OMV results January – September and Q3 2013

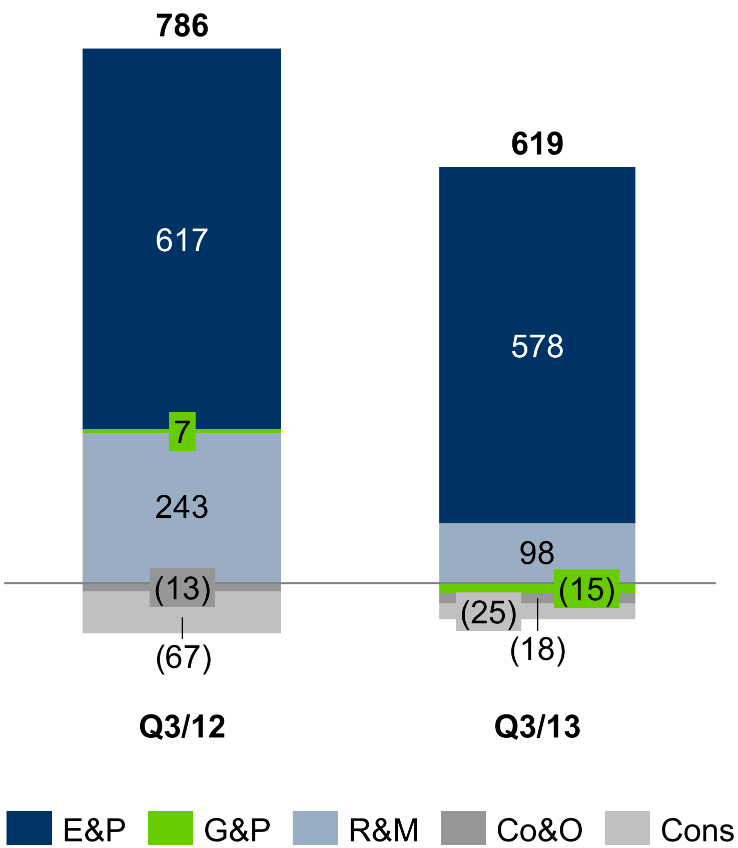
David C. Davies,
Deputy Chairman of the Executive Board and CFO

November 7, 2013

Moving more. Moving the future. OMV

Q3/13 Highlights

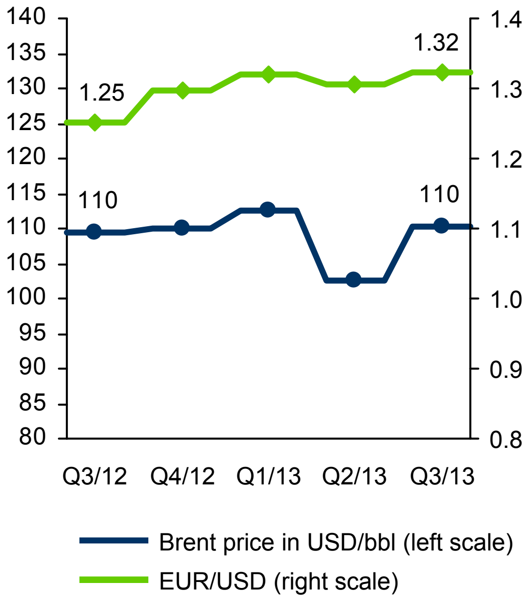
Clean CCS EBIT in EUR mn



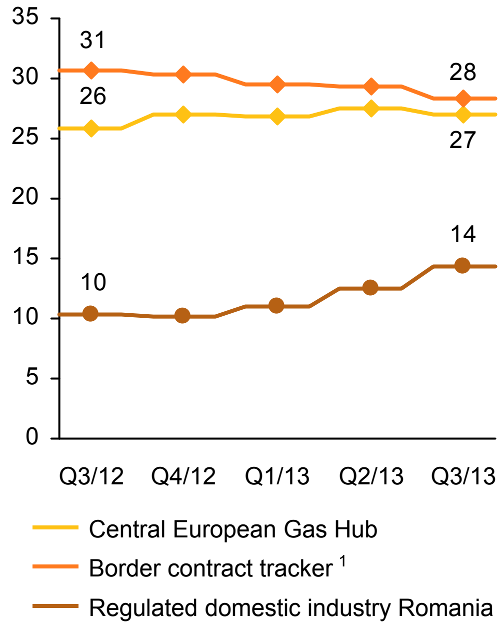
- Significant asset acquisition from Statoil closed end of October
- Average Brent oil price at USD 110/bbl
- Production at 275 kboe/d
- Lower sales volumes mainly in Libya and UK
- G&P burdened by negative gas margins and lower power result
- Considerably lower OMV indicator refining margin
- Good contribution of marketing business
- Gearing ratio decreased to ~12%

Economic environment

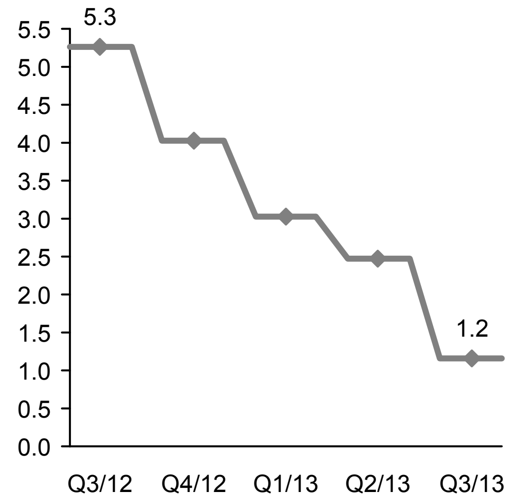
Oil price and EUR/USD



Gas prices in EUR/MWh



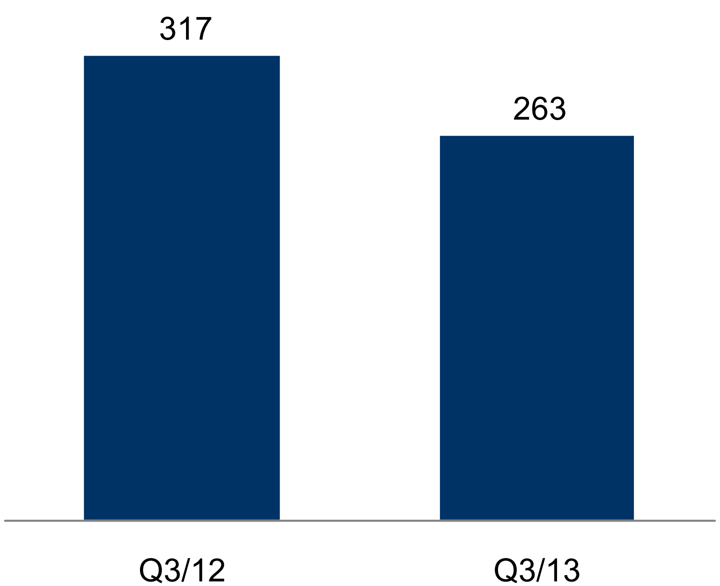
OMV indicator refining margin in USD/bbl



