OMV results
January – June and Q2 2013

August 13, 2013

OMV Aktiengesellschaft

Moving more. Moving the future. OMV

Strategic highlights and results January – June 2013

Gerhard Roiss, Chairman of the Executive Board and CEO

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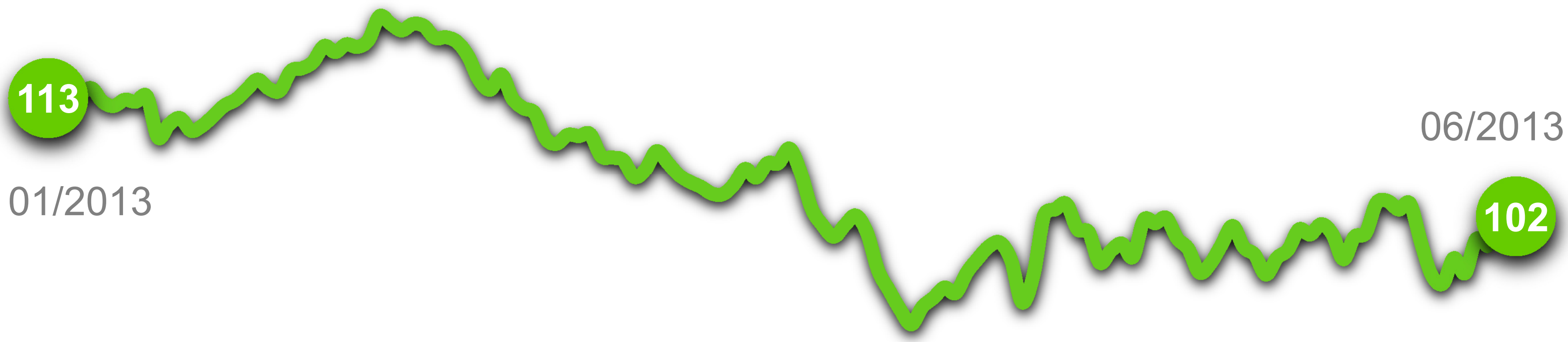
Market environment 6m/13

Brent oil price
in USD/bbl



Oil price: **Decreasing** to average USD 108/bbl (6m/12:114)

Operating environment: **Instability** in Middle East and North Africa

Gas prices: **Ongoing spread** spot vs. long-term

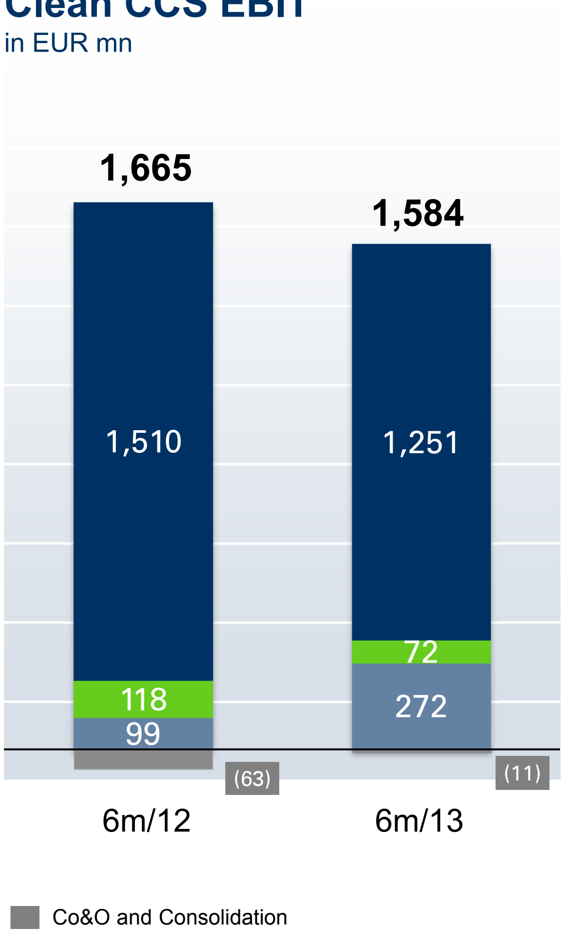
Refining margins: Volatile at **lower level**

Highlights in 6m/13

1.6	EUR bn free cash flow after dividends (6m/12: EUR 194 mn)
~1	bn boe E&P project pipeline
up to 6	bcm p.a. Neptun potential gas production, OMV Petrom share 50%
6	new exploration licenses awarded in Norway
870	MW new gas-fired power capacity on stream

Financial performance in 6m/13

Clean CCS EBIT
in EUR mn



(17)%

Exploration and Production

Production decrease to 299 kboe/d (6m/12: 302) and Brent price down to USD 107.5/bbl (6m/12: 113.6)

(39)%

Gas and Power

EconGas significantly burdened by negative gas margins: persisting spread between oil-linked gas supply and hub-priced sales as well as a very competitive market environment

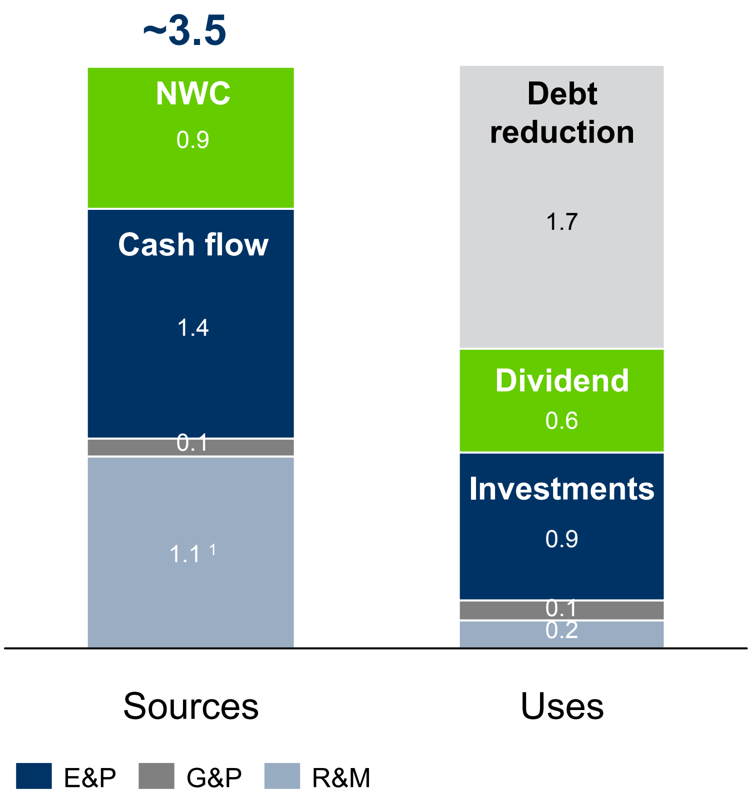
+174%

Refining and Marketing

Refinery utilization at 91% (+8%) and strong performance of marketing business

Solid financial basis for growth

6m/13, in EUR bn

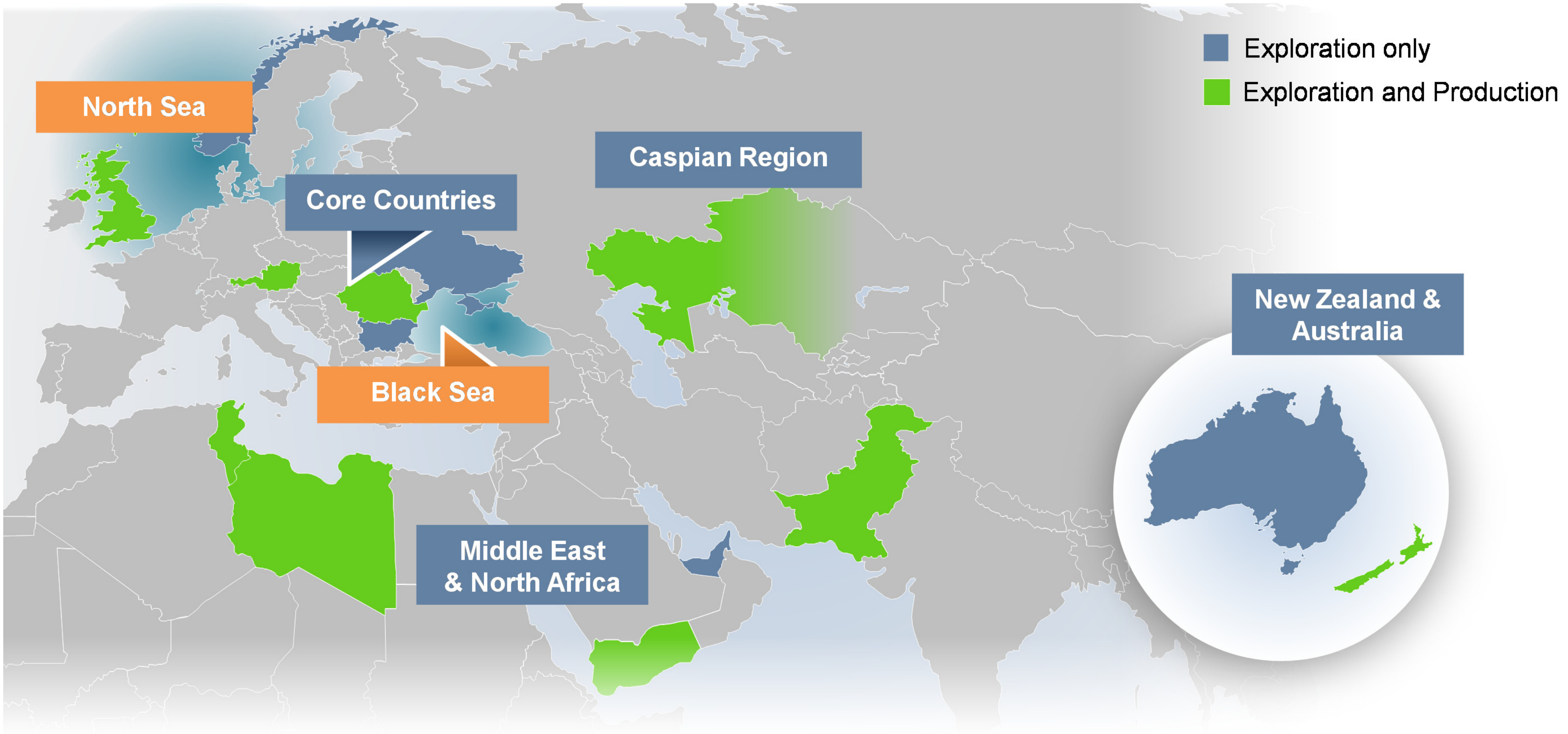


- Group CAPEX 6m/13: EUR **1.1 bn** thereof **75%** in E&P
- **EUR 0.9 mn** net working capital reduction
- Gearing ratio down from 26% (2012) to **15%** (June 2013)

"Source E&P / G&P / R&M" = Source of funds, including divestments. | "Use E&P / G&P / R&M" = Invest cash flow excluding divestments.
"Debt reduction" = Financing cash flow and change of net cash of the period. | NWC = Net Working Capital.

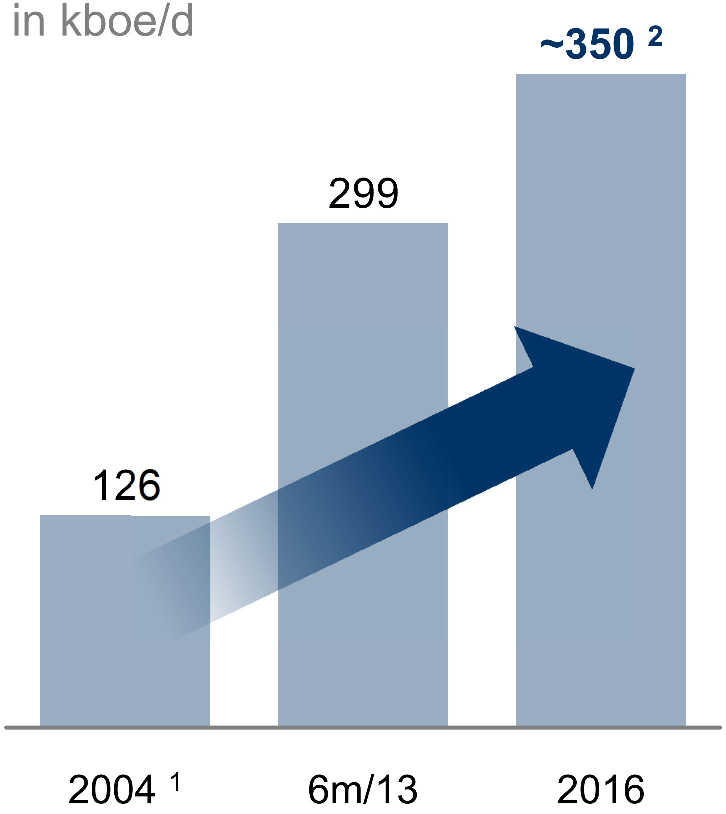
[1] Including effects from sale of R&M's Austrian stockholding business in Q1/13.

