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EANS-News: OMV Aktiengesellschaft / OMV issues Eurobonds and announces a tender offer on upcoming maturities

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Capital measures/OMV / Oil / Gas / Austria / Bond

Wien (euro adhoc) - *OMV raises EUR 1.5 bn in long-dated Eurobonds at highly attractive financing terms
*OMV announces tender offers for its 2014 Eurobond as well as its 2014 and 2016 Schuldschein loan notes to further extend its debt maturity profile

Today, OMV has launched and priced a new EUR 1.5 bn dual tranche Eurobond transaction. The transaction comprises of a EUR 750 mn 10 year tranche, with a coupon of 2.625% and a maturity date of September 27, 2022 and a EUR 750 mn 15 year tranche, with a coupon of 3.50% and a maturity date of September 27, 2027. The new bonds were issued via OMV's EUR 4 bn Euro Medium Term Note Program (EMTN) - a funding program that allows OMV to issue debt in the Euromarkets on a regular and continuous basis - and have denominations of EUR 100,000. The order book was significantly oversubscribed due to the strong investor demand. OMV has applied for these bonds to be listed in Luxembourg and Vienna.

In conjunction with the issuance of new Eurobonds, OMV has also launched tender offers for any and all of its EUR 1 bn 6.250% coupon Eurobond due in 2014 as well as its EUR 82 mn 5.39% and EUR 101 mn 5.97% Schuldschein loan notes respectively due in 2014 and 2016. The Eurobond tender offer will expire on September 26, 2012, while the Schuldschein loan note tender offer will expire on October 1, 2012.

The proceeds of the new Eurobonds will be used for general corporate purposes, including the funding of the tender offers and repayment of upcoming maturities.

David C. Davies, Deputy Chairman of the Executive Board and Chief Financial Officer of OMV, said: "The combined exercise of new long-dated Eurobonds issues in conjunction with liability management on upcoming maturities presented a unique opportunity for OMV to lock in long-term funding at historically attractive rates whilst further optimizing our debt maturity profile. Furthermore, these transactions support our strong investment grade credit rating".

Barclays, Erste Group Bank, JP Morgan Securities plc and UniCredit Bank Austria acted as joint bookrunners on the Eurobond transaction. Citigroup and Société Générale Corporate & Investment Banking are acting as Dealer Managers on the 2014 Eurobond tender offer, and Landesbank Baden-Württemberg is acting as tender agent on the tender of the Schuldschein loan notes.

OMV Aktiengesellschaft

With Group sales of EUR 34.05 bn and a workforce of 29,800 employees in 2011, OMV Aktiengesellschaft is one of Austria's largest listed industrial companies. In Exploration and Production, OMV is active in two core countries, Romania and Austria, and holds a balanced international portfolio. OMV had proven oil and gas reserves of approximately 1.13 bn boe as of year-end 2011 and a production of around 288,000 boe/d in 2011. In Gas and Power, OMV sold approximately 272 TWh of gas in 2011. In Austria, OMV operates a 2,000 km long gas pipeline network with a marketed capacity of around 101 bcm in 2011. With a trading volume of around 39 bcm in 2011, OMV's gas trading platform, the Central European Gas Hub, is amongst the most important hubs in Continental Europe. In

Refining and Marketing, OMV has an annual refining capacity of 22.3 mn t and, as of year-end 2011, approximately 4,500 filling stations in 13 countries including Turkey. OMV holds a 51% stake in the Romanian energy company OMV Petrom S.A., a 36% stake in Borealis AG, one of the world's leading producers of polyolefins, in total 59% of EconGas GmbH and 45% of the refining network Bayernoil. OMV further strengthened its position through the ownership of a 97% stake in Petrol Ofisi, Turkey's leading company in the oil products retail and commercial business.

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