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

Results in Q3/13

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



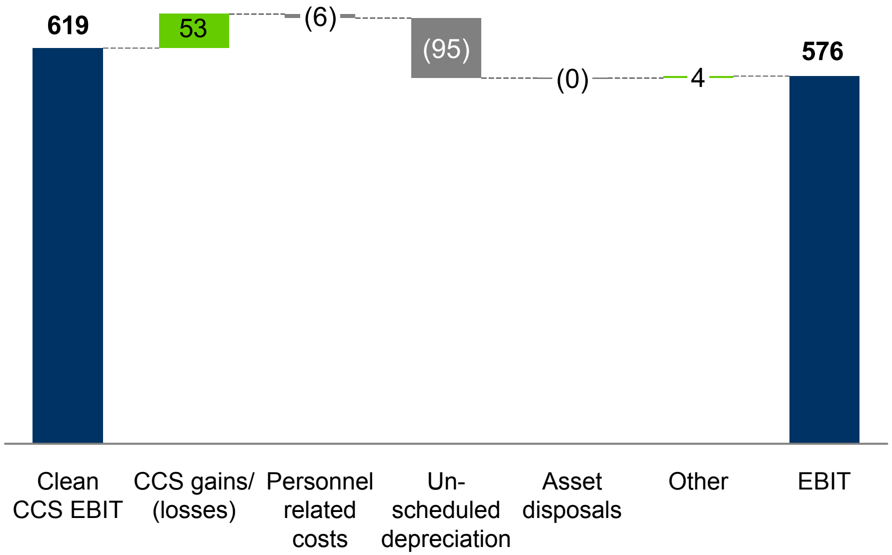
in EUR mn	Q3/13	Q3/12	△
EBIT	**576**	**779**	**(26)%**
Financial result	(66)	(106)	(38)%
Taxes	(134)	(272)	(50)%
Effective tax rate	26%	40%	(35)%
Net income	375	401	(6)%
Minorities and hybrid capital owners	(147)	(90)	63%
Net income attributable to stockholders [1]	**229**	**311**	**(27)%**
EPS (in EUR)	0.70	0.95	(27)%
Clean EBIT	673	817	(18)%
Clean CCS EBIT	**619**	**786**	**(21)%**
Clean CCS net income attributable to stockholders [1]	**263**	**317**	**(17)%**
Clean CCS EPS (in EUR)	0.81	0.97	(17)%

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.

Special items and CCS effect

Q3/13
in EUR mn

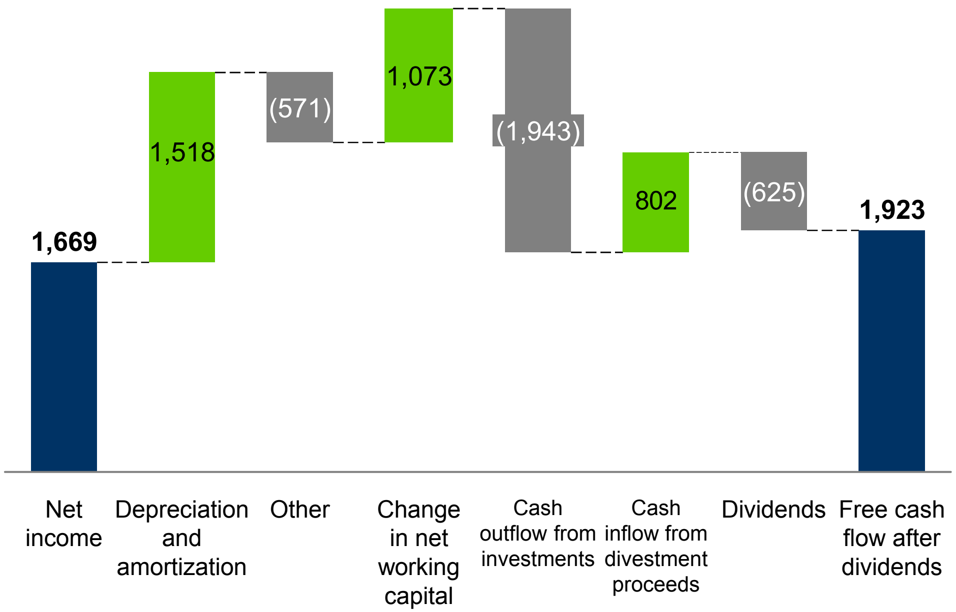


in EUR mn	Q3/13	Q3/12
Clean CCS EBIT	**619**	**786**
CCS gains/(losses)	53	30
Clean EBIT	**673**	**817**
Personnel related costs	(6)	(2)
Unscheduled depreciation	(95)	(15)
Asset disposals	(0)	6
Other	4	(26)
Total special items	**(97)**	**(38)**
EBIT	**576**	**779**

- Positive CCS effect in Q3/13 due to the increase in crude oil prices
- Special items mainly coming from asset write-off in the Kurdistan Region of Iraq (oil part of the Bina Bawi asset) and of certain Austrian retail assets

Cash flow

9m/13
in EUR mn

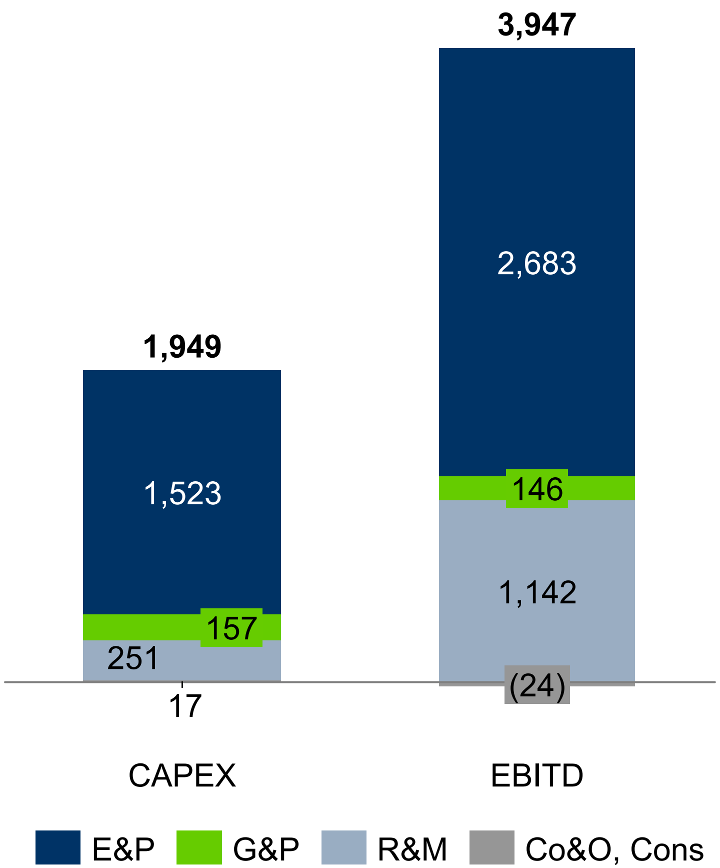


in EUR mn	9m/13	9m/12	△
Net income	1,669	1,387	20%
Depreciation and amortization	1,518	1,549	(2)%
Other	(571)	(288)	98%
Sources of funds	2,616	2,648	(1)%
Change in net working capital	1,073	121	n.m.
Cash flow from operating activities	**3,689**	**2,769**	**33%**
Cash flow used in investment activities	(1,141)	(1,513)	(25)%
Free cash flow	**2,548**	**1,256**	**103%**
Free cash flow after dividends	**1,923**	**630**	**n.m.**

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

CAPEX and EBITD

9m/13
in EUR mn



Key investments in Q3/13

- Petrom drilling, workovers and field redevelopments
- Field developments in Norway (Aasta Hansteen and Edvard Grieg)
- Field redevelopments in Austria
- Schiehallion and Rosebank field (re)developments in UK

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

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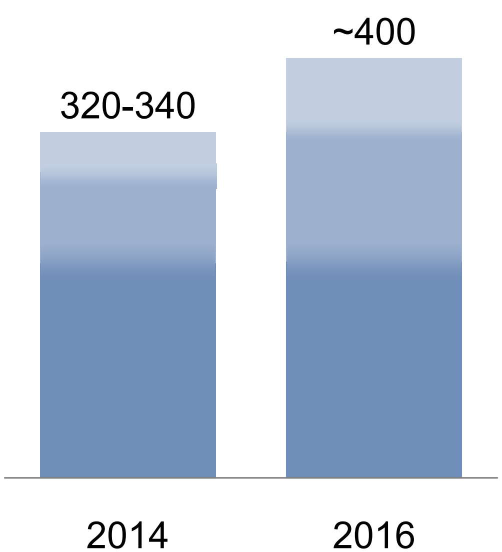
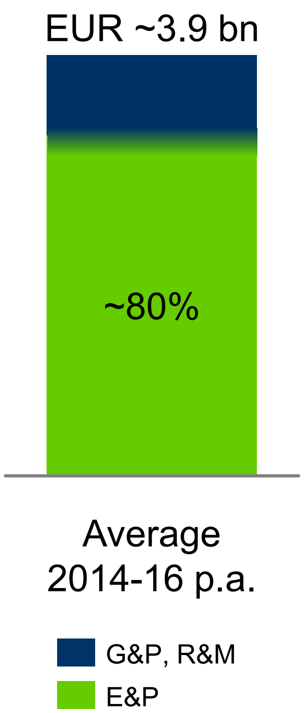
Mid-term guidance