Focus on upstream activities



Grow Upstream to 350 kboe/d

OMV Production
in kboe/d



1 Before Petrom acquisition.
2 Organic, excl. acquisitions.

- **Production in core countries stabilized at 208 kboe/d**

Growth:

- **>2/3** of Group CAPEX in E&P
- **~1 bn boe** project pipeline; increased **exploration activities**
- **Black Sea:** 3D seismic Neptun completed
- **North Sea:** FID Aasta Hansteen, six new exploration licenses awarded

Optimize Downstream

R&M:

- Executed divestments:
  - Marketing businesses in **Bosnia-Herzegovina and Croatia**
  - **Lubricants business**
- **EUR 1.4 bn cash generation** in 6m/13
  - Strong operating cash flow
  - Several working capital reduction measures

G&P:

- **Renegotiations** with Gazprom and Statoil **progressed**
- Start-up of **gas-fired power plant Samsun**

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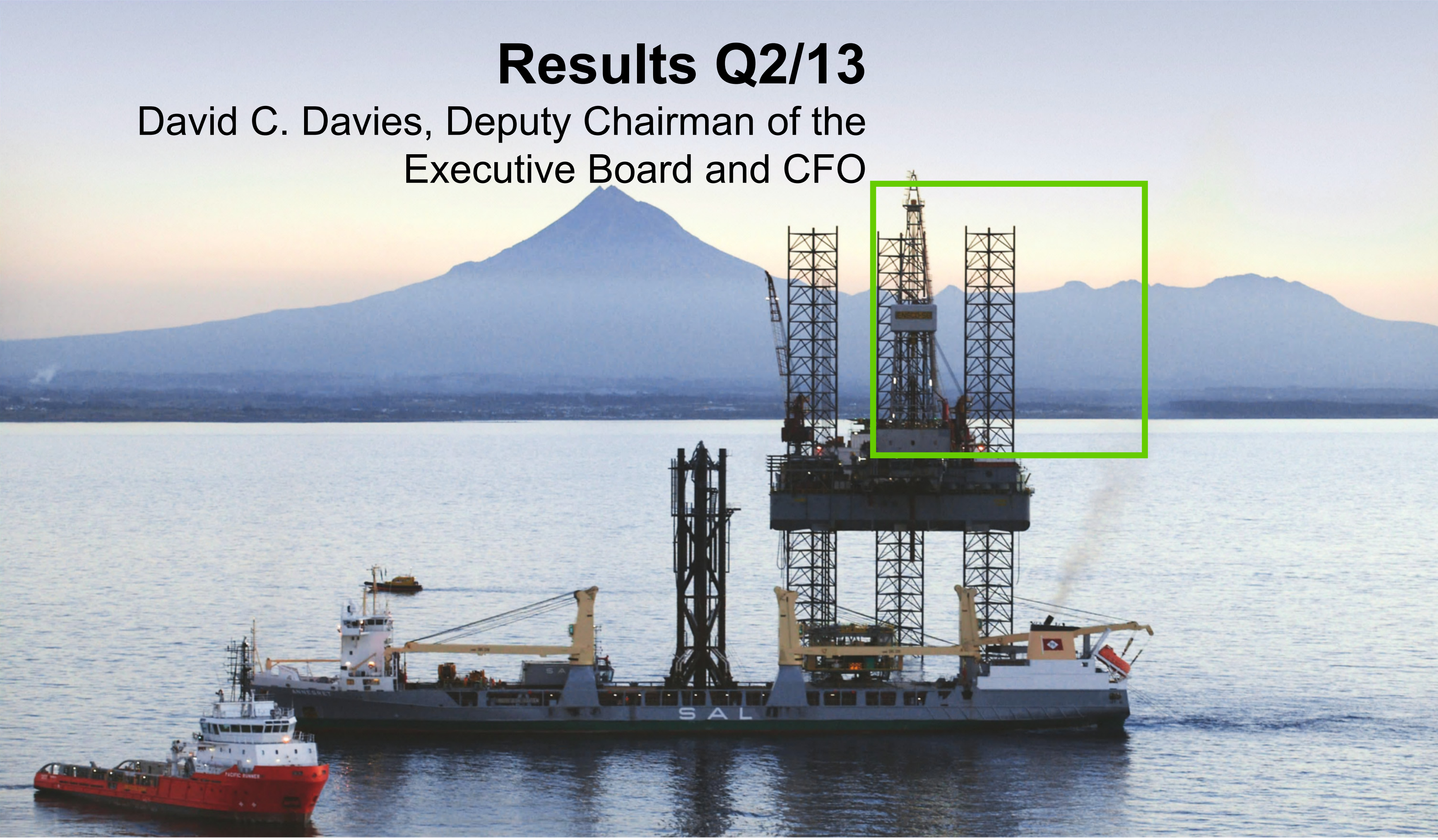
Results Q2/13

David C. Davies, Deputy Chairman of the Executive Board and CFO



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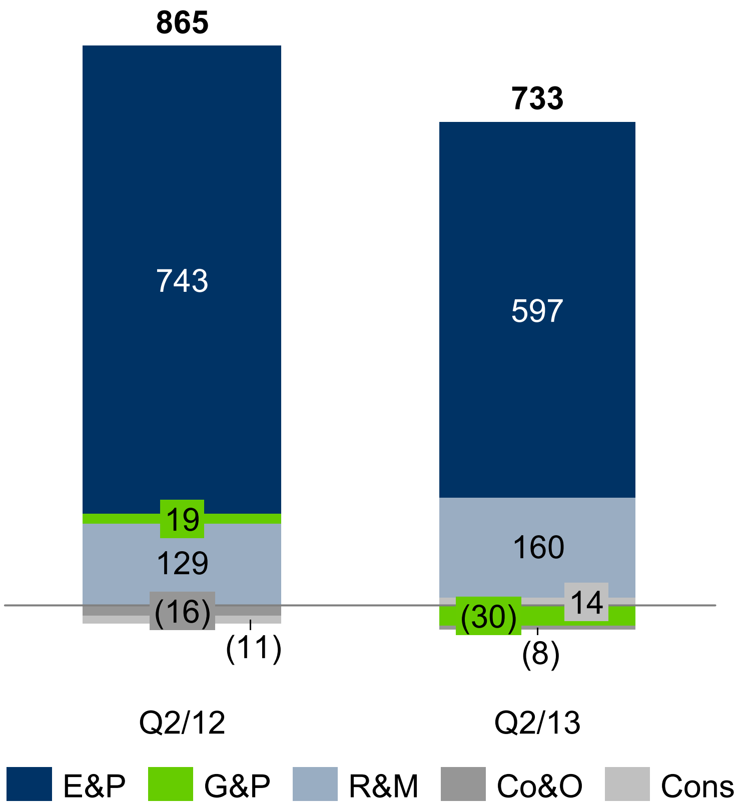
Q2/13 Highlights

Clean CCS EBIT in EUR mn



- Average Brent oil price at USD 102/bbl, down by 5%
- Production at 297 kboe/d
- Lower liftings mainly in Libya
- G&P burdened by negative EconGas performance
- Increased refining result at Petrom driven by higher volumes and lower costs
- Strong marketing results due to improved margins and lower costs
- Gearing ratio decreased to 15%

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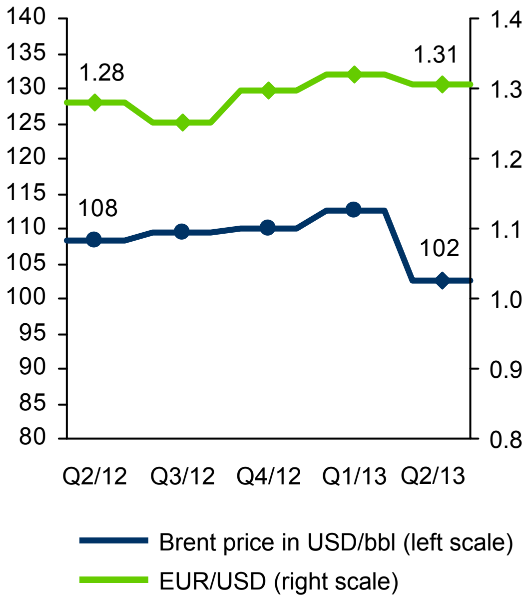
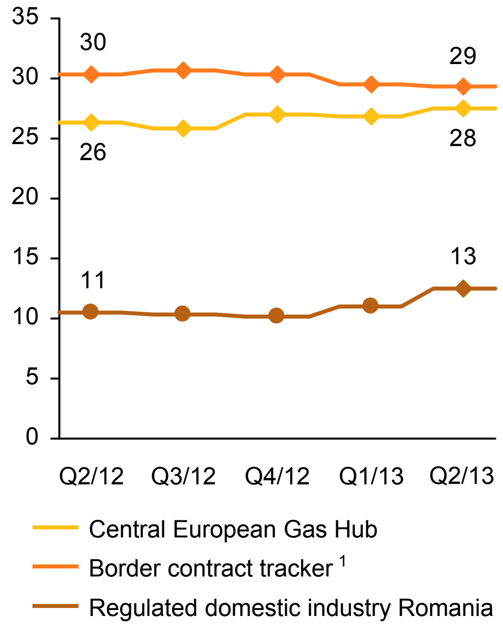
Economic environment

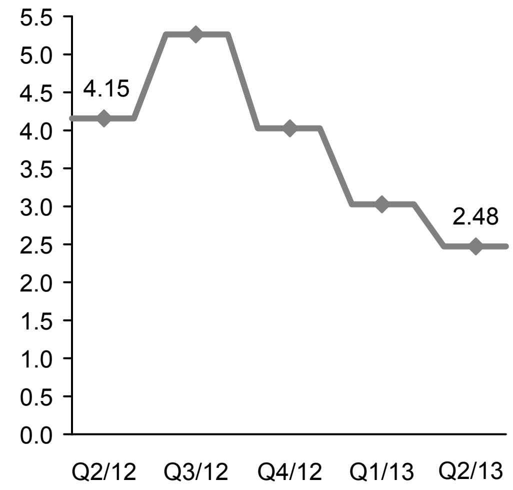
Oil price and EUR/USD



Gas prices in EUR/MWh



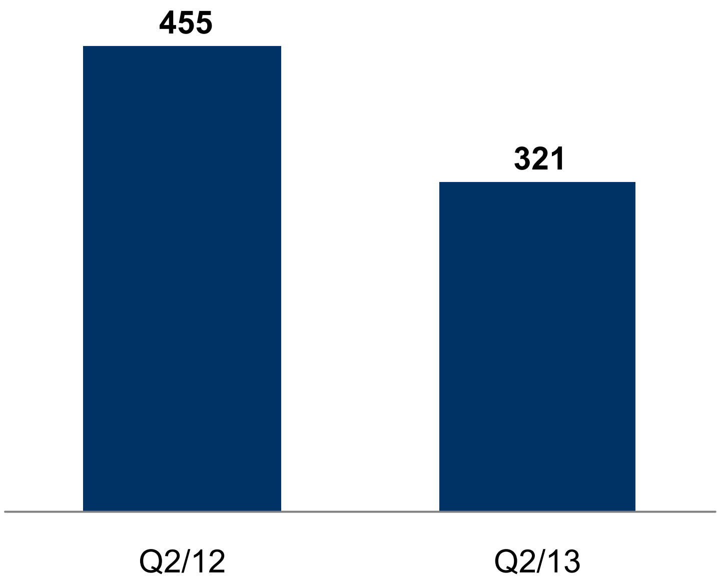
OMV indicator refining margin in USD/bbl



[1] IHS CERA's proxy for an mainly oil-linked contract gas price in northwestern Europe.
Note: All figures are quarterly averages.

Results in Q2/13

Clean CCS net income attributable to stockholders in EUR mn [1]



in EUR mn	Q2/13	Q2/12	△
EBIT	**667**	**621**	**7%**
Financial result	(109)	(26)	n.m.
Taxes	(216)	(236)	(9)%
Effective tax rate	39%	40%	(3)%
Net income	343	360	(5)%
Minorities and hybrid capital owners	(117)	(76)	54%
Net income attributable to stockholders [1]	**226**	**283**	**(20)%**
EPS (in EUR)	0.69	0.87	(20)%
Clean EBIT	666	761	(12)%
Clean CCS EBIT	**733**	**865**	**(15)%**
Clean CCS net income attributable to stockholders [1]	**321**	**455**	**(29)%**
Clean CCS EPS (in EUR)	0.99	1.39	(29)%

Figures in this and the following tables may not add up due to rounding differences.
[1] After deducting net income attributable to hybrid capital owners and net income attributable to non-controlling interests.

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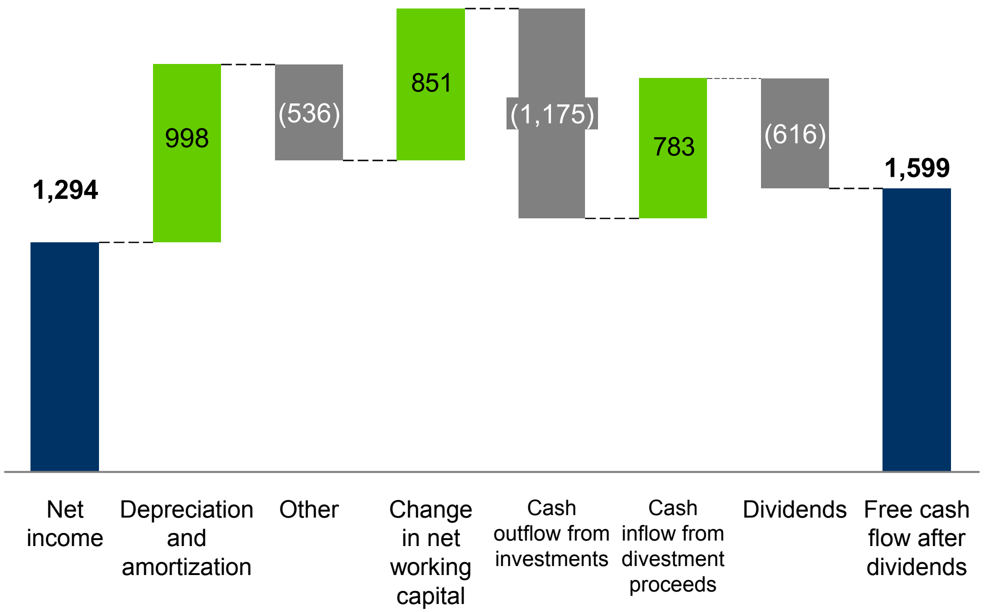
Cash flow

