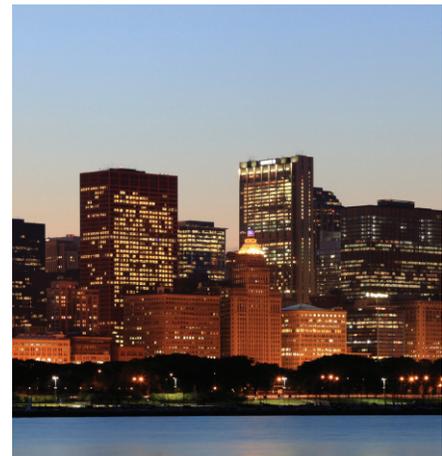


2012 ENERGY EFFICIENCY INDICATOR SURVEY: FRANCE RESULTS

The Johnson Controls Institute for Building Efficiency conducts an annual Energy Efficiency Indicator survey tracking the energy priorities, practices and investments being made by executive decision-makers for buildings in markets around the world. In the 2012 survey, 3,500 executives from the commercial, industrial and institutional sectors provided insights into their energy management practices, the barriers to energy efficiency they face, and what motivates them to act. This is the third year the survey has extended to Europe, where there were 944 respondents this year. Respondents were concentrated in the UK (331), Germany (307) and France (296). The complete results can be found at www.InstituteBE.com.

FINDINGS FROM THE 2012 FRENCH EEI SURVEY RESPONSES:

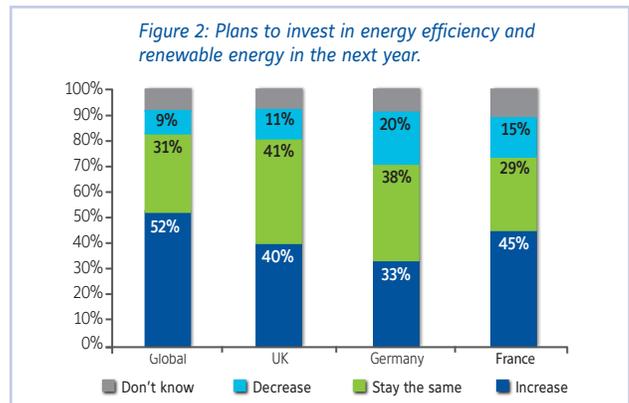
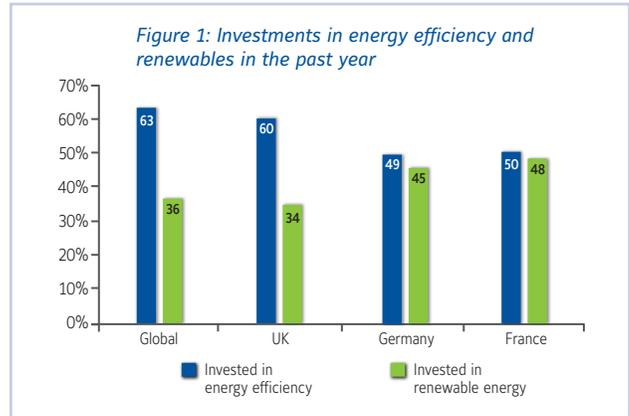
- There was a 19% jump in interest in energy efficiency among building executives in France: 72% said energy management was very or extremely important to their organizations compared to 53% in 2011. Seventy four percent said they were paying more attention to energy in 2012 than in 2011.
- Fifty percent of French respondents said they had invested in energy efficiency in the past year, and 48% had invested in renewable energy.
- French executives led Europe in plans to invest in energy efficiency and renewable energy in 2012: 45% of business executives planned to increase spending, while 29% expected investment to stay the same. This increase in investment is more than in the other EU countries but remains lower than the global average (52%) (Figures 1 and 2).
- Energy cost savings, increasing energy security, and greenhouse gas footprint reduction led as drivers for energy efficiency action.
- Sixty two percent of French executives said they had at least one certified green building, the highest among all EU countries. Forty percent of respondents planned to pursue green certification in new buildings, and 49% percent in existing buildings.
- The top three energy efficiency measures adopted in the past 12 months included: lighting improvements (49%), HVAC and/or controls improvements (48%), and onsite renewable energy (38%).
- When asked which on-site technologies they expected to see the greatest market adoption in the next 10 years, executives selected lighting technologies (36%), solar photovoltaics (30%), and advanced building materials (24%) as their top three choices.



OVERVIEW

The 2012 Global Energy Efficiency Indicator (EEI) survey reveals the energy priorities, practices, investment plans and barriers facing building decision-makers responsible for energy investments and activities in their companies. The global survey included nearly 3,500 facility managers and building executives and owners. The 2012 survey is the sixth global EEI survey conducted by Johnson Controls through its Institute for Building Efficiency.

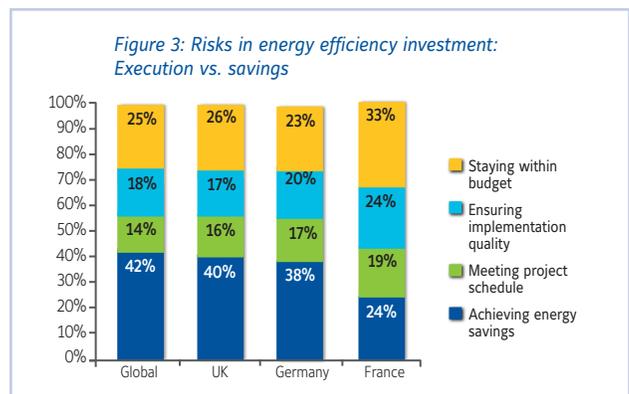
- The top barrier to pursuing energy efficiency in France was lack of funding to pay for improvements (21%), followed by insufficient payback or ROI (17%) and uncertainty regarding savings or performance (15%).
- France saw tighter payback requirements: The average allowable payback on efficiency projects was 3.0 years, versus 3.2 years in 2011.
- French executives saw budget overruns as the top risk in energy efficiency projects, followed by project implementation quality (Figure 3).
- When asked which energy policy would have the greatest impact on improving energy efficiency in buildings, 26% of executives said tax credits/incentives or rebates, 20% selected low-interest financing for energy upgrades, and 18% chose adoption of green appraisal standards that value efficiency.
- Sixty-nine percent of French respondents said they measured and recorded energy data at least weekly, and 18% reviewed and analyzed data at least weekly.
- The top three energy management practices already adopted in French respondents' facilities were: tracking and analyzing energy data (45%), performing energy audits of facilities or equipment (43%), and measuring and verifying energy project savings (42%).



SURVEY RESPONDENT DEMOGRAPHICS

To qualify for the EEI survey, respondents must have budget responsibility for at least one nonresidential building, and their responsibilities must include energy use, either through monitoring of usage or proposing or approving energy-related projects. The EEI survey is conducted anonymously.

Among French respondents, 54% classified their facilities as commercial, 17% as institutional (government buildings, hospitals and schools), and 28% as industrial. Forty-eight percent of respondents managed more than 500,000 square feet.



The Institute for Building Efficiency is an initiative of Johnson Controls providing information and analysis of technologies, policies, and practices for efficient, high performance buildings and smart energy systems around the world. The Institute leverages the company's 125 years of global experience providing energy efficient solutions for buildings to support and complement the efforts of nonprofit organizations and industry associations. The Institute focuses on practical solutions that are innovative, cost-effective and scalable.

If you are interested in contacting the authors, or engaging with the Institute for Building Efficiency, please email us at: InstituteforBE@jci.com.

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