Production
kboe/d



Group CAPEX



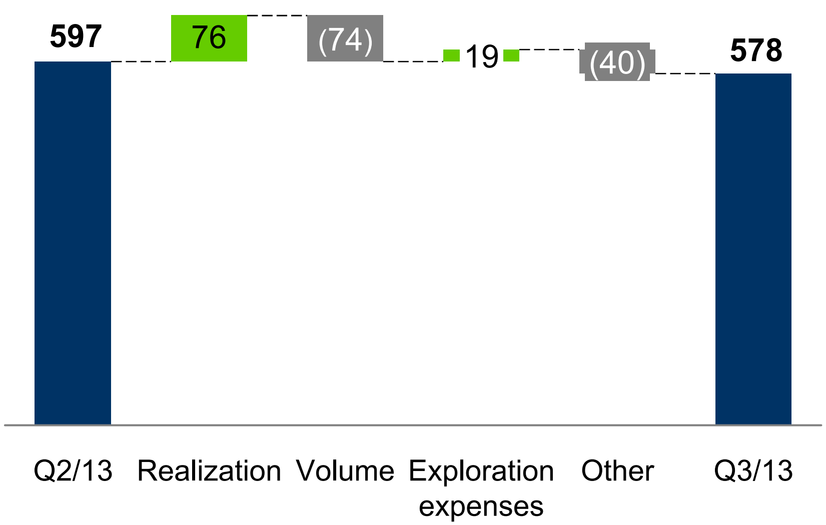
- Group investment program over the next three years will be funded by operating cash flow and planned divestments
- Dividend to increase in line with net income attributable to stockholders (payout ratio 30%)
- Gearing ratio ≤30%
- Group tax rate ~40%

Assuming market conditions similar to those currently prevailing.

Exploration and Production Clean EBIT

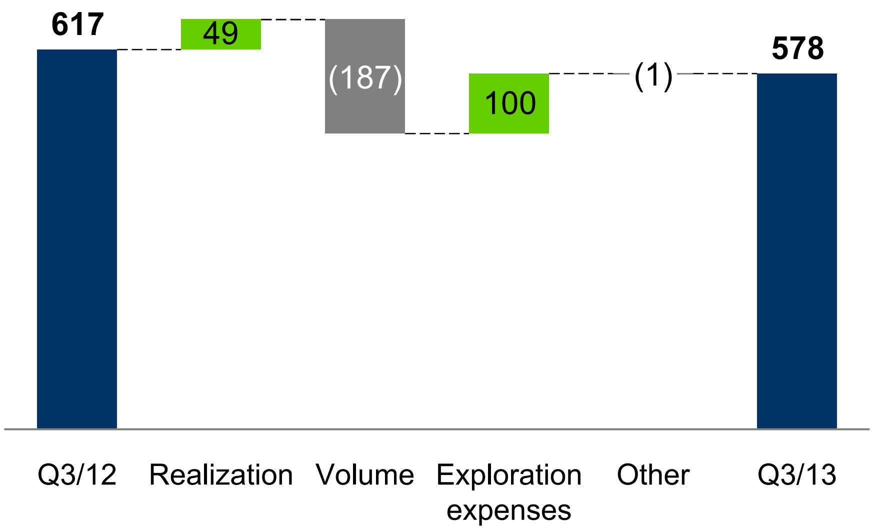
in EUR mn

Q3/13 vs. Q2/13



- Higher oil and gas prices
- Lower sales volumes in Libya and Tunisia
- Lower exploration expenses due to fewer seismic activities and lower write-offs
- Higher depreciation in Romania and Tunisia

Q3/13 vs. Q3/12



- Higher realized oil and gas prices, partly offset by negative impact from FX rates
- Lower sales volumes mainly in Libya and UK
- Lower exploration expenses mainly in the Kurdistan Region of Iraq

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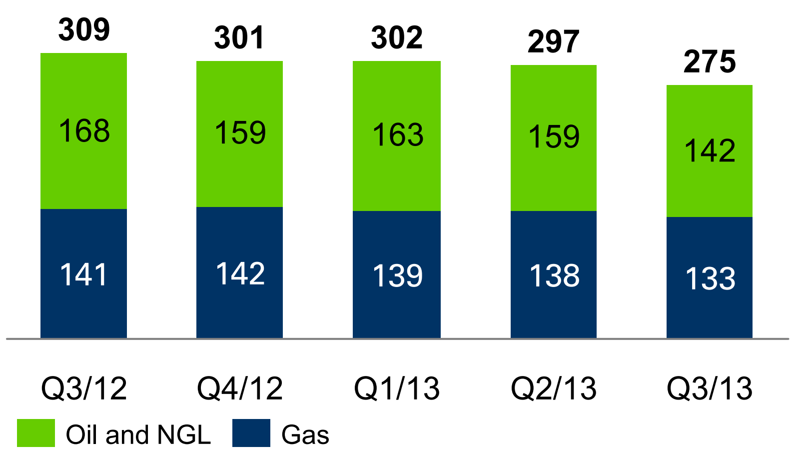
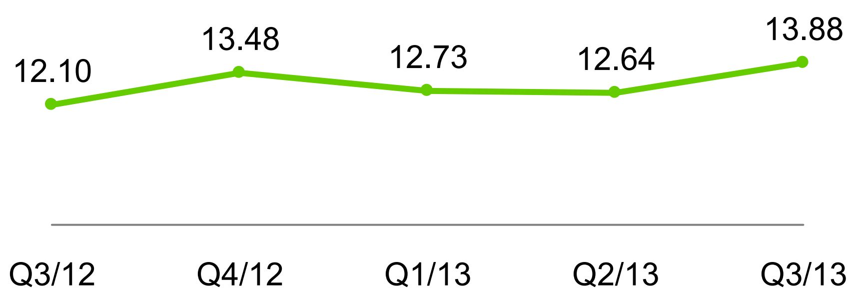
Exploration and Production Key Performance Indicators

Hydrocarbon production (1,000 boe/d)



OPEX in USD/boe

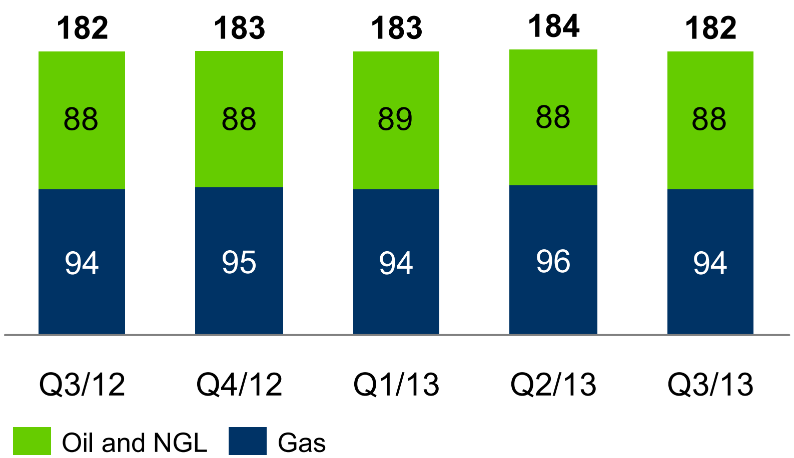


Q3/13 vs. Q2/13

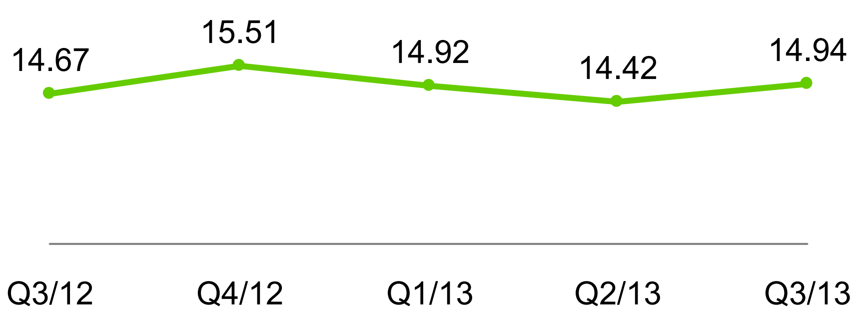
- Production down by 7%
  - Security problems and strikes in Libya and Yemen
  - Maintenance works and key equipment replacement at the Maari field in New Zealand
- Production costs higher mainly due to lower production and higher service costs