6m/13
in EUR mn

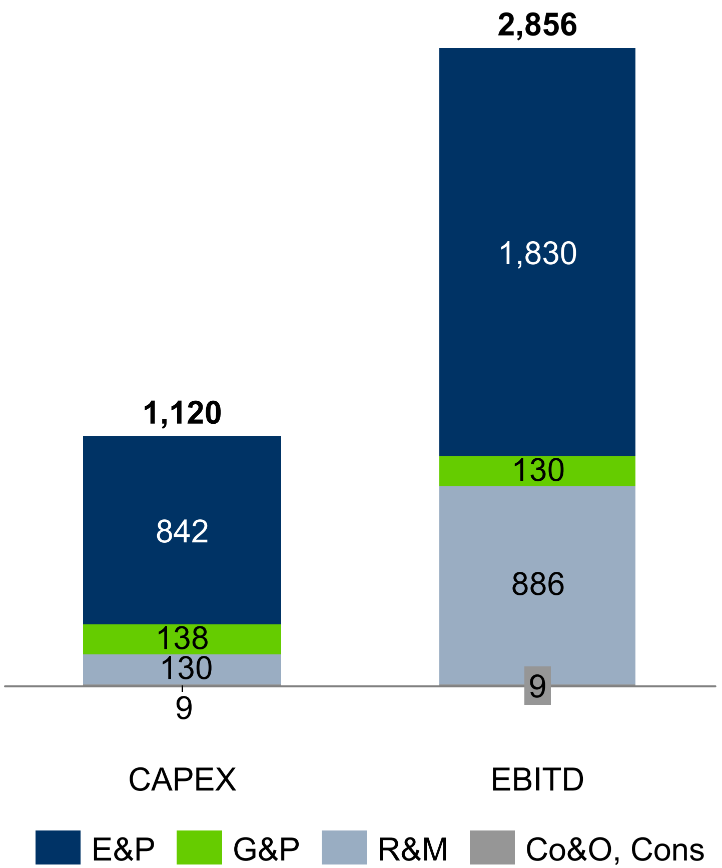


in EUR mn	6m/13	6m/12	△
Net income	1,294	986	31%
Depreciation and amortization	998	1,003	(0)%
Other	(536)	(324)	65%
Sources of funds	1,756	1,665	5%
Change in net working capital	851	130	n.m.
Cash flow from operating activities	**2,607**	**1,795**	**45%**
Cash flow used in investment activities	(392)	(987)	(60)%
Free cash flow	**2,216**	**808**	**174%**
Free cash flow after dividends	**1,599**	**194**	**n.m.**

- Excellent operating result, divestment proceeds and reduced net working capital lead to strong cash generation

CAPEX and EBITD

6m/13
in EUR mn



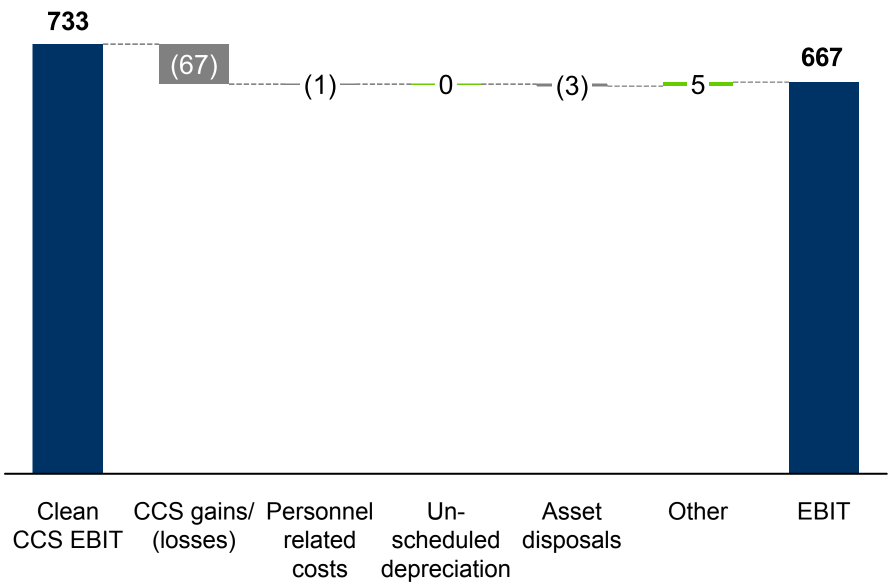
Key investments in Q2/13

- Petrom drilling, workovers and redevelopments
- Field developments in Norway (Aasta Hansteen and Edvard Grieg)
- Schiehallion redevelopment in UK

- EBITD contains EUR 440 mn one-time result impact from completed sale of R&M's Austrian stockholding business in Q1/13

Special items and CCS effect

Q2/13
in EUR mn



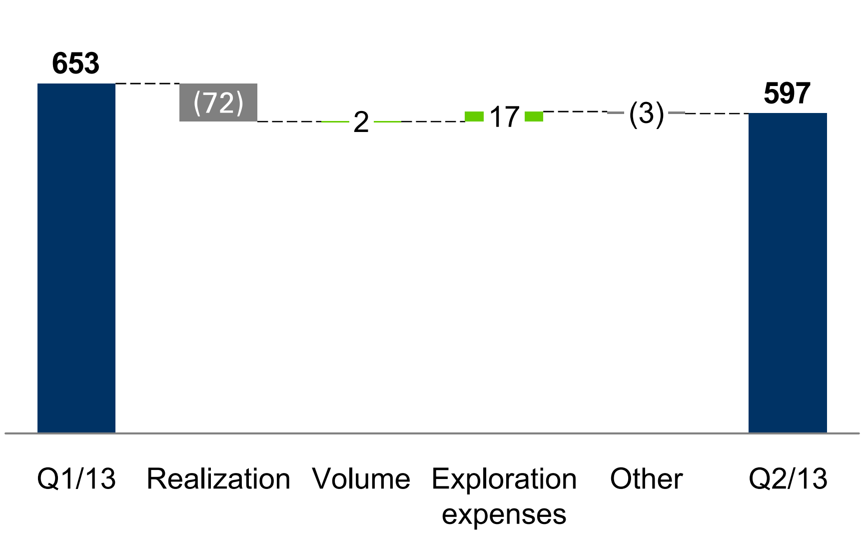
in EUR mn	Q2/13	Q2/12
Clean CCS EBIT	**733**	**865**
CCS gains/(losses)	(67)	(104)
Clean EBIT	**666**	**761**
Personnel related costs	(1)	(23)
Unscheduled depreciation	0	(101)
Asset disposals	(3)	(0)
Other	5	(15)
Total special items	**1**	**(139)**
EBIT	**667**	**621**
Special item financial result: Write-off Nabucco assets	(55)	0

- Negative CCS effect in Q2/13 due to the decrease of crude prices
- No significant net special charges were recorded in the operational result
- Nabucco West project assets write-off: EUR 55 mn net special charges in financial result

Exploration and Production Clean EBIT

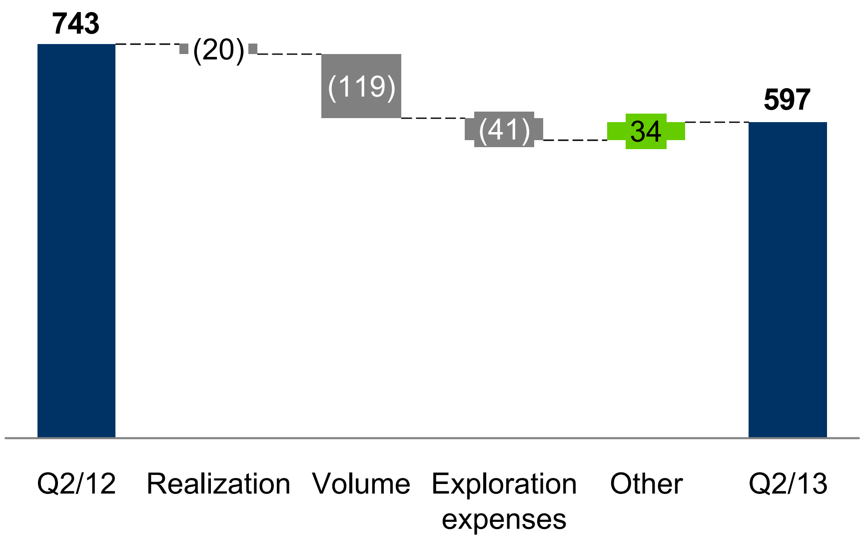
in EUR mn

Q2/13 vs. Q1/13



- Lower oil price
- Higher sales volumes in Tunisia, Austria partly offset by lower sales volumes in Kazakhstan, Libya and New Zealand
- Lower exploration expenses, mainly in Norway and Romania

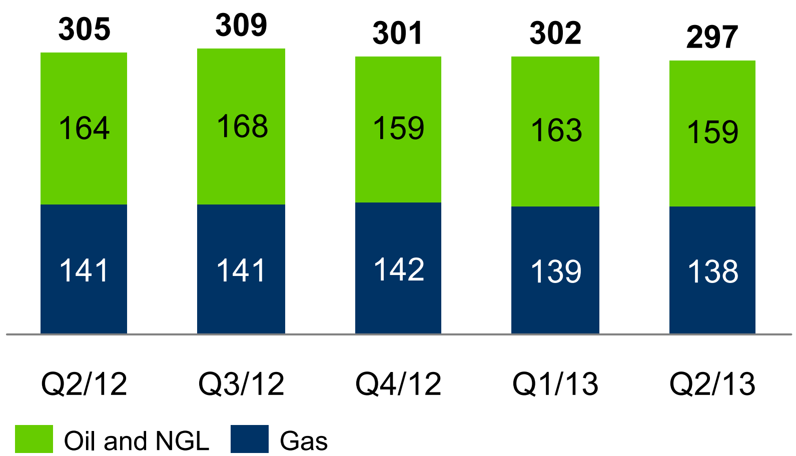
Q2/13 vs. Q2/12



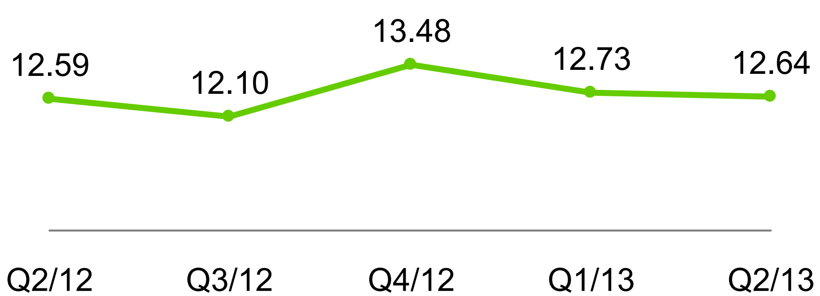
- Lower oil price and weaker USD vs. EUR, partly offset by no hedging and higher gas price
- Lower sales volumes in Libya, UK, New Zealand and Kazakhstan
- Higher exploration expenses in Tunisia, UK and Norway

Exploration and Production Key Performance Indicators

Hydrocarbon production (1,000 boe/d)



OPEX in USD/boe



Q2/13 vs. Q1/13

- Production down by 2%
  - Technical issues in Austria and Kazakhstan
  - Security problems and strikes in Libya
- Higher production in Romania and New Zealand
- Slightly lower production costs driven by Petrom

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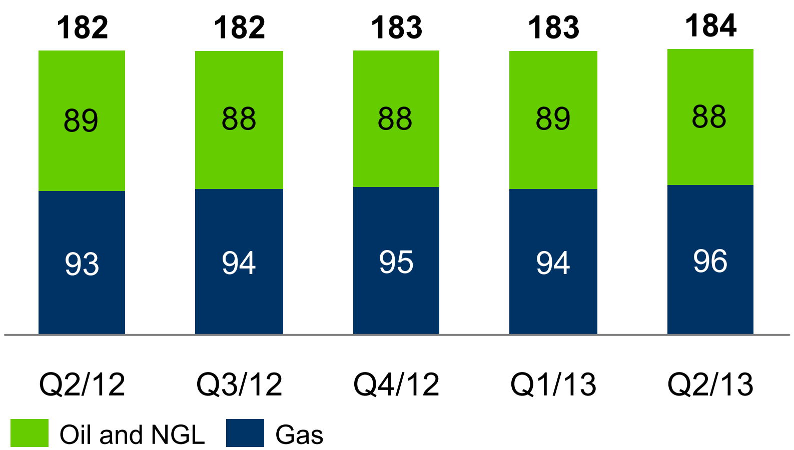
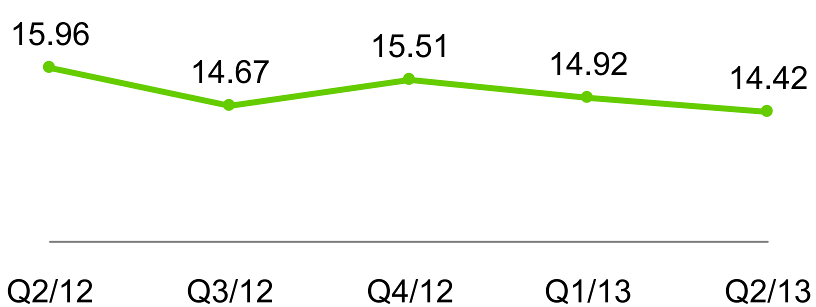
Exploration and Production
Petrom group

Hydrocarbon production (1,000 boe/d)



OPEX in USD/boe



Q2/13 vs. Q1/13

- Clean EBIT of EUR 297 mn down by 8%, mainly due to
  - lower oil price and oil sales
  - partly offset by lower exploration expenses and higher gas price
- Romanian production up by 2%; from 170.6 to 173.2 kboe/d
- Production costs decreased by 3% due to
  - increased production
  - stronger USD vs. RON FX rate

