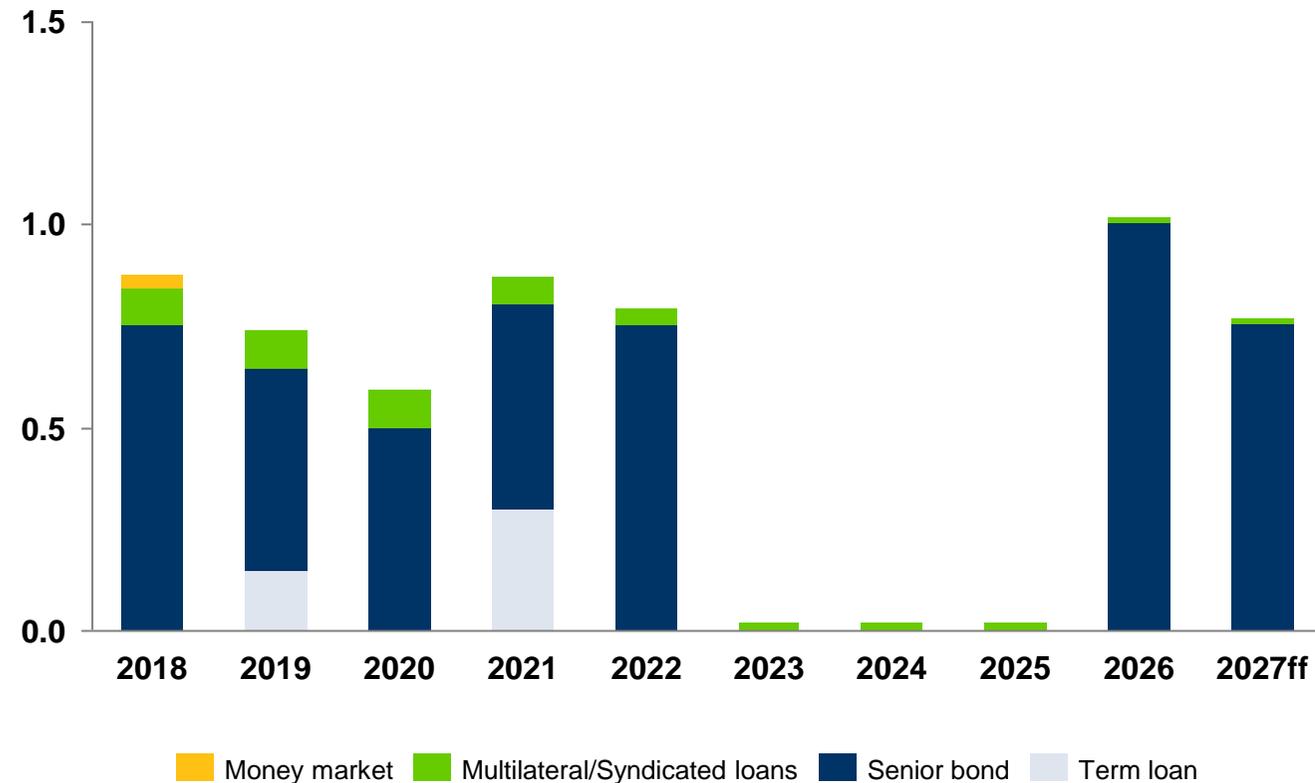
3.5

¹ As of end 2017

Balanced maturity profile

Maturity profile

EUR bn



Strong investment grade rating

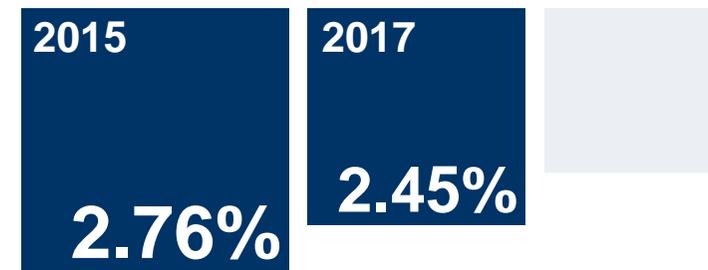


A3
Outlook stable
May 21, 2018



A-
Outlook stable
Feb 12, 2018

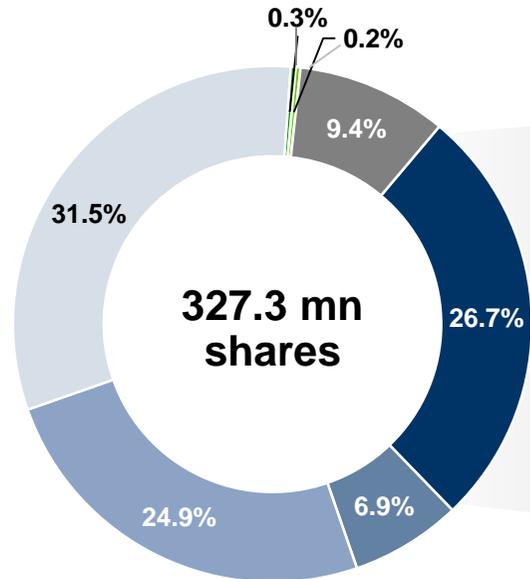
Financing costs ¹



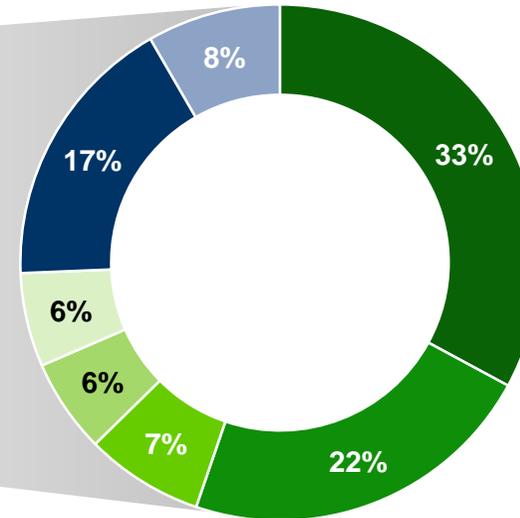
¹ Weighted average interest rate of OMV Group's long-term interest-bearing debt at year-end

Diversified international shareholder base

Shareholder structure ¹



Geographical distribution of institutional investors ¹



**Institutional investors
26.7%**

- Institutional investors
- Unidentified free float
- IPIC/Abu Dhabi
- Retail Ownership / Brokerage and Trading Accounts
- ÖBIB
- Employee share programs
- Treasury shares

- United States
- United Kingdom
- France
- Rest of World
- Austria
- Germany
- Rest of Europe

¹ As of March 2018

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Sustainability



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

Safety first

Lost Time Injury Rate

(23)%

2017 vs 2014

Process safety events

(74)%

2017 vs 2014

**ZERO Harm
NO Losses**

Carbon efficiency

Carbon intensity

GHG emissions per unit

OMV Operations

(15)%

2016 vs 2010

External product sales ¹

stable

2016 vs 2010

(19)%

2025 ² vs 2010

Zero routine flaring

(4)%

2025 ² vs 2010

Focus on natural gas

Recognition



FTSE4Good



2017 Constituent
MSCI ESG
Leaders Indexes

Highest ranking for
ESG
performance from MSCI ³
for the last 5 years

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.

Where we concentrate our efforts



OMV Sustainability Strategy

Focus Areas

Commitments



Health, Safety, Security and Environment

- ▶ Health, safety, security and environmental protection have **top priority** in all activities
- ▶ **HSSE vision** of “ZERO harm - NO losses”



Carbon Efficiency

- ▶ Commitment to **climate change mitigation** and responsible resource management
- ▶ Measures to improve carbon efficiency of **operations and product portfolio**



Innovation

- ▶ Focus on **optimizing production, exploring high-end petrochemical solutions, developing innovative energy and embracing digital technologies**
- ▶ **Investment and partnerships** in innovation, research and development



Employees

- ▶ **Building and retaining** a talented and competent **team**
- ▶ Group **diversity strategy** with focus on gender and internationality



Business Principles and Social Responsibility

- ▶ **High compliance standards** at all locations
- ▶ Commitment to the **UN Global Compact**, the **UN Guiding Principles on Business and Human Rights** and the **UN's 2030 Agenda for Sustainable Development**

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.



FTSE4Good

- ▶ 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”.

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OMV