Exploration and Production
Petrom group

Hydrocarbon production (1,000 boe/d)



OPEX in USD/boe



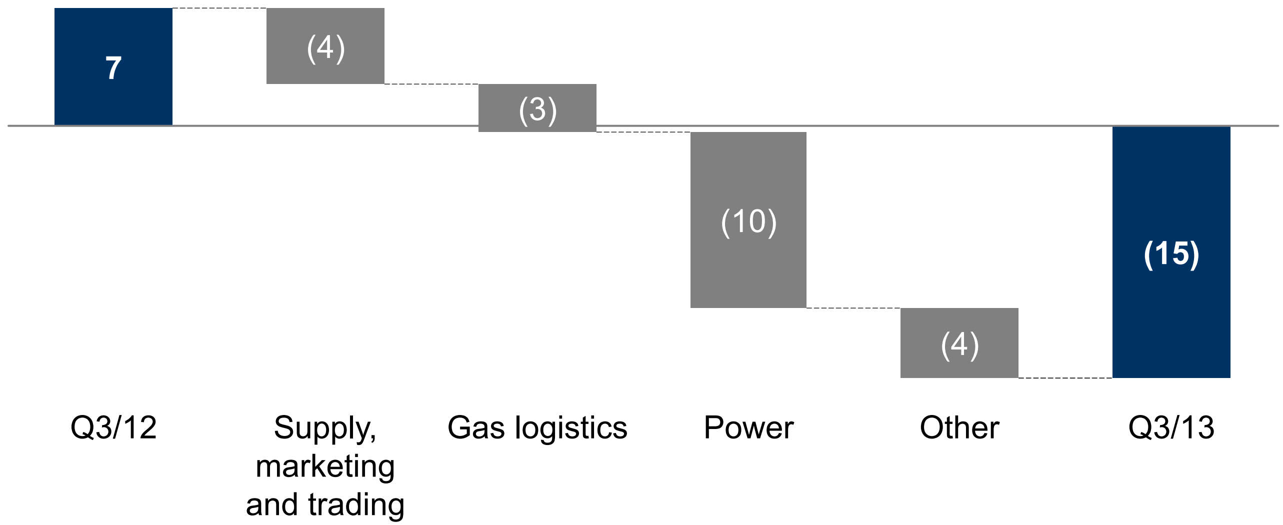
Q3/13 vs. Q2/13

- Clean EBIT of EUR 348 mn up by 17%, mainly due to
  - higher oil and gas prices
  - higher oil sales
- Romanian production slightly down vs. Q2/13, however, in 9m/13 1% above same period last year
- Production costs increased vs. Q2/13 due to higher service costs, however, productions costs in 9m/13 decreased by 4% vs. 9m/12

Gas and Power
Clean EBIT

in EUR mn

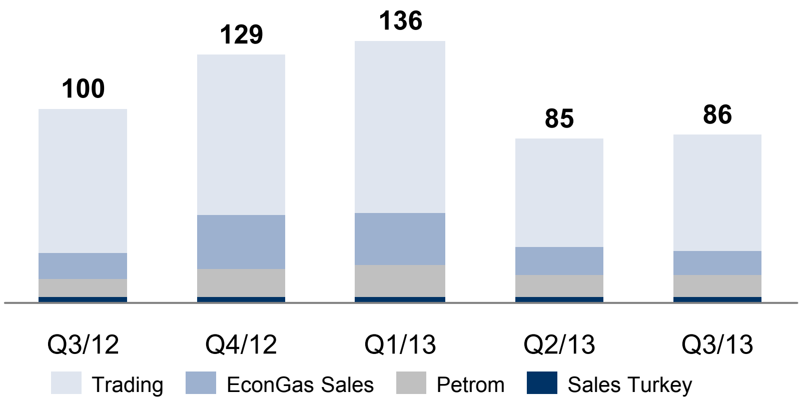
Q3/13 vs. Q3/12



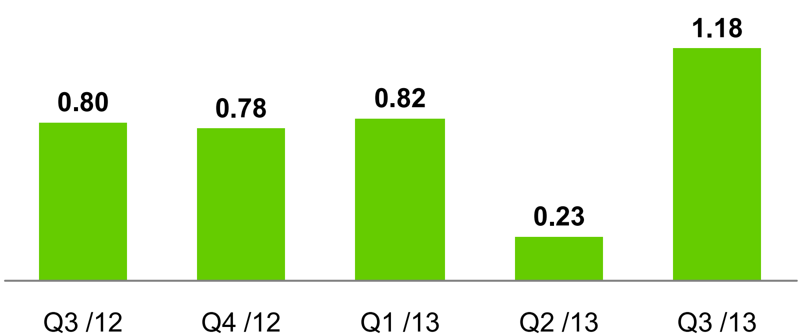
- Negative gas margin and gas sales volumes decrease
- Weaker result contribution of the storage business in gas logistics
- Power result burdened by lower spark spreads

Gas and Power
Key Performance Indicators

Gas sales volumes in TWh



Net electrical output in TWh



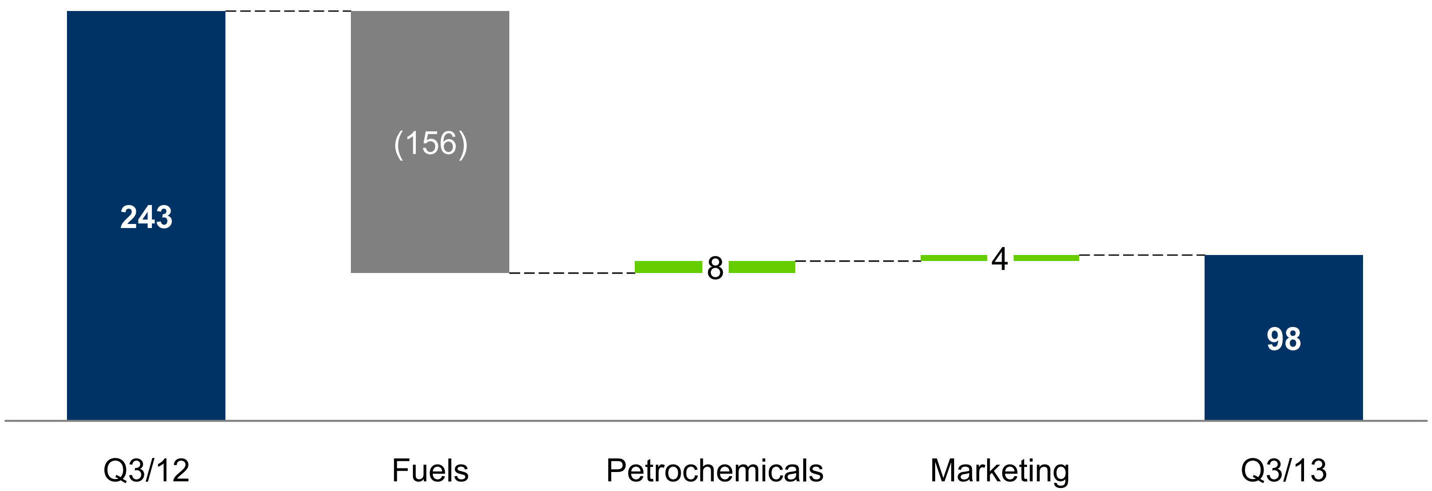
Q3/13 vs. Q3/12

- Total gas sales volumes down by 14% driven by reduced trading activities
- Petrom gas sales volumes increased by 22%
- Gazprom contract renegotiation progressed
- Statoil contract adjusted as of October 1, 2013
- Operations started at the gas-fired power plant in Samsun (Turkey)