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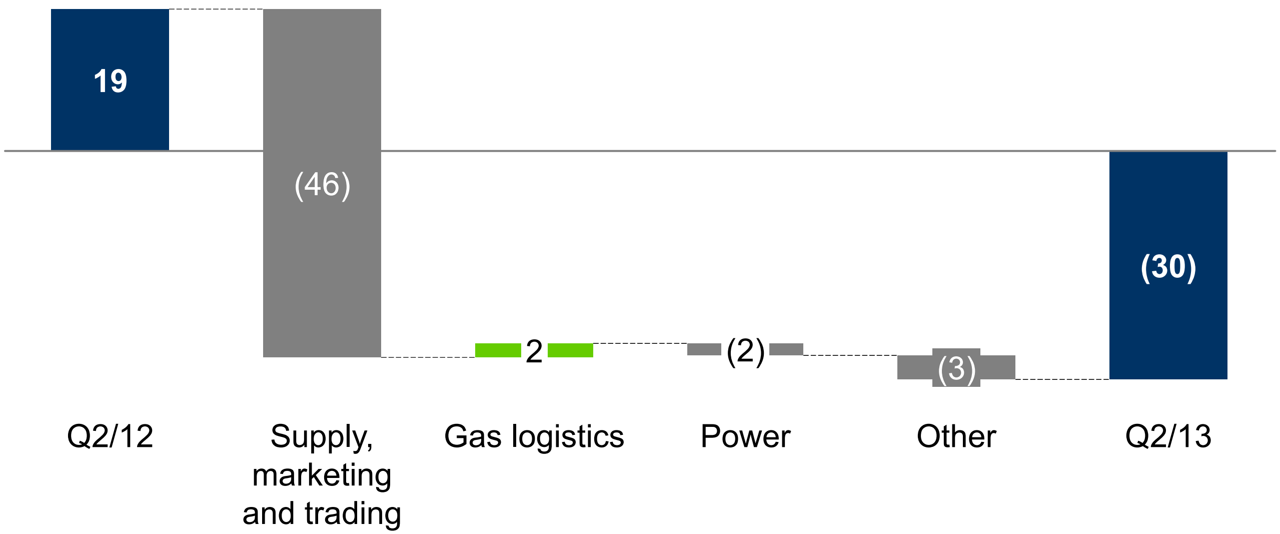
Gas and Power
Clean EBIT

in EUR mn

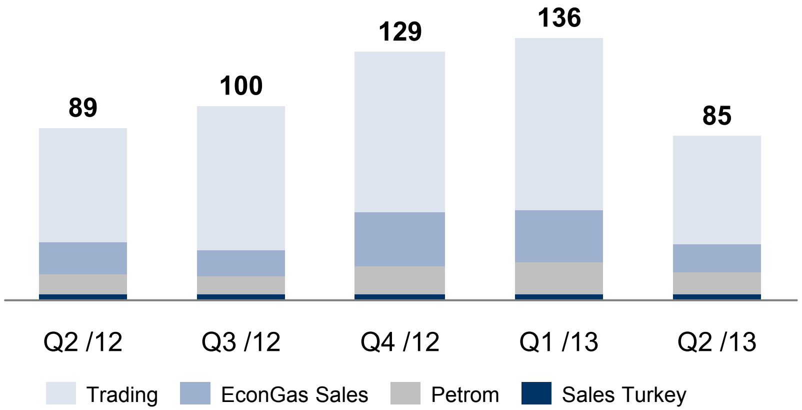
Q2/13 vs. Q2/12



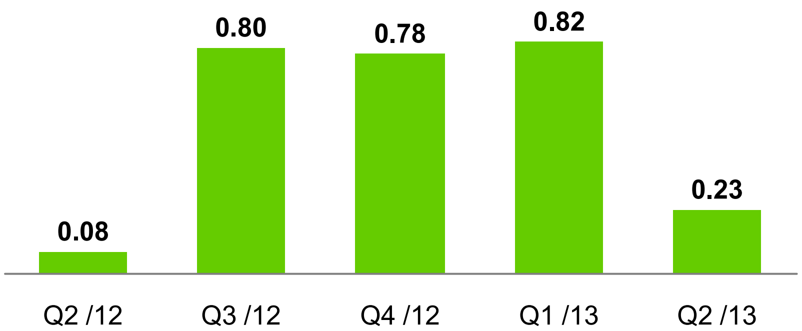
- Supply, marketing and trading: Negative EconGas performance and decrease of gas sales volume
- Gas logistics improved due to better cost position
- Power: Weak performance of Brazi mainly due to the planned one-month shutdown and low electricity prices

Gas and Power
Key Performance Indicators

Gas sales volumes in TWh



Net electrical output in TWh



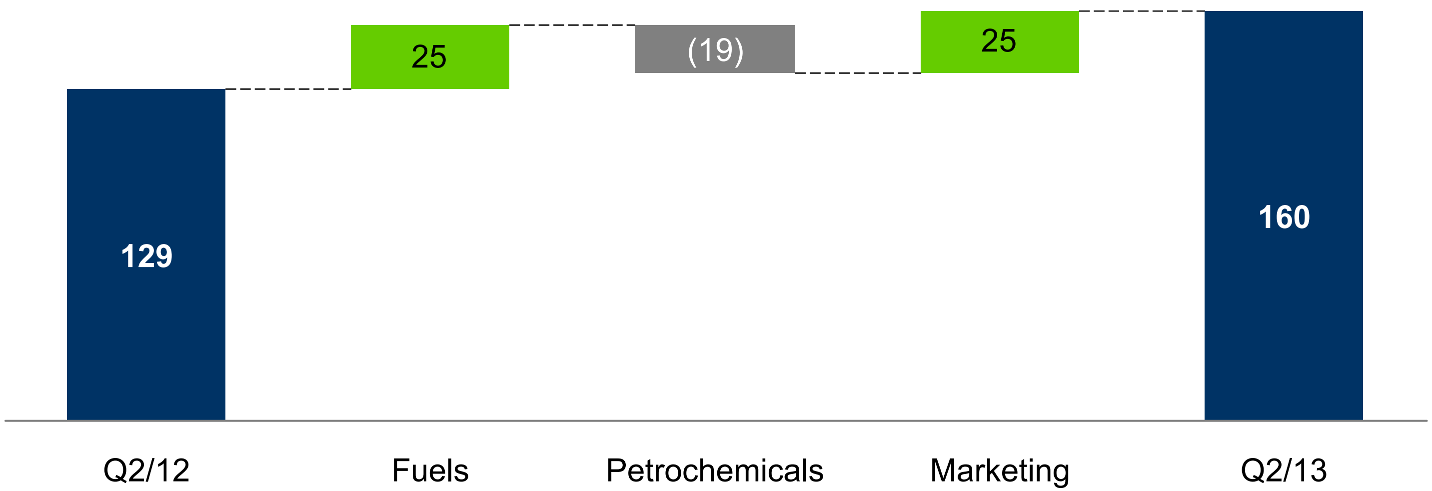
Q2/13 vs. Q2/12

- Total gas sales volumes down by 5% driven by EconGas
- Petrom sales volumes increased by 3%
- Renegotiations with Gazprom and Statoil progressed
- Installation of gas treatment plant at power plant Brazi

Refining and Marketing Clean CCS EBIT

in EUR mn

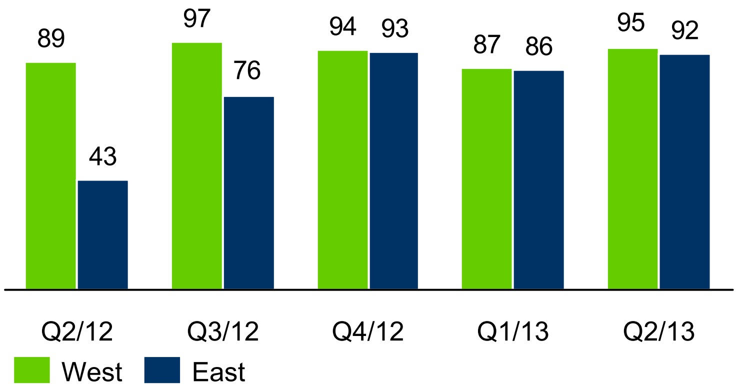
Q2/13 vs. Q2/12



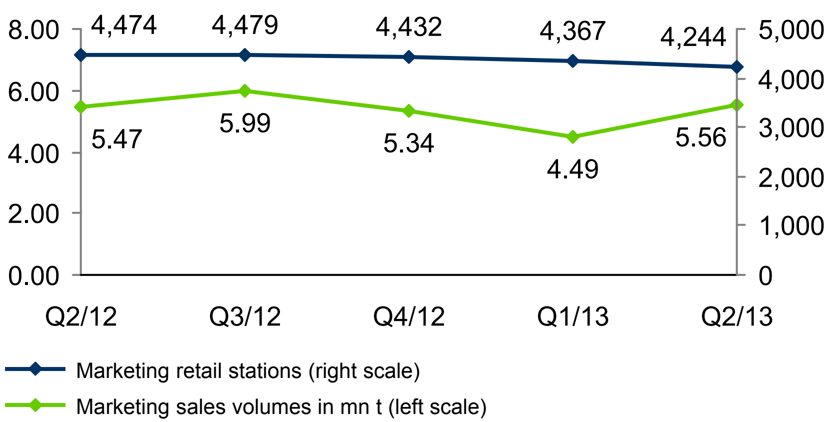
- Improved result in Petrom refining due to six-week shutdown in Q2/12 and lower costs
- Lower petrochemicals margins
- Improved marketing result due to better retail margins and lower costs

Refining and Marketing Key Performance Indicators

Refining utilization rate in %



Marketing



Q2/13 vs. Q2/12

- Refining utilization at 94%, up by 18%
- Marketing sales volumes increased
- Marketing business in Croatia and Bosnia-Herzegovina divested
- Lubricants business divested
- Borealis result lower due to subdued market conditions for European polyolefins business

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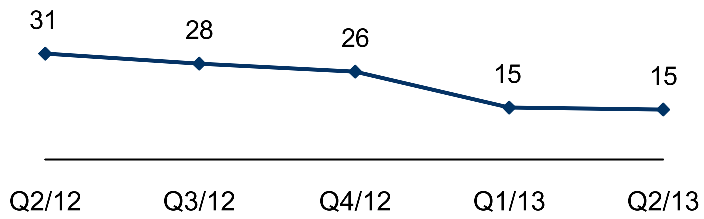
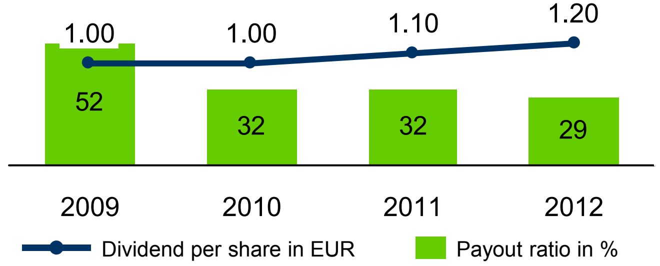
Key financial indicators

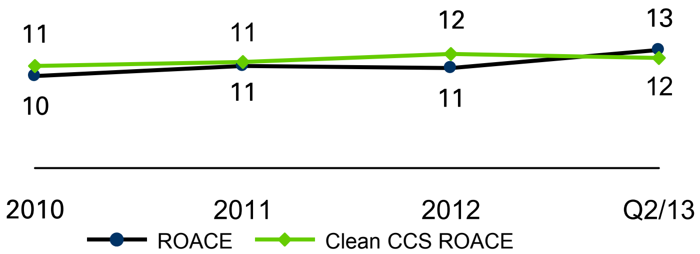
Gearing ratio in %



Payout ratio and DPS



ROACE and Clean CCS ROACE in %



Key financial principles

- Long-term gearing ratio target of ≤30%
- Maintain a strong investment grade rating
- Sustainable dividend policy: Long-term payout ratio target of 30% of net income
- Achieve a ROACE of 13% under average market conditions

Outlook 2013

Market environment

- Brent price: Above USD 100/bbl on average
- Gas market: More determined by hub prices
- Romania: Gas price liberalization in implementation
- Refining margins: Lower levels than in 2012

Business outlook

- CAPEX: Around EUR 2.8 bn before acquisitions; ~70% in E&P
- Further deliver “energize OMV“ program
- Production broadly similar to 2012
- Four high impact exploration wells planned in H2/13
- Focus on finalizing the gas supply contracts renegotiations
- Progress the Petrobrazi refinery modernization
- Continue the R&M divestment program

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energize OMV update

David C. Davies, Deputy Chairman of the Executive Board and CFO

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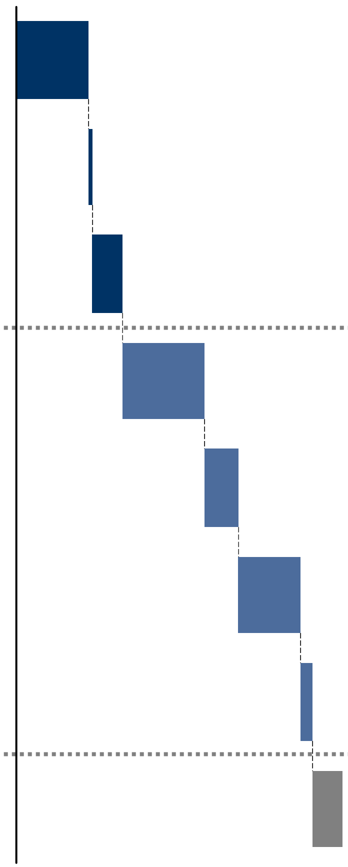
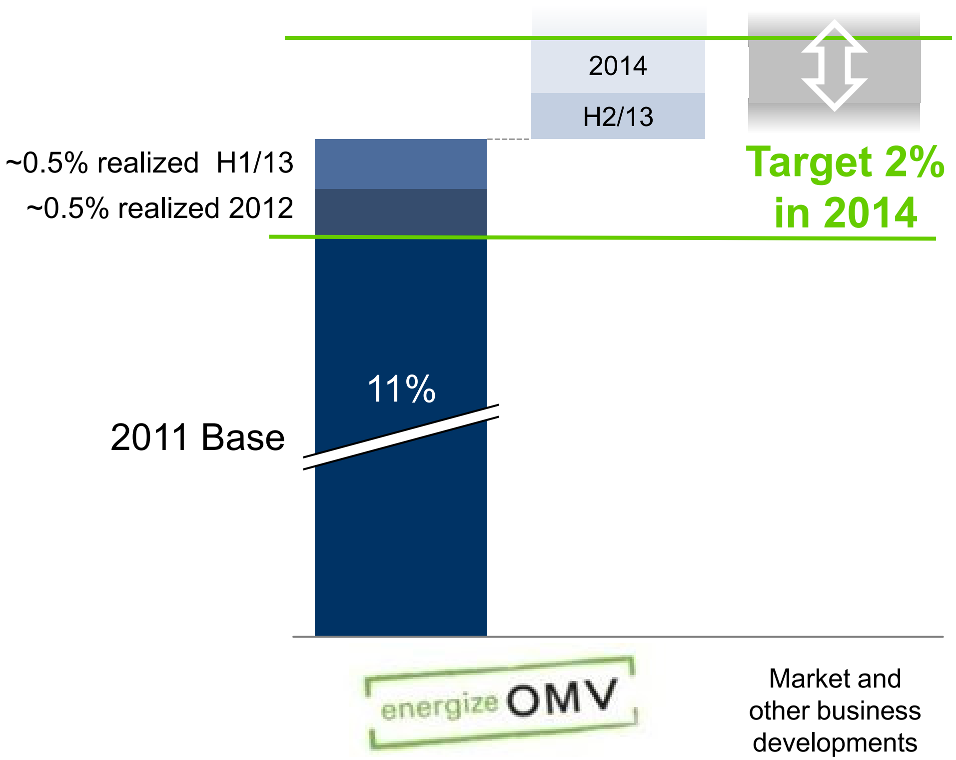
energize OMV – 2% points ROACE increase in 2014 on track

