GERMANY: SELECTED FINDINGS

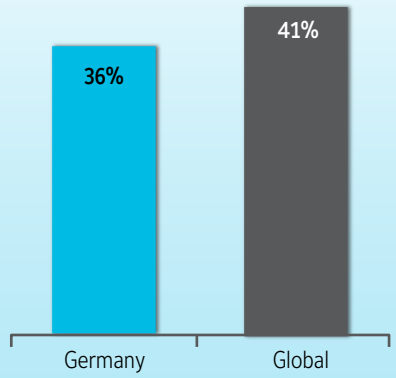
The 2013 Energy Efficiency Indicator (EEI) survey, conducted by the Johnson Controls Institute for Building Efficiency, analyzes the energy efficiency technologies, practices and investments made by over 3,000 executive decision-makers around the world. This year's respondents come from 10 countries and are responsible for a variety of commercial, industrial and institutional (hospital, school, and government) facilities. The study has been conducted annually since 2006. This was the fourth year in which it included Germany, and it drew 301 respondents. The complete analysis of the survey results for France, Germany and the United Kingdom will be announced in September 2013 at an Institute for Building Efficiency Roundtable Dialogue in Brussels, Belgium.

SELECTED FINDINGS RELEASED IN JUNE 2013 INCLUDE:

- 36% of executives indicated that energy management is "extremely important" to their organization or company. This is slightly below the global average of 41%.
- In 2013, fewer respondents than last year indicated they were paying "a lot more attention" to energy efficiency (dropped from 44% in 2012 to 36% in 2013).
- Drivers for action on energy efficiency in Germany included energy cost savings, energy security (reliability, availability and supply of energy), enhanced brand or public image, government and utility incentives and rebates, and customer attraction and retention.
- The leading barriers to efficiency investments cited by German executives were capital availability and uncertainty around the savings or performance of the investments.
- Respondents expected lighting and solar photovoltaic technologies to have the greatest increase in market adoption in Germany in the next 10 years, placing Germany alongside China in expectations for increased local adoption of solar PV technology.

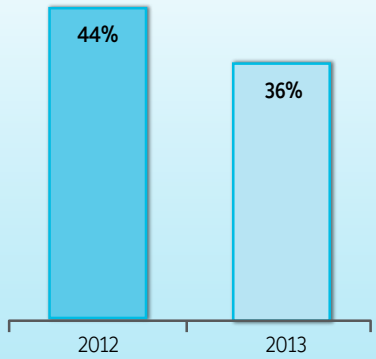
RESULTS: GERMANY

Importance of Energy Management



How important is energy management to your company/organization? (Extremely important)

Attention to Energy Efficiency



Compared to 12 months ago, how much attention is your company/organization paying to energy efficiency now? (Paying a lot more attention)

GERMANY: SELECTED FINDINGS

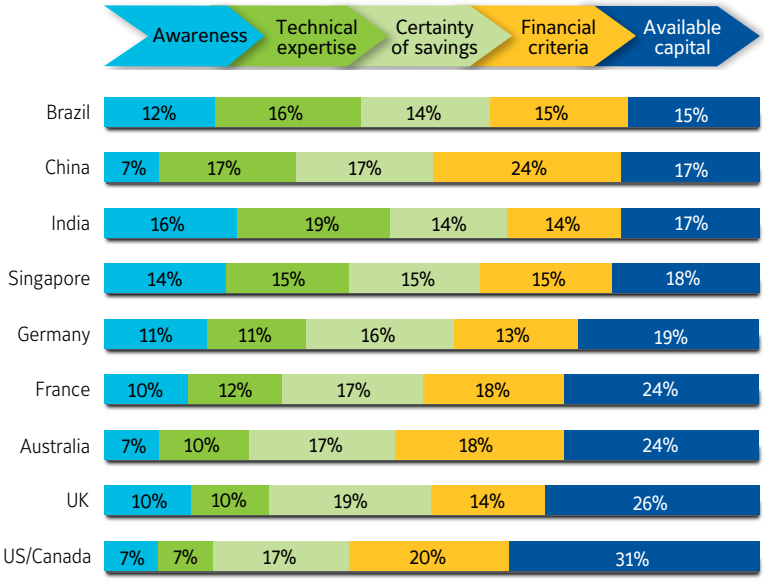
Drivers of efficiency

	US/CAN	UK	Germany	France	Brazil	India	China	Australia	Singapore
Energy cost savings	1	1	1	1	1	1	1	1	1
Government and utility incentives/rebates	2	2	4	2				2	2
Increased asset value	3	5		3				3	
Energy security	5	3	2	5	2	2	2		
Customer attraction and retention			5		3	3	5	4	
Existing government policy							3	5	3
Enhanced brand or public image	4		3	4	5	5	4		5
GHG footprint reduction		4			4				
Enhanced brand or public image						4			4

Which of the following on-site technologies do you expect to have the greatest increase in market adoption over the next ten years?

	US/CAN	UK	Germany	France	Brazil	India	China	Australia	Singapore
Lighting technologies	54%	40%	33%	22%	35%	33%	23%	36%	46%
Smart building technology	34%	24%	27%	22%	26%	32%	37%	31%	35%
Advanced building materials	31%	25%	23%	29%	24%	23%	32%	37%	25%
Solar photovoltaics (PV)	22%	21%	32%	26%	26%	28%	35%	25%	26%
Solar thermal		22%	24%	26%	34%	29%	36%	19%	23%
Electric and plug-in electric vehicles	23%		25%		22%		26%		19%
Advanced cooling technologies	20%		15%		19%	21%			19%
Small wind generators					21%	19%			
Geothermal/ground source heat pumps				27%					

What is the top barrier to pursuing energy efficiency for your organization?



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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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