Refining and Marketing
Clean CCS EBIT

in EUR mn

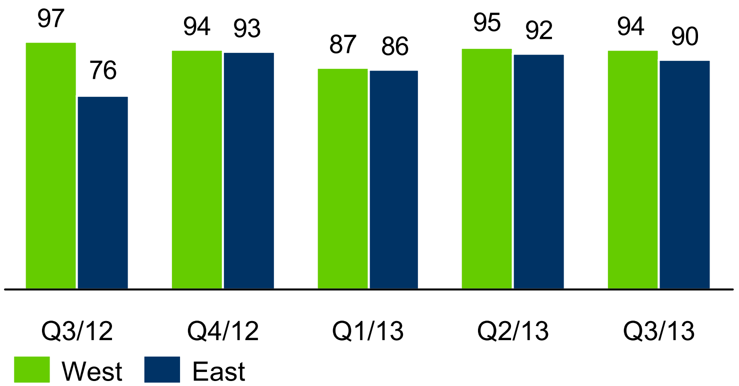
Q3/13 vs. Q3/12



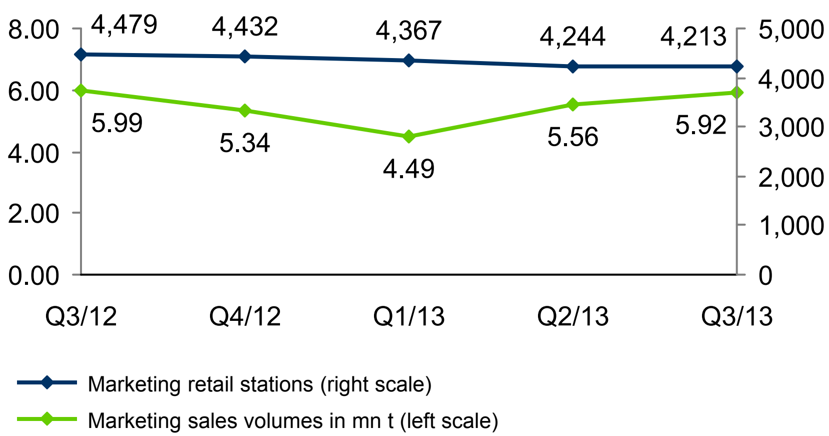
- Considerably lower OMV indicator refining margin
- Better petrochemicals margins
- Good marketing result due to slightly better retail margins

Refining and Marketing Key Performance Indicators

Refining utilization rate in %



Marketing



Q3/13 vs. Q3/12

- Overall refining utilization rate remained high
- Marketing sales volumes decreased slightly
- Further filling station network optimization
- Strong contribution from Borealis including Borouge

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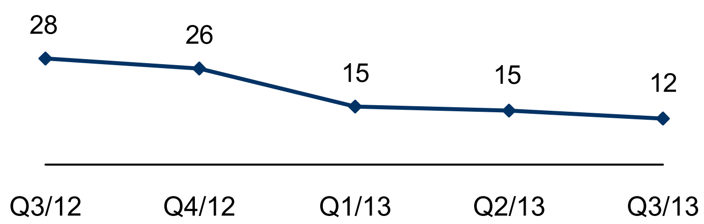
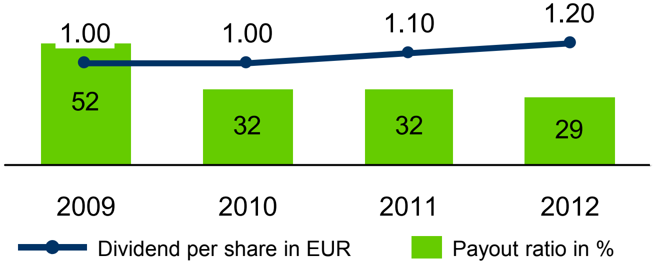
Key financial indicators

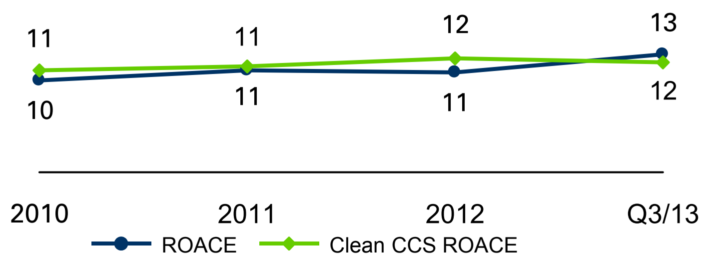
Gearing ratio in %



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

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Outlook 2013

Market environment

- Brent price: Above USD 100/bbl on average
- European gas market: Hub prices increasingly determine market prices
- Refining margins: Lower levels than in 2012

Business outlook

- CAPEX: Around EUR 2.8 bn excluding Statoil asset acquisition; ~75% in E&P
- Further deliver “energize OMV“ program
- Production expected somewhat below 2012
- Further increase in exploration and appraisal expenditure to EUR ~700 mn
- Renegotiations of the long-term gas supply contract with Gazprom continue
- Progress the Petrobrazi refinery modernization
- Continue the R&M divestment program

Exploration and Production

Jaap Huijskes, Executive Board member responsible for E&P

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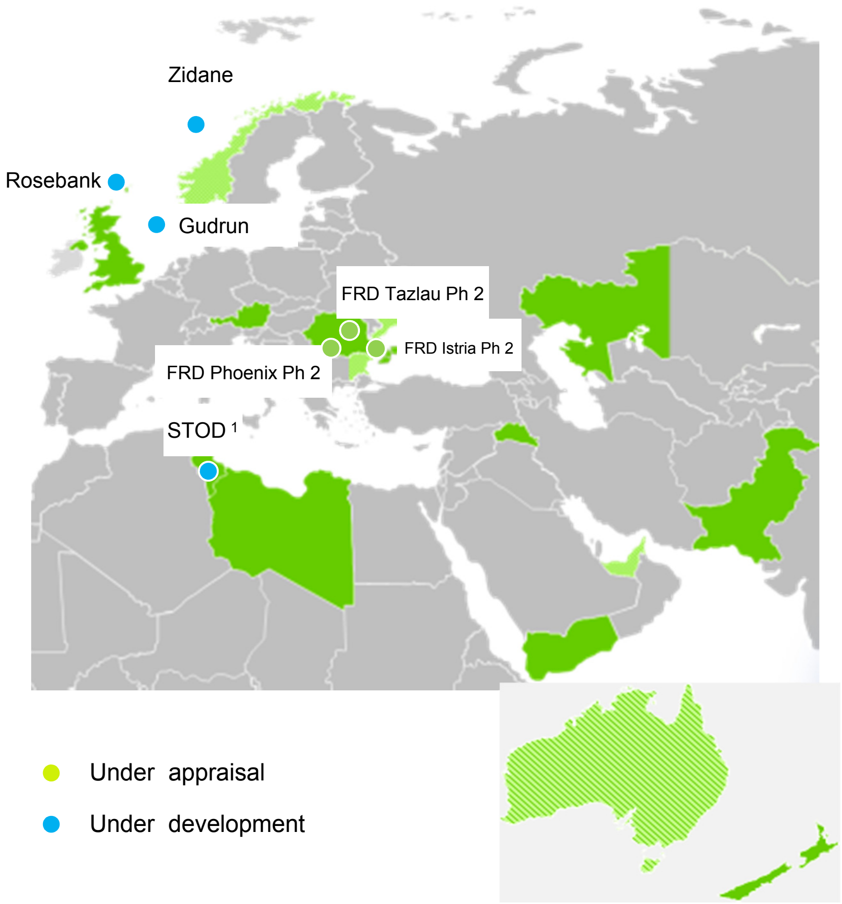
Acquisition of offshore assets in Norway and UK from Statoil

USD ~2.65 bn transaction value

- **Production:** Shares of 2 assets in Norway
  - Gullfaks (19%) producing
  - Gudrun (24%) starting production in 2014
- **Development:** Increased share in 2 UK assets
  - Schiehallion: +5.88%; starting production in 2016
  - Rosebank: +30%; starting production in 2018
- **Exploration:** Option to farm into additional licenses
- **Closing**: October 31st, effective date of the transaction is January 1, 2013
- **2P reserves** will climb by about 320 mn boe
- **Production:**
  - ~25,000 boe/d as of November 1, 2013
  - Expected to rise to ~40,000 boe/d during 2014
  - Planned increase to approximately 58,000 boe/d during 2016

E&P project update Q3/13



[1] South Tunisian Oil Development.