		ROACE impact status June 2013	Date of finalization	Progress since program start
Upstream	Stabilize production in Austria and Romania		2014	↗
	Accelerate production growth in Tunisia and Pakistan		2014	↘
	Ongoing development and operational excellence in rest of world		2014	→
Downstream	Reduce working capital		2012-2014	↗
	Optimize Marketing		2012-2014	→
	Improve Refining		2012-2014	→
	Reduce G&P costs		2013-2014	→
Group-wide initiatives	Optimize organization, improve IT services, reduce procurement spend		2013-2014	↗



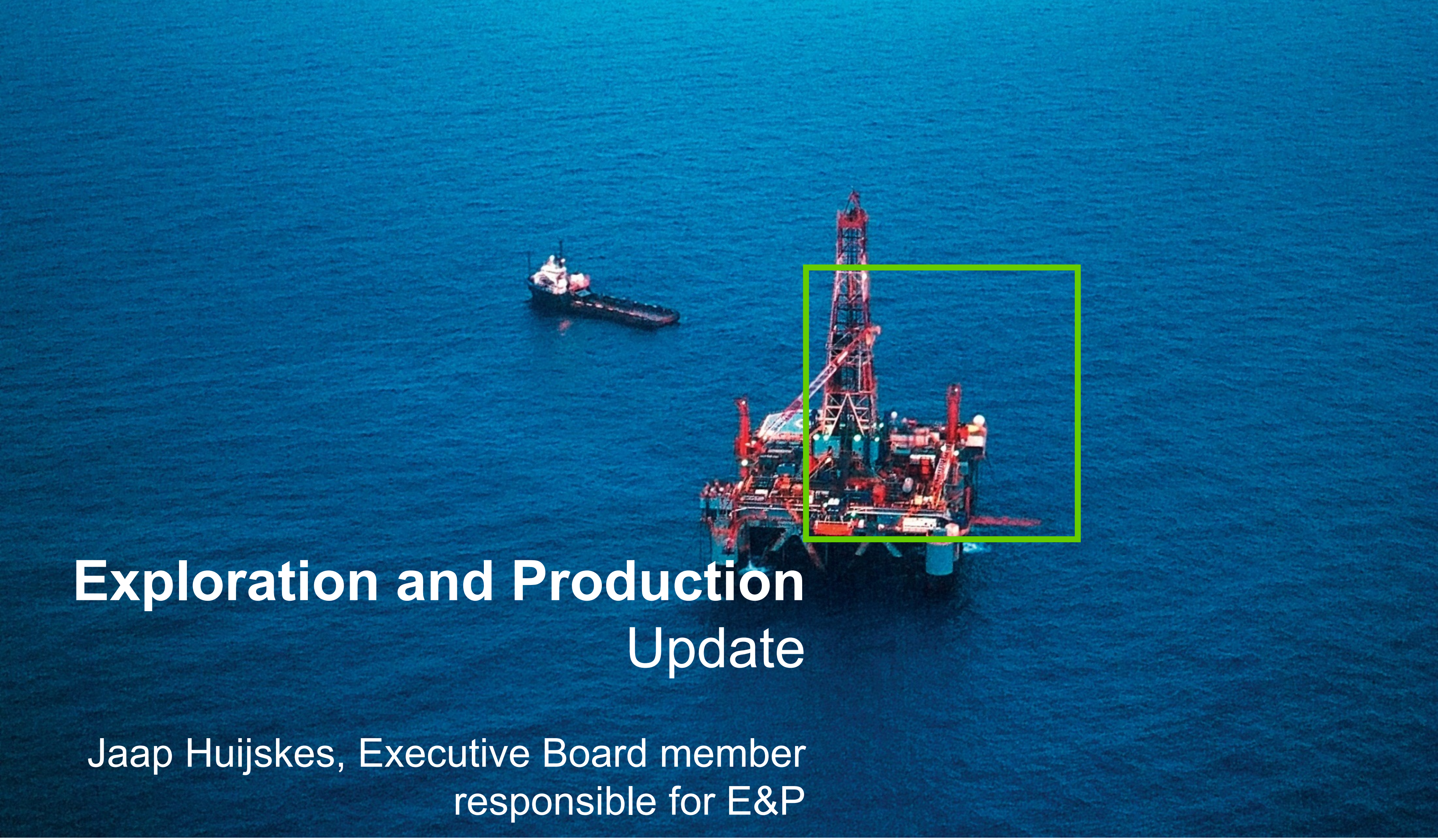
Expected ROACE impact in 2014

Impact of energize OMV on ROACE in 2014 (in % points)



Achievements:

- Commingling successes growing: ~1,500 boe/d achieved by 6m/13 (~600 boe/d in 2012)
- Debottlenecking initiatives in E&P finalized (~2,000 boe/d freed up)
- Implemented working capital reduction EUR ~1,400 mn (EUR 690 mn in 2012)
- Refining yield and cost performance improved (EUR +55mn)
- Optimized Marketing through organization, operational improvements and pricing excellence (EUR +25 mn)
- G&P cost reduction (leaner centralized organization implemented)



Exploration and Production
Update

Jaap Huijskes, Executive Board member
responsible for E&P

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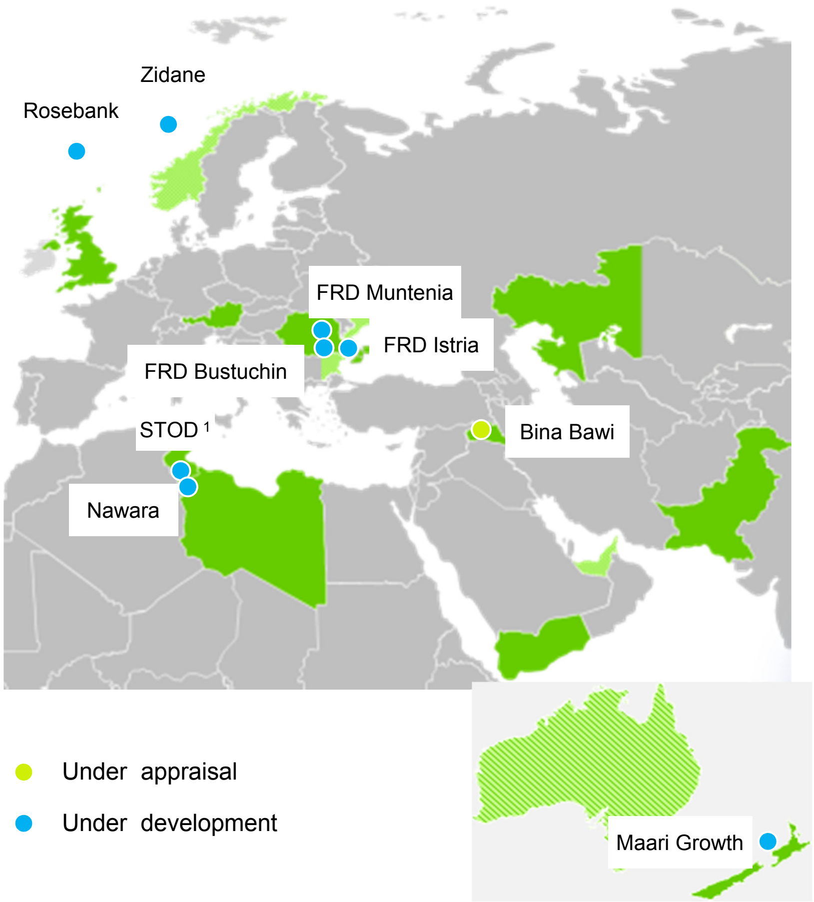
E&P project summary Q2/13



[1] South Tunisian Oil Development.

- **Further strengthened project pipeline to ~1bn boe**
- **~500 mn boe under appraisal**
  - **New FRD projects established in Romania**: FRD Bustuchin, FRD Muntenia, FRD Istria
  - **Bina Bawi** (Kurdistan Region of Iraq) field development plan progressing, testing finished: limited oil volumes but significant gas potential, albeit sour gas
- **~470 mn boe under development**
  - Projects **moved into development phase**: Zidane (Norway), STOD [1] (Tunisia), FRDs Romania and Austria
  - **Additional projects** established: Maari Growth (New Zealand)
  - **Updated FID's schedule:**
    - Nawara (Tunisia): Q4/13
    - Rosebank (UK): Q1/14

Major projects under development

New ventures | Exploration | Appraisal | **Development** | **Execution**

Project	Country	Type primary	Production start year	2P reserves mn boe	Peak production kboe/d	Project investments EUR mn	Working interest %	Operated
STOD [1]		Oil	2012	~4	~2	t.b.d.	50.0	OP
FRD Romania		Oil/Gas	2013-2015	~75	~17	~450	100.0 [2]	OP
Mehar		Gas/NGL	2013	~15	~5	~100	59.2	OP
Latif		Gas	2013	~9	~6	~35	~33.3	OP
FRD Austria		Oil/Gas	2013-2015	~15	~9	~260	100.0	OP
Maari Growth		Oil	2014	~10	~7	~150	69.0	OP
Habban		Oil	2014	~28 [3]	~10	~820 [3]	44.0	OP
Schiehallion		Oil	2016	~21	~6	~370	~5.9	NO
Edvard Grieg		Oil	2016	~38	~19	~640	20.0	NO
Nawara		Gas	2016 [4]	40-50	~10 [4]	n/a [4]	50.0	OP
Aasta Hansteen		Gas	2017	~43	~18	~760	15.0	NO
Zidane		Gas	2018	~20	~7	t.b.d.	20.0	NO
Rosebank		Oil	2018	50-60	~20	~1,500	20.0	NO

All figures net to OMV.
[1] South Tunisian Oil Development. [2] Via Petrom. [3] Including Phase 1 and 2 of the project. [4] Under revision until FID.

Peak production not adding up in the same year!

Major projects under appraisal

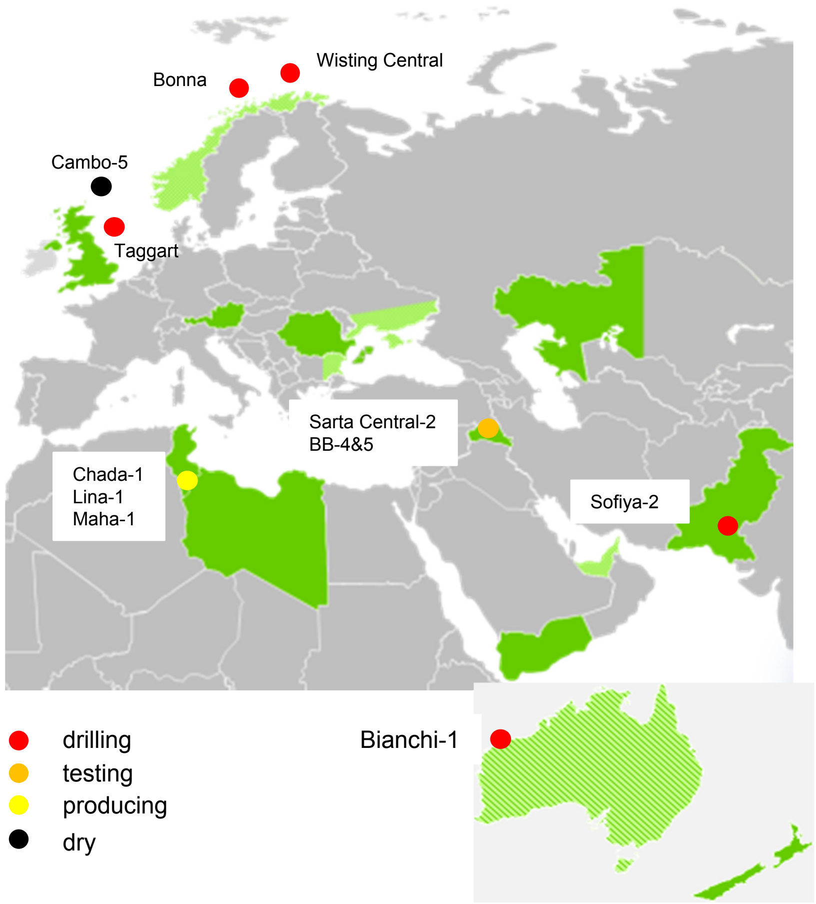
New ventures | Exploration | **Appraisal** | Development | Execution

Project	Country	Type	Production start	Cumulative production	Working interest	Operated
		primary	year	mn boe	%	
Bina Bawi		Oil/Gas	2013 [1]	t.b.d.	36.0	OP
FRD Romania		Oil/Gas	2014-2017	150-200	100.0 [2]	OP
FRD Austria		Oil/Gas	2015	~5	100.0	OP
WoS [3] / CNS [4]		Oil/Gas	2018-2020	~40-60	9.7-35.0	OP / NO
Shuwaihat [5]		Gas/NGL	end of decade	t.b.d.	50.0 [6]	NO
Domino		Gas	end of decade	0.75-1.5 tcf	50.0 [2]	NO
Zola		Gas	end of decade	t.b.d.	20.0	NO

All figures net to OMV .