- **Further strengthened project pipeline to >1bn boe**
- **~500 mn boe under appraisal**
  - FRDs in Romania filling the funnel
- **~580 mn boe under development**
  - Projects **moved into development phase**: FRDs in Romania
  - **New projects**: Gudrun (Norway)
- **Updated FID's schedule:**
  - South Tunisian Oil Development (Tunisia): Q4/13
  - Zidane (Norway): H1/14
  - Rosebank (UK): 2014

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]	Tunisia	Oil	2012	~4	~2	t.b.d.	50.0	OP
FRD Romania	Romania	Oil/Gas	2013-2015	~80	~17	~450-500	100.0 [2]	OP
Mehar	Pakistan	Gas/NGL	2013	~15	~5	~100	59.2	OP
Latif	Pakistan	Gas	2013	~6	~6	~30	~33.3	OP
FRD Austria	Austria	Oil/Gas	2013-2015	~15	~9	~260	100.0	OP
Maari Growth	New Zealand	Oil	2014	~10	~7	~150	69.0	OP
Habban	Yemen	Oil	2014	~28 [3]	~10	~820 [3]	44.0	OP
Gudrun	Norway	Oil	2014	-	~15	n/a	24.0	NO
Nawara	Tunisia	Gas	2016 [4]	40-50	~10 [4]	n/a	50.0	OP
Schiehallion	UK	Oil	2016	~42	~12	~740	~11.8	NO
Edvard Grieg	Norway	Oil	2016	~38	~19	~640	20.0	NO
Aasta Hansteen [5]	Norway	Gas	2017	~43	~18	~810	15.0	NO
Zidane	Norway	Gas	2018	~20	~7	t.b.d.	20.0	NO
Rosebank [6]	UK	Oil	2018	~125-150	~50	~3,750	50.0	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.
[5] incl. Polarled [6] Divestment of ~10-20% stake planned.

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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		Gas	t.b.d.	t.b.d.	36.0	OP
FRD Romania		Oil/Gas	2014-2017	150-200	100.0 [1]	OP
FRD Austria		Oil/Gas	2015	~5	100.0	OP
WoS [2] / CNS [3]		Oil/Gas	2018-2020	~40-60	9.7-35.0	OP NO
Shuwaihat		Gas/NGL	end of decade	t.b.d.	50.0 [5]	NO
Domino		Gas	end of decade	0.75-1.5 tcf	50.0 [1]	NO
Zola		Gas	end of decade	t.b.d.	20.0	NO

All figures net to OMV.

[1] Via Petrom. [2] West of Shetland (Cambo, Tornado). [3] Central North Sea (Jackdaw).

[4] Technical Evaluation Agreement. [5] 50% of expected gross volumes in appraisal phase to OMV.

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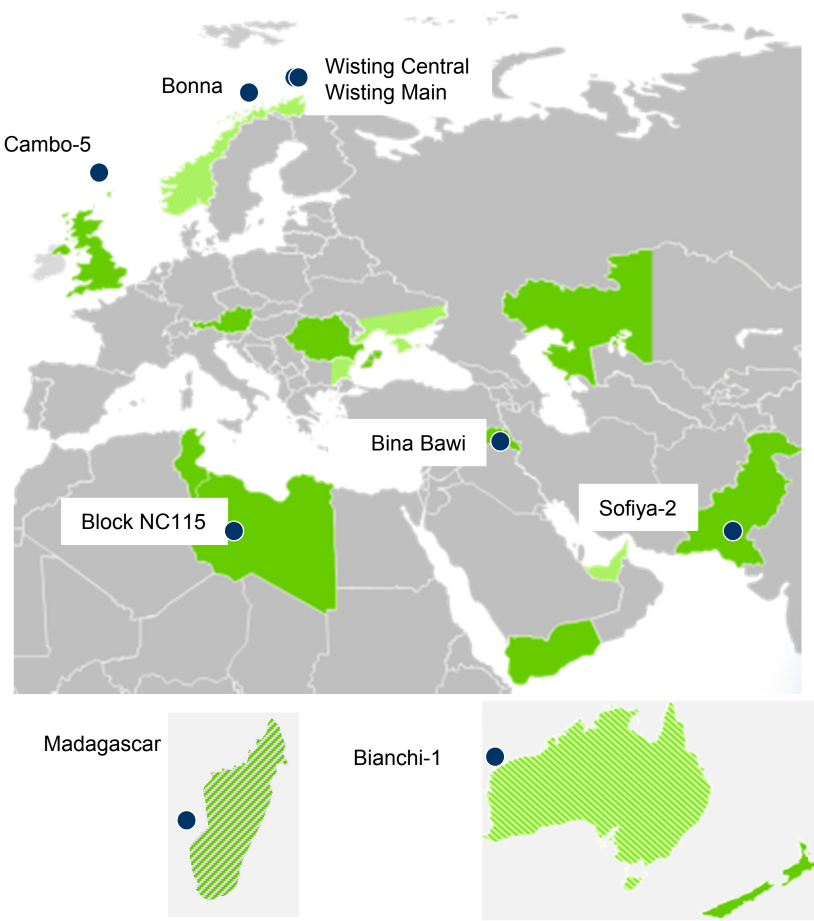
Exploration update Q3/13



[1] 5 in Faroe Islands, 2 in Norway; subject to authority approval.

Seismic:
- **Bulgaria:** ~7,800 km² 3D seismic (60% finished)

Newly secured acreage:
- Statoil acquisition – exploration opportunities [1]
- Madagascar country entry

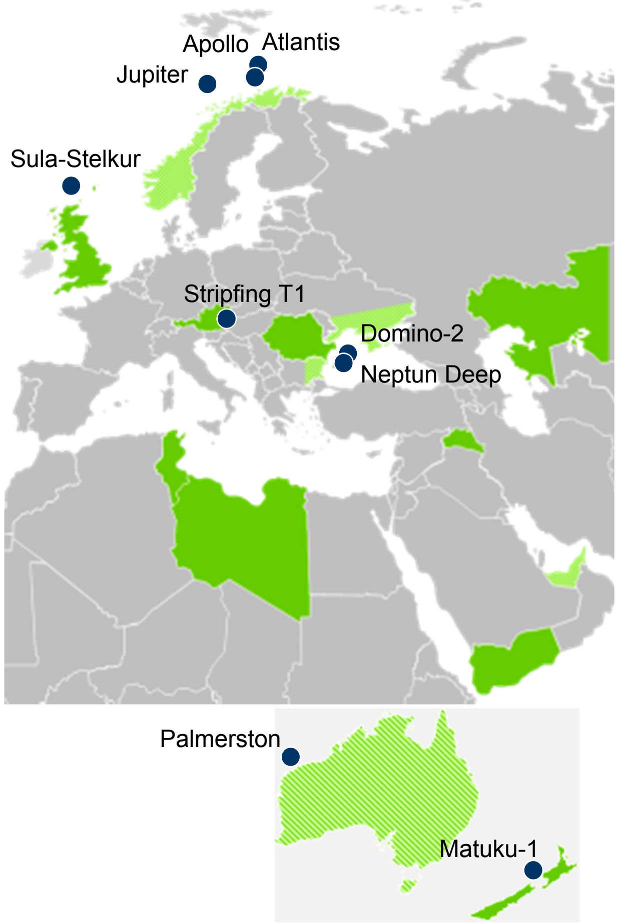
Other exploration drilling:
- Wisting Central exploration well - oil discovery
- Sofiya – successful, encountered hydrocarbons
- Libya – successful exploration well encountered oil