[1] Early production facilities.
[2] Via Petrom. [3] West of Shetland (Cambo, Tornado).
[4] Central North Sea (Jackdaw).
[5] Technical Evaluation Agreement.
[6] 50% of expected gross volumes in appraisal phase to OMV.

Exploration summary Q2/13



[1] South Tunisian Oil Development.
[2] Central North Sea.

High impact drilling:

- **Norway:** Bonna-1 spud (July); Wisting (operated) spud (Aug.)
- **Australia:** Bianchi-1 appraisal well successful – discovered 112 m net gas pay
- **UK:** Cambo 5 – dry

Further drilling:

- **Pakistan**: Sofiya-2 drilling
- **Tunisia (STOD [1])**: Chada-1 (drilled in Q1/13) on oil production;
  Lina-1 gas and condensate discovery; Maha-1 testing;
- **UK (CNS [2])**: Taggart exploration well, drilling
- **Kurdistan Region of Iraq:** Sarta Central-2 drilling;
  Appraisal wells Bina Bawi 4 and 5 testing finalized

Seismic:

  - **Neptun Deep (Romania)**: ~6,000 km² 3D – completed
  - **Han Asparuh block (Bulgaria):** ~7,700 km² 3D started

Newly secured acreage:

- Abu Dhabi upstream exploration agreement signed in June
- Six exploration licenses awarded in 22nd licensing round (Norway)

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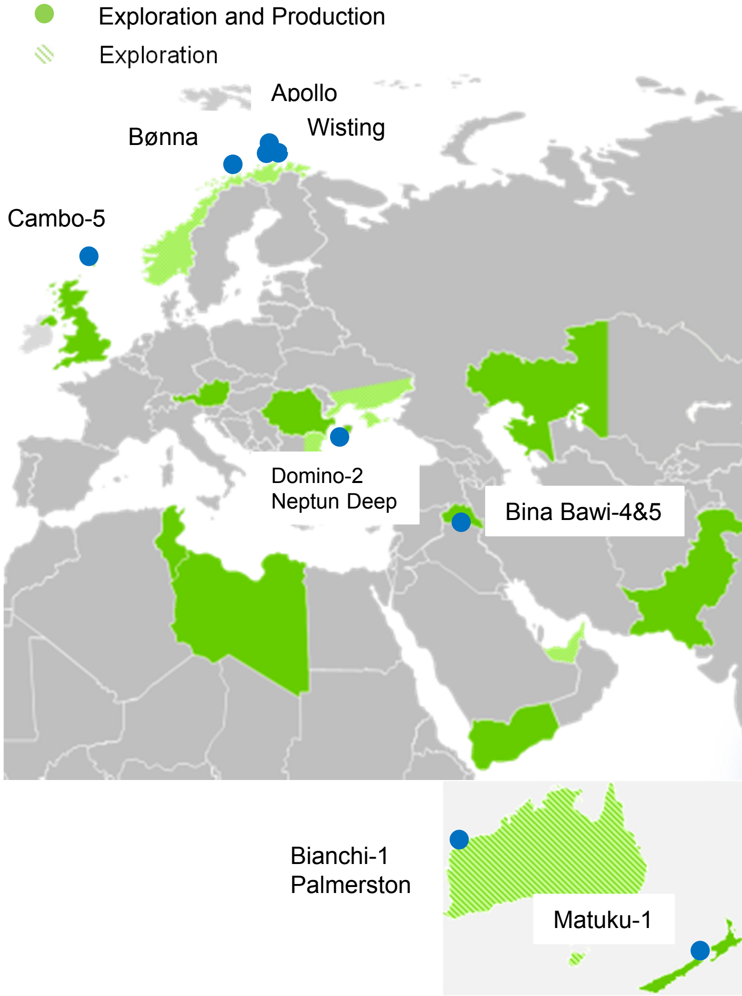
High impact wells [1] in 2013/14



Well	Country	Basin/Block	Type [2]	Spud date	Working interest	Operated
Bønna	Norway	Barents Sea	E	Drilling	20%	NO
Wisting Central	Norway	Barents Sea	E	Q3/13	25%	OP
Wisting Main	Norway	Barents Sea	E	Q3/13	25%	OP
Apollo	Norway	Barents Sea	E	2014	20%	NO
Bina Bawi-4	Kurdistan	Zagros Fold Belt	A	Tested; under evaluation	36%	OP
Bina Bawi-5	Kurdistan	Zagros Fold Belt	A	Tested; under evaluation	36%	OP
Domino-2	Romania	Black Sea	A	Late 2013 / early 2014	50% [3]	NO
Neptun Deep	Romania	Black Sea	E	Late 2013 / early 2014	50% [3]	NO
Bianchi-1	Australia	Carnarvon Basin	A	Q2/13 gas discovery	20%	NO
Palmerston-1	Australia	Carnarvon Basin	E	Q1/14	~33%	NO
Matuku-1	New Zealand	Taranaki Basin	E	Q3/13	65%	OP
Cambo-5	United Kingdom	West of Shetland	A	Q2/13 dry	15%	NO

[1] >25 mn boe net to OMV. [2] Exploration/Appraisal. [3] Via Petrom.

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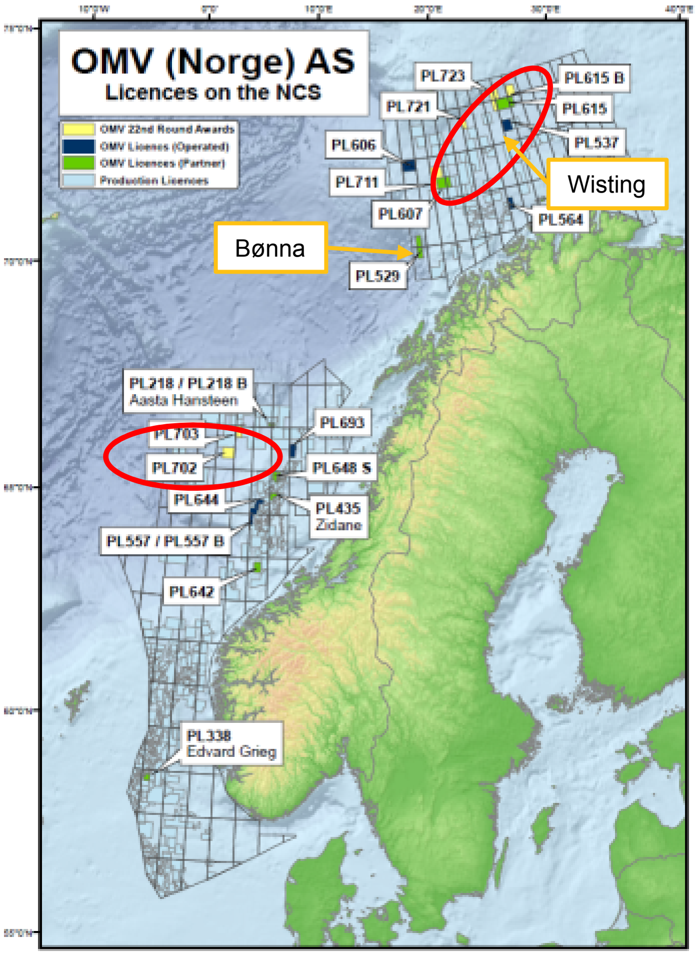
OMV committment to Norway growth rewarded with successful license award



- Norway is currently a **global exploration hot spot** [2]
- **6 new exploration licenses** in 22nd licensing round
  - 4 non-operated in the Barents Sea
  - 2 operated in the Norwegian Sea (Aasta Hansteen area)
  - Drill or drop options
- **+40%** [1] - total now **23 offshore licenses**
- **First place** for non-Norwegian companies; overall 2nd behind Statoil in 22nd licensing round
- Important driver for **future organic growth**

[1] In terms of no. licenses. [2] Norwegian Continental Shelf, Barents Sea.

Area of new licenses

Upstream – Key energize OMV achievements

Stabilize production in Romania and Austria

- **Facilities debottlenecked**
  ~1,100 boe/d freed up by installing one additional separator in Austria
- **First wells produced commingled**
  additional ~1,500 boe/d achieved by 6m/13 in Austria and Romania
- **Water injection increased**
  ~17% increase of injected water in Romania by 6m/13
- **Reserves matured faster**
  5 projects passed FID in 6m/13;
  8 FRDs progressed;
  2 FRDs accelerated

Accelerate production growth in Tunisia and Pakistan

- **Accelerate South Tunisia Oil Development**
  - Drilling campaign accelerated – 14 wells drilled to date
  - Results below expectations due to poor reservoir performance
- **Mehar (Pakistan)**
  Construction activities on track to come on stream in Q4/13
- **Latif (Pakistan)**
  Pipeline construction on track to deliver first gas in Q3/13

Ongoing development and operational excellence in rest of world

- **Growing contribution of cost optimization**
  e.g. OPEX savings achieved in Kazakhstan in 6m/13 (EUR 6 mn)
- **Ensure delivery of ongoing developments**
  Maari (New Zealand) growth projects passed FID with plan for accelerated drilling campaign
  (2 drilling units) starting end 2013

FID: Final Investment Decision.
FRD: Field redevelopment.

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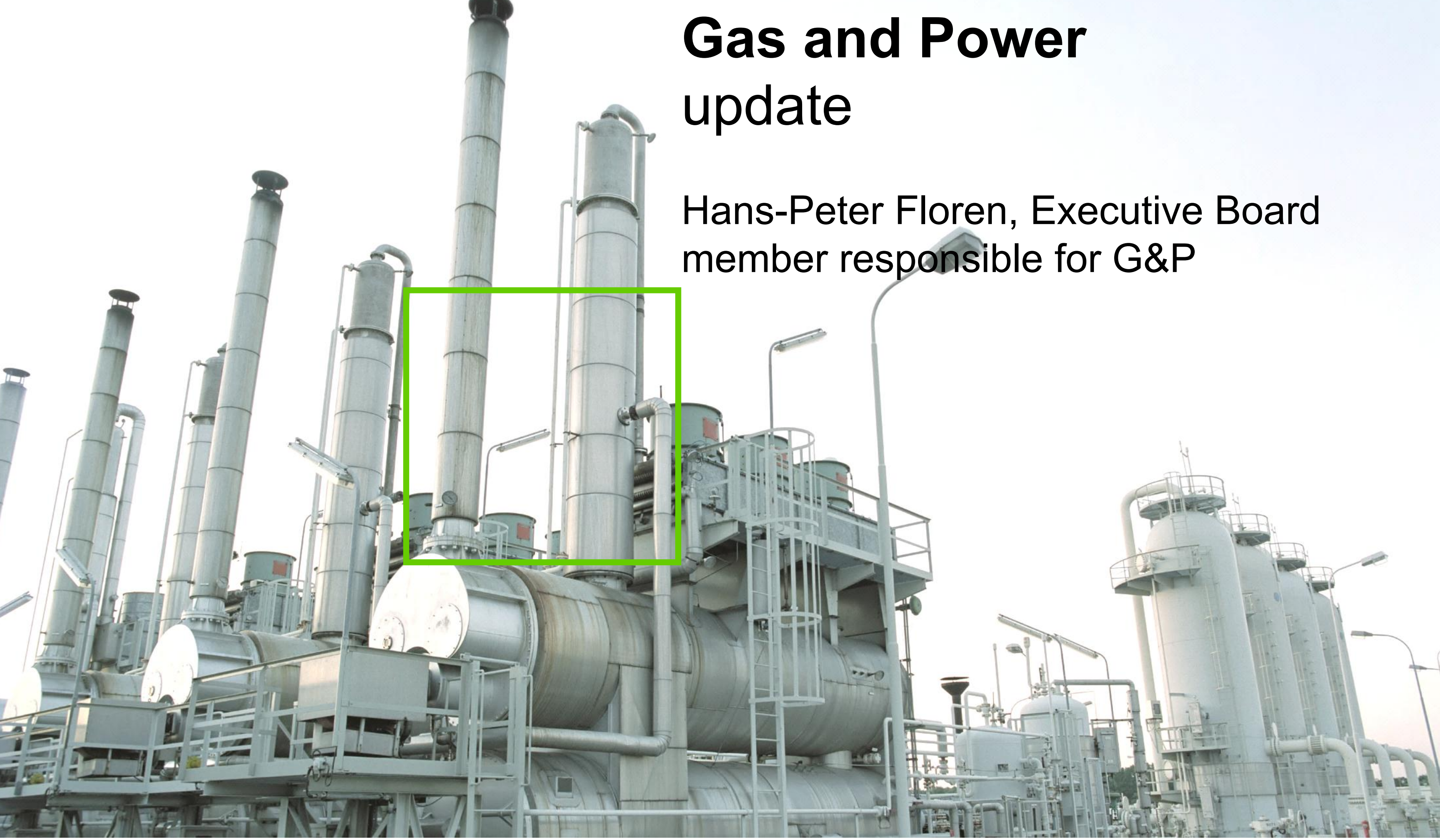
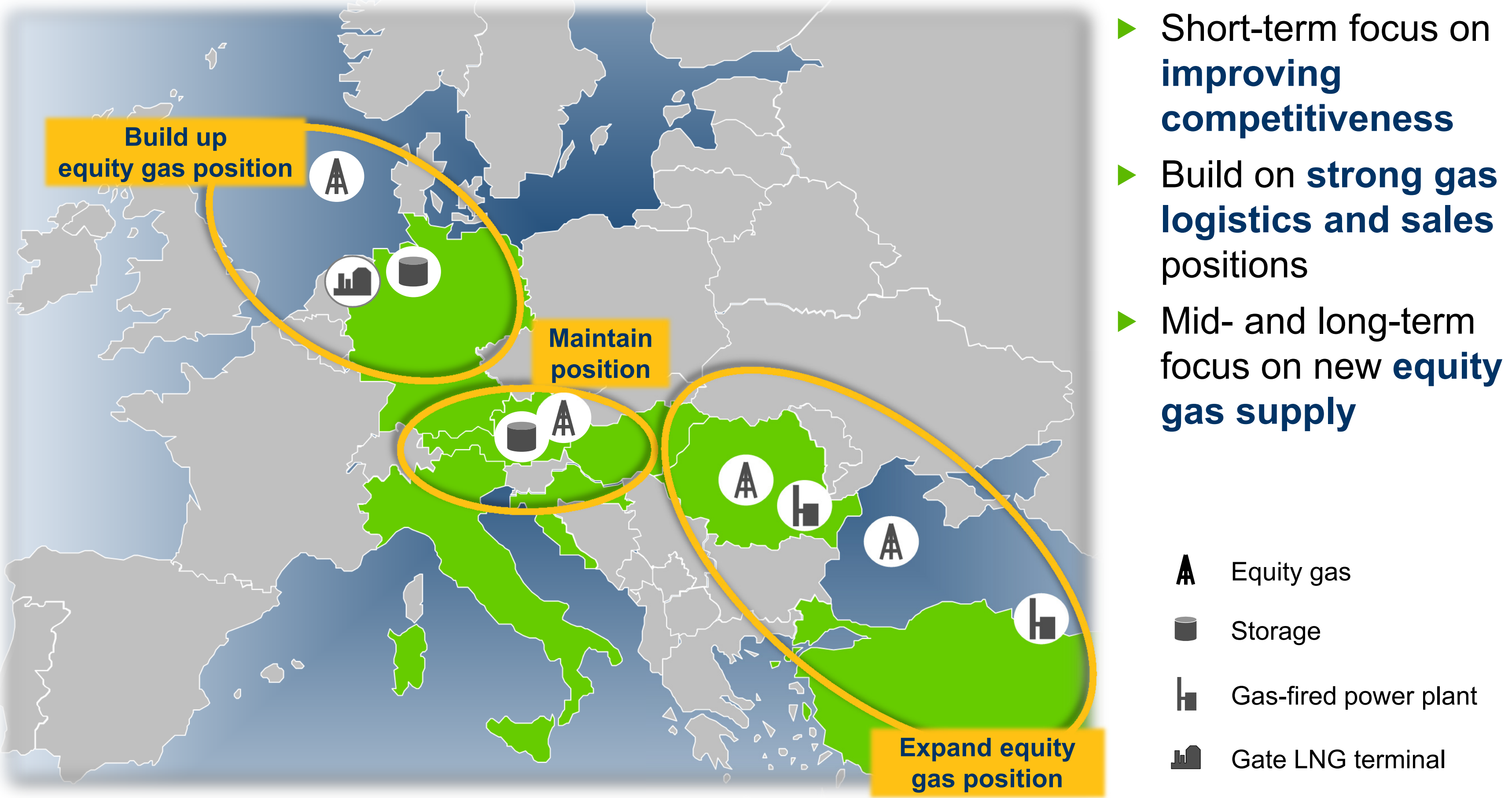


Gas and Power
update

Hans-Peter Floren, Executive Board member responsible for G&P

Integrated gas:
Optimizing OMV's equity gas positions



- Short-term focus on **improving competitiveness**
- Build on **strong gas logistics and sales** positions
- Mid- and long-term focus on new **equity gas supply**

1.7 GW gas-fired power plants on stream

Brazi CCPP (Romania)

- **860 MW** net capacity
- **Equity gas-fired**
- Investment: **EUR ~530 mn**

Status

- Commercial operations since August 2012
- ~9% market share at full capacity
- Most modern and flexible power plant in Romania
- Two times higher efficiency than the sector average in Romania
- Flexibility: Fast start up and high ramp rate (20 MW/min for each GT)

Samsun CCPP (Turkey)

- **870 MW** net capacity
- Equity gas **integration targeted**
- Investment: **EUR ~600 mn**

Status

- Start of operations by end of June, 2013
- Net efficiency >58% → 17%-points higher than average Turkish thermal generation

Refining and Marketing update

Manfred Leitner, Executive Board member responsible for R&M

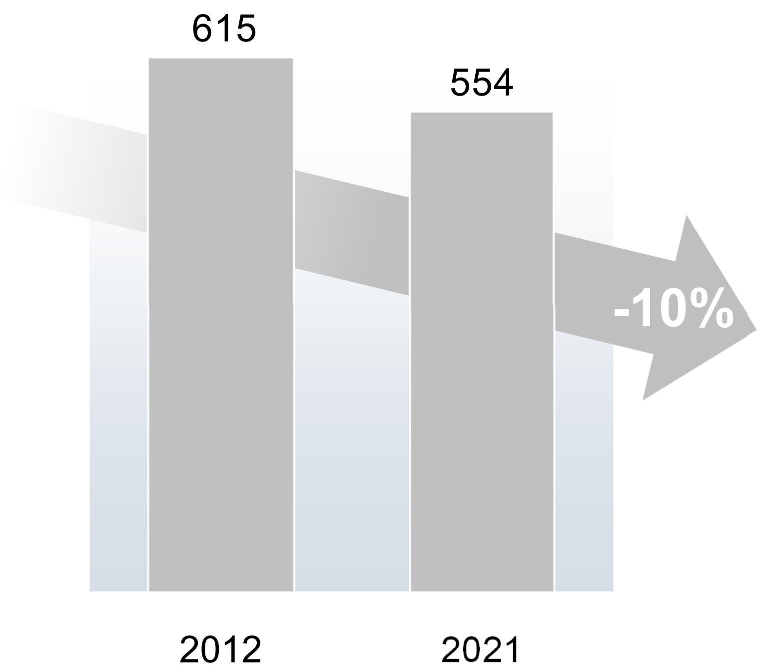
OMV Aktiengesellschaft

Moving more. Moving the future. OMV

OMV downstream market grows despite European trend

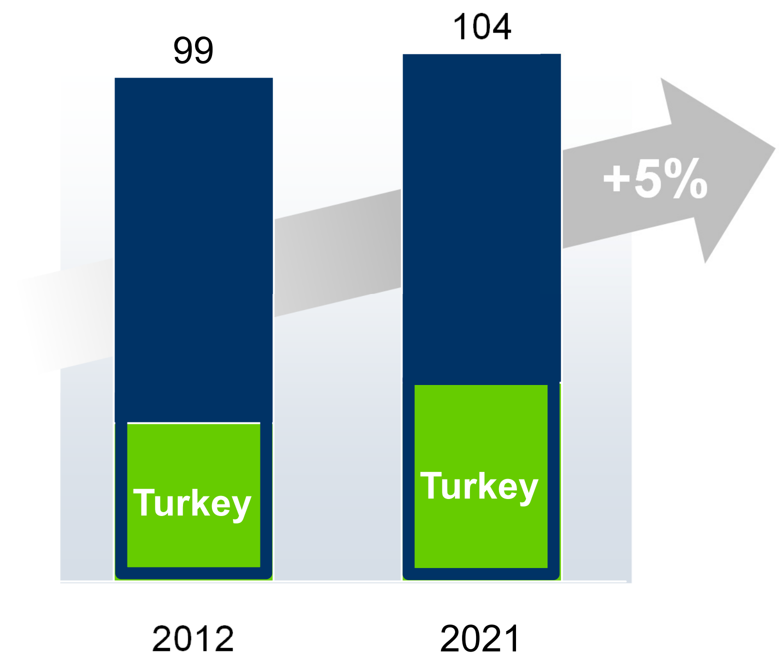
EU-28 market [1]

In mn t



OMV market [1, 2]

2012-21, mn t



[1] Oil market products: LPG, naphtha, gasoline, jet/kero, gasoil, fuel oil, other products.
[2] Austria, Germany, Czech Republic, Slovakia, Hungary, Romania, Slovenia, Moldova, Bulgaria, Serbia, Turkey.
Source: JBC Energy (April 2013), OMV analysis.

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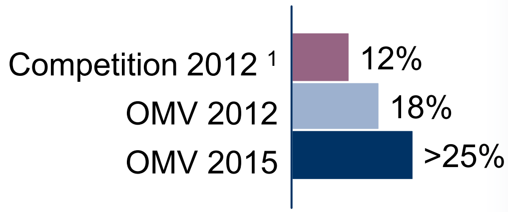
Strong business integration and further increased asset utilization

E&P

Refining

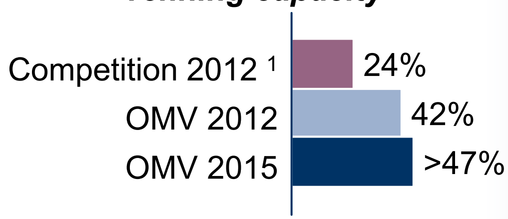
Own crude oil % of refining capacity



Refining

Retail

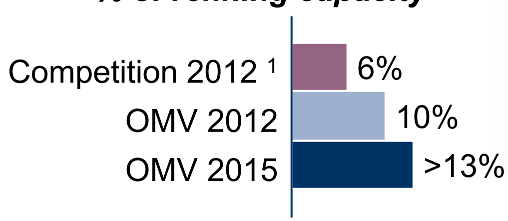
Retail sales vol. % of refining capacity



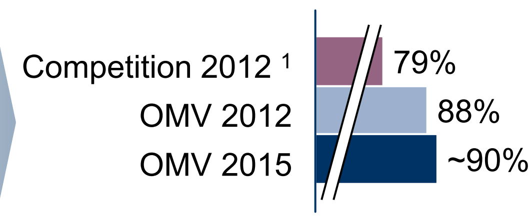
Refining

Petrochemical

Petrochemicals sales vol. % of refining capacity



Refinery utilization rate



[1] OMV's European competitors: BP Europe, ENI Europe, Exxon Europe, Lotos, MOL, Neste, NIS, Phillips 66 Europe, PKN. Orlen, Repsol Europe, Rompetrol, Shell Europe, Total Europe, Tupras.

Source: Annual reports, OMV analysis.

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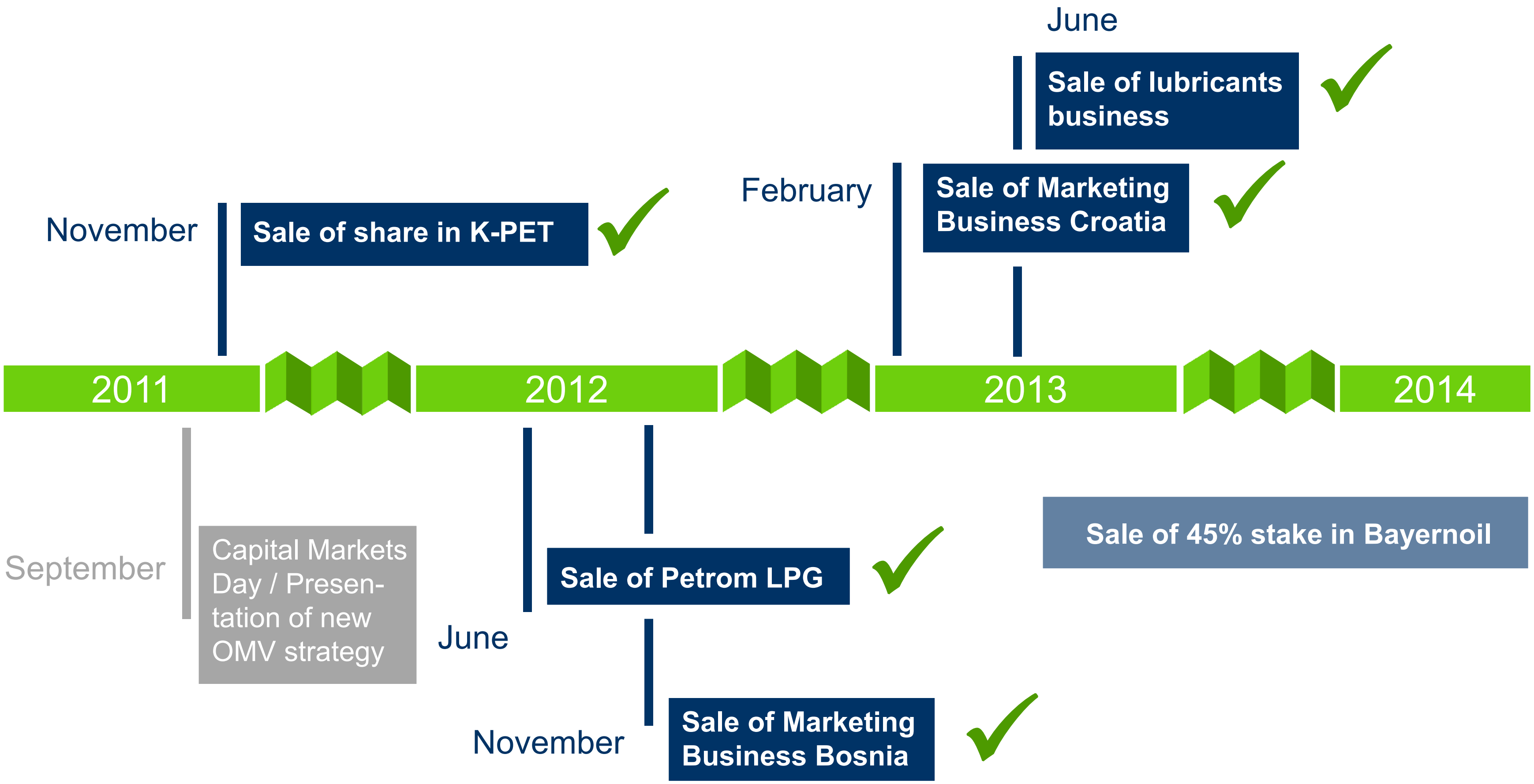
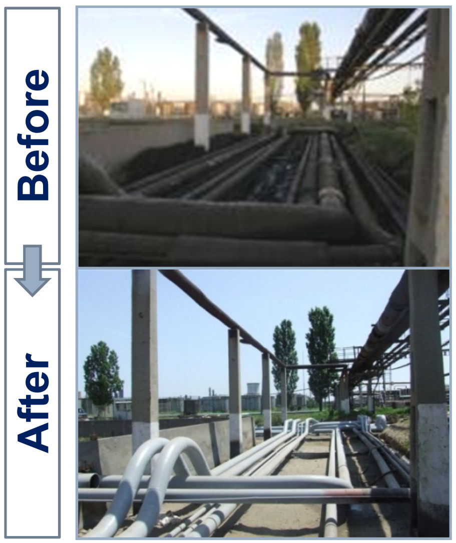
Divestments of up to EUR 1 bn on track



Note: Monthly indication represents signing date.