High impact drilling results

Well	Country	Basin/Block	Type	Spud date	Results	WI
Cambo-5		West of Shetland	A	Q2/13	dry	15%
Bianchi-1		Carnarvon Basin	A	Q2/13	gas	20%
Bina Bawi 4&5		Zagros Fold Belt	A	Q2/13	sour gas	36%
Bønna		Barents Sea	E	Q3/13	dry	20%
Wisting Central		Barents Sea	E	Q3/13	oil	25%
Wisting Main		Barents Sea	E	Q3/13	dry	25%

High impact wells [1] in 2013/14

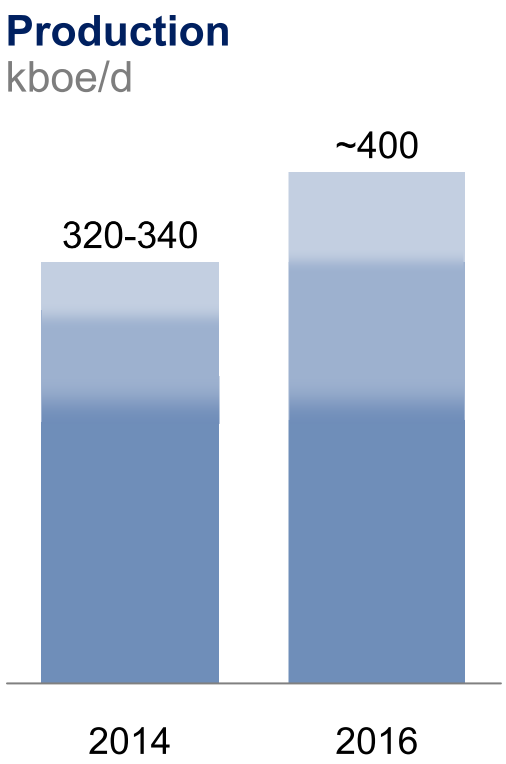
- Exploration and Production
- Exploration



Well	Country	Basin/Block	Type [2]	Spud date	Working interest	Operated
Palmerston-1		Carnarvon Basin	E	H2/14	~33%	NO
Apollo		Barents Sea	E	H1/14	20%	NO
Atlantis		Barents Sea	E	H1/14	20%	NO
Jupiter		Barents Sea	E	H2/14	66%	OP
Domino-2		Black Sea	-	mid-2014	50% [3]	NO
Neptun Deep		Black Sea	E	H2/14	50% [3]	NO
Matuku-1		Taranaki Basin	E	Q4/13	65%	OP
Sula-Stelkur		WoS (Faroe Islands)	E	H2/14	30% [4]	NO
Stripfing T1		Vienna Basin	E	H2/14	100%	OP

[1] >25 mn boe net to OMV. [2] Exploration/Appraisal. [3] Via Petrom. [4] Subject to authority approval.

Mid-term production guidance



- Production grows to ~400 kboe/d in 2016
- Organic portfolio (as of Sept. 2011) will deliver ~350 kboe/d in 2016
- Romania and Austria production kept flat at 200-210 kboe/d out to 2016
- Exploration and appraisal expenditures flat at EUR ~700 mn p.a.
- Reserve replacement rate (three-year average) >100% by 2016

Gas and Power

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

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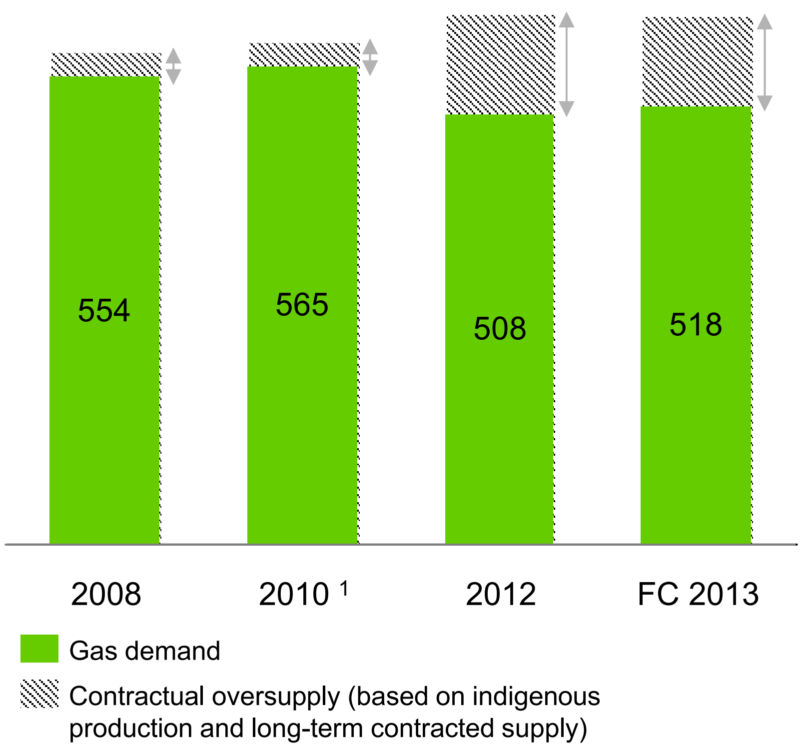
European gas market environment expected to remain oversupplied

EU 27 and Turkey: Contracted gas supply exceeds demand, bcm



[1] below average temperature

Forecast 2013 slightly above 2012

- H1/13 demand up due to lower than average temperature
- Gas to power demand expected to remain weak

Mid-term outlook

- **Demand: Relatively flat** until 2020
  - North West Europe flat
  - Turkey with moderate growth

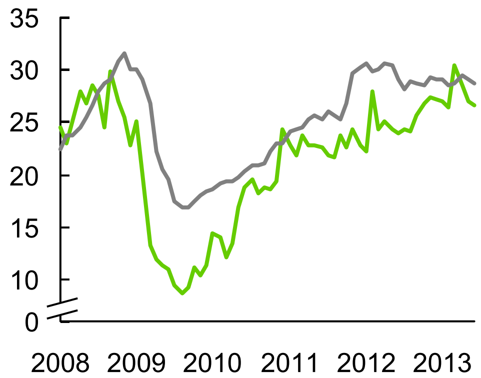
Source: Eurogas, OMV.

Consequences of oversupplied markets

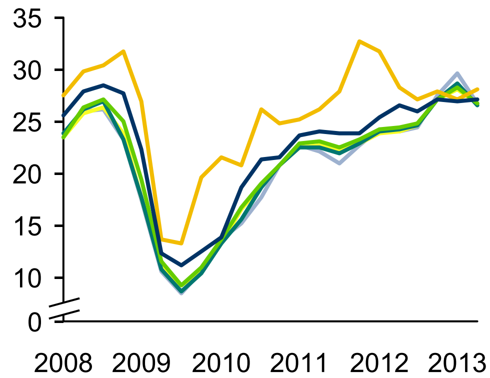
EUR/MWh

NCG — Border contract tracker — NBP — TTF — Zeebrugge — PSV — CEGH

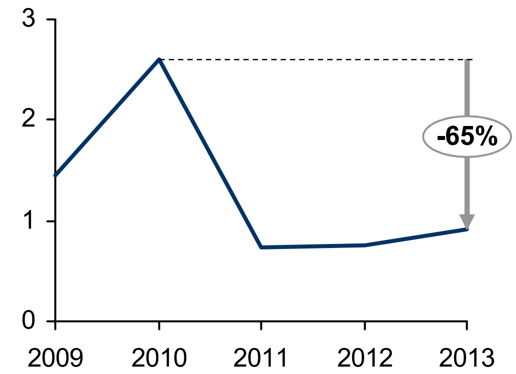
Long-term supply decoupled from oil-indexation