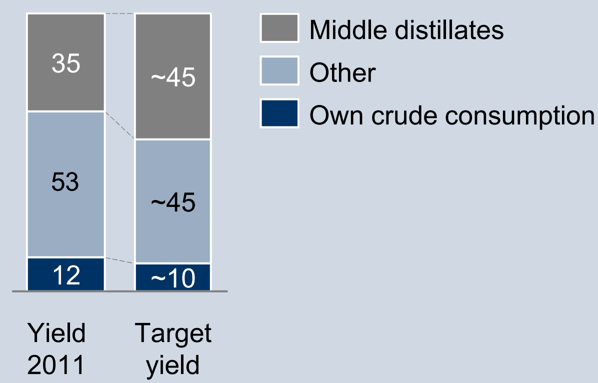
Modernization of upstream integrated refinery Petrobrazi leads to significant yield improvements

2010 ✓	2011 ✓	2012 ✓	2013 ✓	2014	2015
Concept, feasibility, FEED	**Execution phase**	**Crude distillation revamp**	**Coker upgrade & desulfurization**	**Vacuum gasoil conversion**	**First full year of benefits**



Picture: Sleeper road inside refinery before/after removal of unused pipes and renewal

Picture: 52 inch transfer line change from 2x 24 inch; prior to CDU revamp



Petrobrazi margin increase of ~5 USD/bbl [1] as of 2015 expected as a result of EUR ~600 mn CAPEX investment

[1] Price set at 6m/11, OMV analysis.

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Strong contribution to energize OMV – R&M achievements

Reduce working capital

- Sale of Austrian national stock holding business
EUR ~190 mn
- Securitization EUR ~290 mn, Factoring EUR ~220 mn, Supplier Financing
EUR ~175 mn
- Operational measures
EUR ~280 mn

Optimize marketing

- Operational excellence filling stations EUR ~5 mn
- Pricing excellence
EUR ~15 mn
- Restructured organization
EUR ~5 mn

Improve refining

- Yield improvement
EUR ~45 mn
- Better cost performance
EUR ~10 mn

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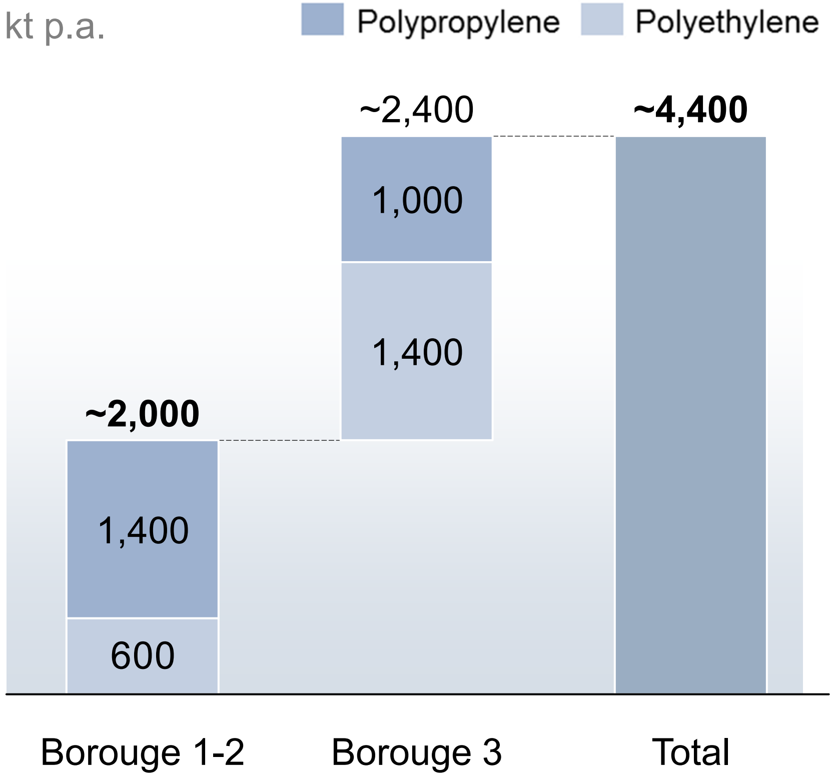
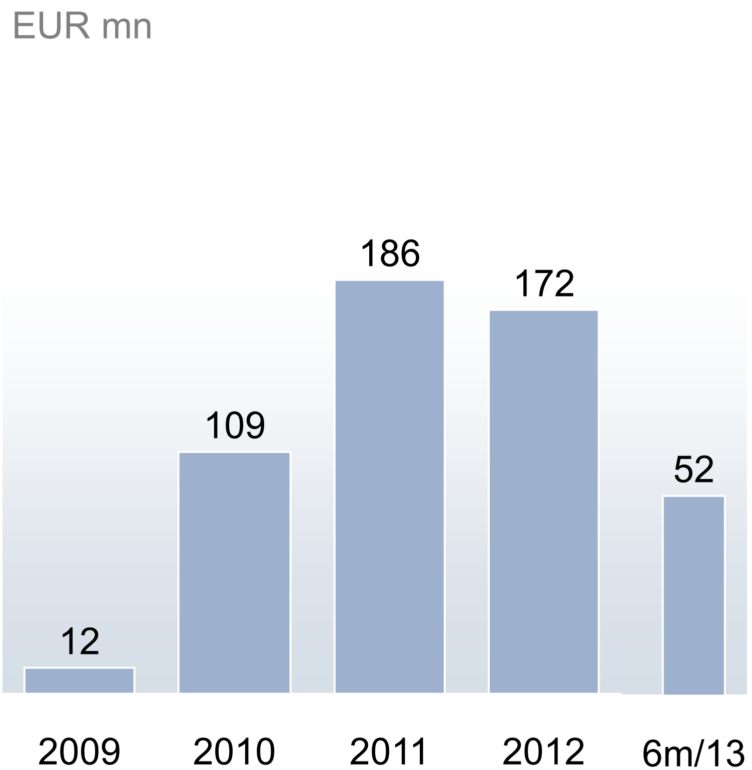
Borealis contributes strongly to R&M results

Borouge [1] as capacity driver of Borealis, adding ~4.4 mn t per year until 2014



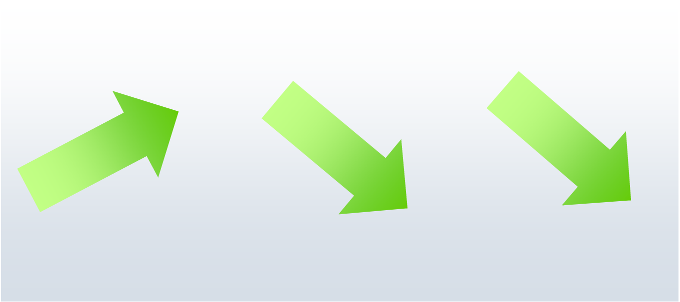
Solid contribution to OMV's bottom line from Borealis (OMV share 36%)



[1] Borouge, a joint venture between Abu Dhabi National Oil Company (ADNOC, 60%) and Borealis (40%), is a leading provider of chemicals and innovative plastics solutions for the infrastructure, automotive and advanced packaging markets.

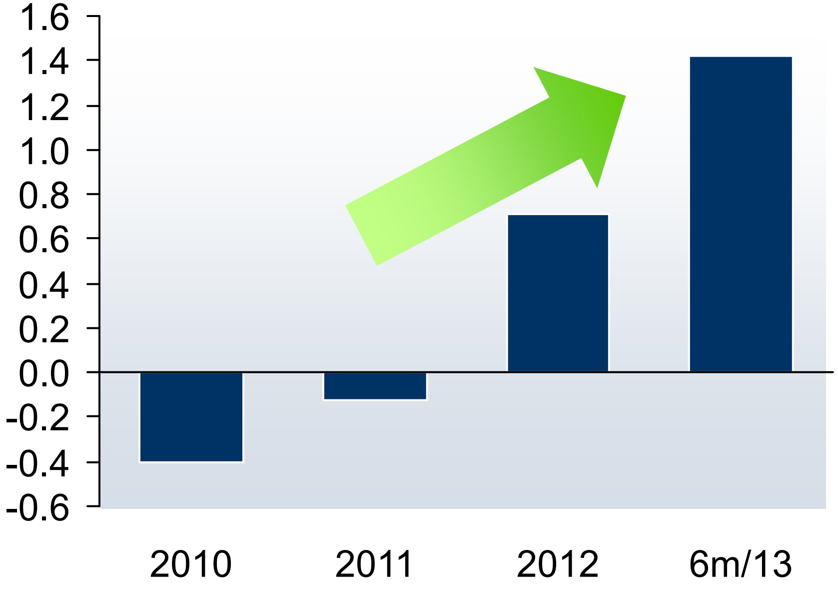
R&M´s cash generation improved significantly and supports OMV's integrated business model

EBITD	Investment	NWC



Cash generation

bn EUR



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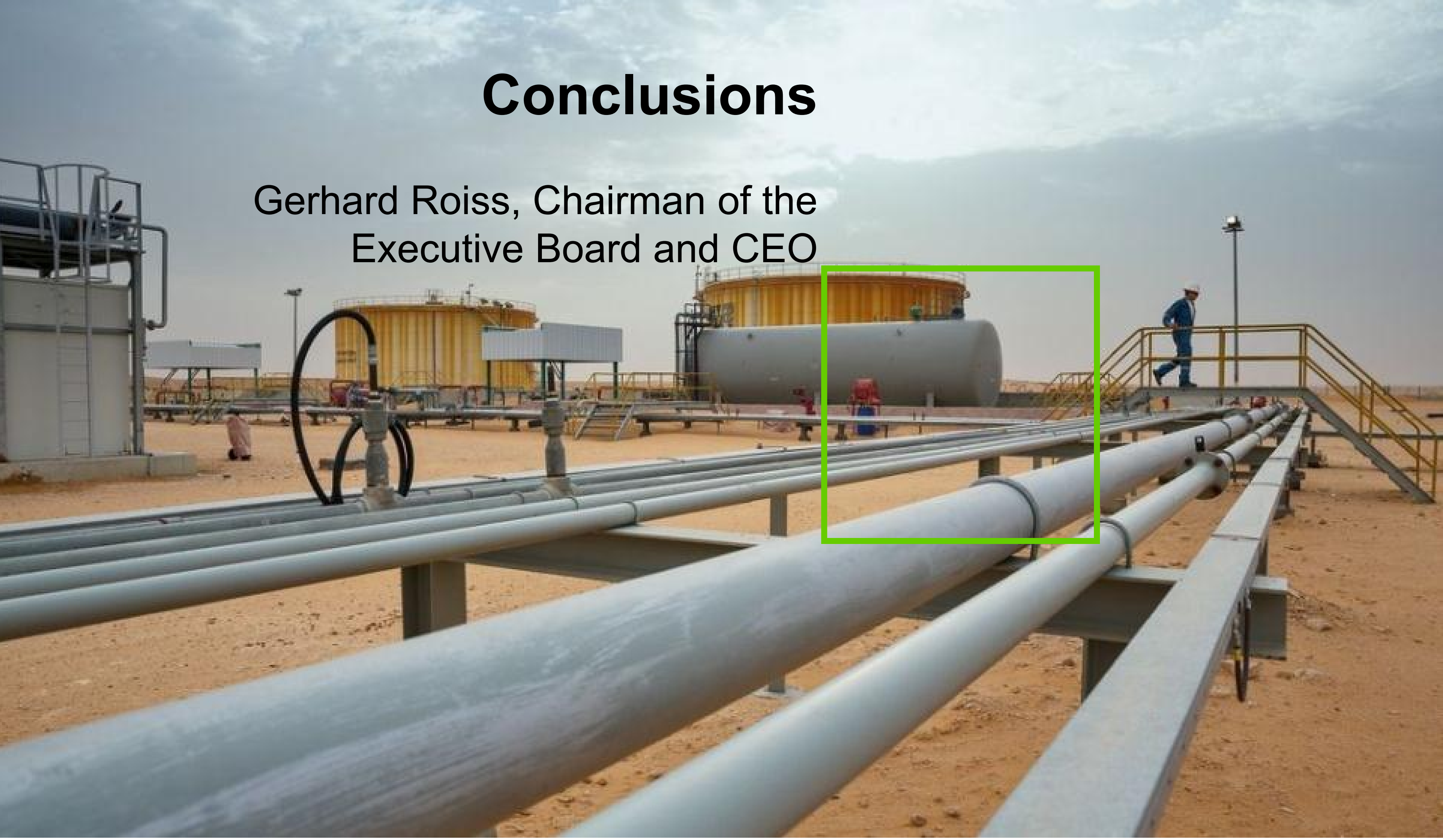
Conclusions

Gerhard Roiss, Chairman of the Executive Board and CEO



Moving more. Moving the future. OMV

Strategy “Profitable Growth”: H2/13 steps

E&P

- Deliver **key growth projects; ~70% of CAPEX** in E&P
  - Recommence drilling in the Black Sea
  - FID Nawara (Tunisia)
  - Production start Mehar and Latif (Pakistan)
  - 4 high impact exploration wells
- Continued **emphasis on exploration**

G&P

- **Improve competitiveness**, e.g. by aiming to finalizing gas supply renegotiations

R&M

- Progress **Petrobrazi modernization**
- Continue **R&M divestment program**

- **E&P pipeline growth** to deliver 350 kboe/d by 2016
- **Downstream optimization** on track
- **Excellent cash flow** secures financing of **E&P growth**

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