Hub prices across Europe converge



Summer-winter spreads fall substantially



Current impact on OMV's gas business

- **Negative margins** on long-term contracts
- Substantially **lower regional arbitrage** potential
- **Low storage cost recovery** for EconGas
- **Weak demand** for storage capacity at **lower prices**

Source: CERA

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Strong supply position essential in competitive market

Renegotiation of long-term gas supply contracts

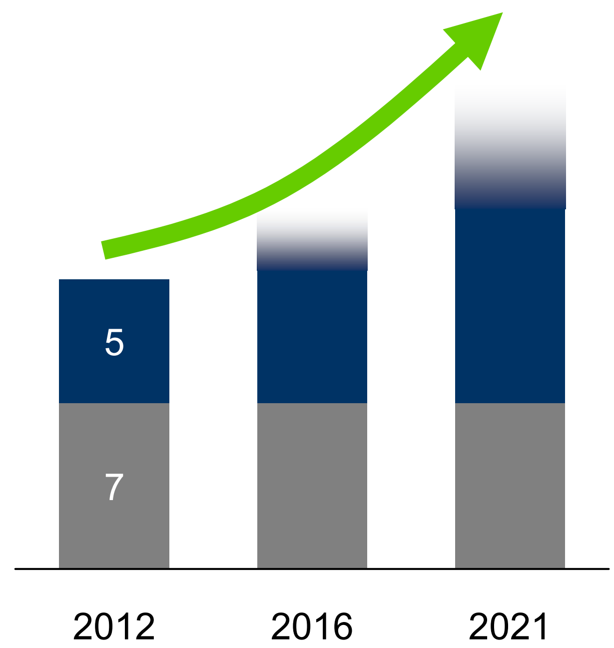
Statoil

- Adjusted terms of agreement effective Oct. 2013
- Priced towards relevant gas market indices

Gazprom

- Renegotiations of the long-term gas supply contract with Gazprom ongoing

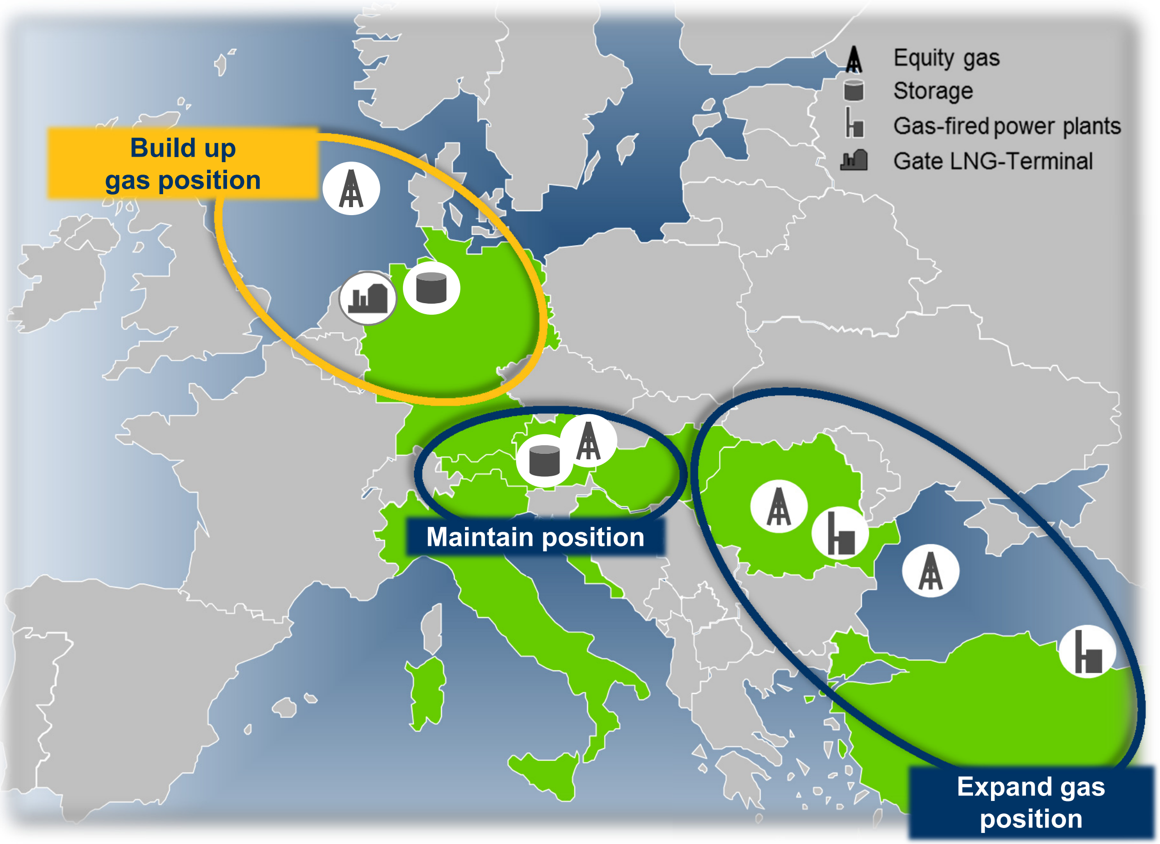
Focus on equity gas: Significantly increase equity gas share



2 growth regions in Europe: North Sea and Black Sea

[1] Based on annual contracted quantity of long-term contracts.

North Sea: Recent Statoil asset acquisition contributes to OMV's increasing integrated gas position in Europe

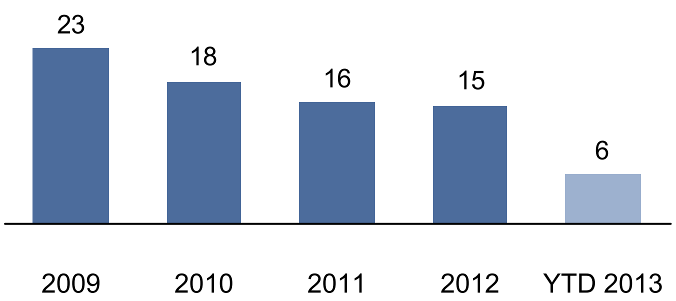


- **First significant gas volumes 2013/14** due to recent Statoil asset acquisition
- Additional volumes from **Aasta Hansteen and Zidane**
- **Black Sea** expected to add **~3 bcm/y** to supply portfolio

Gas to Power: Spark spreads affected by weak demand

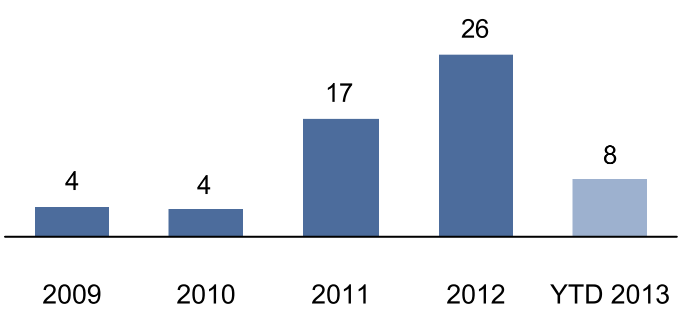
EUR/MWh

Turkey: Low spark spreads driven by weak power demand



- **Short-term outlook** expected to remain **challenging**
  - Moderate demand growth
  - Substantial capacity additions (~4 GW in 2013)
- **Mid-term upside** in growing Turkish power market
- **Competitive advantage** of Samsun
  - Well positioned to meet requirements of the balancing market due to flexibility at leading levels

Romania: Low spark spreads driven by strong renewable production



Note: Domestic gas used for calculation from September 2012 onwards

- **Increase of domestic gas price** will put **pressure** on spark spread
- Strongly **integrated position** in Romania

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"Integrated gas": G&P will focus on two main strategic priorities

1 Future growth potential

Best monetization of gas portfolio

- **Prepare for additional equity gas** from North Sea and Black Sea and identify target markets and assets needed
- **Optimize value of integrated supply portfolio** including existing long-term contracts

2 Past investment decisions

Review and optimize asset portfolio to increase profitability

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