

CHINA: SELECTED FINDINGS

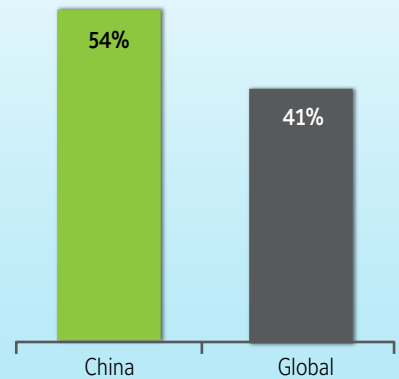
The 2013 Energy Efficiency Indicator (EEI) survey, conducted by the Johnson Controls Institute for Building Efficiency, analyzes the energy efficiency technologies, practices and investments made by over 3,000 executive decision-makers around the world. This year's respondents come from 10 countries and are responsible for a variety of commercial, industrial and institutional (hospital, school, and government) facilities. The survey has been conducted annually since 2006. This was the fourth year in which it included China, and it drew 352 respondents. The complete analysis of the China survey results will be announced Sept. 5-6, 2013, at the International Facility Management Association's World Workplace Asia conference in Shanghai.

SELECTED FINDINGS RELEASED IN JUNE 2013 INCLUDE:

- China continues to lead the world in number of respondents who say that energy management is "extremely important" to their organizations – 54% compared to 41% globally.
- Interest has jumped dramatically in the past year – 61% of Chinese executives stated that they were paying "a lot more attention" to energy efficiency in 2013 compared with last year.
- The top five drivers for energy efficiency action by Chinese executives are: energy cost savings, energy security concerns (availability, reliability, and security of supply), existing government policy, enhanced brand and public image, and customer attraction and retention.
- Executives in China reported that internal financial criteria became a greater issue than in past years: 24% said that projects were unable to meet their organizations' internal financial criteria. In 2011 and 2012 surveys, the market reported greater concern with lack of technical expertise to design and complete energy efficiency projects. This year, technical expertise concerns, lack of certainty in the savings generated by projects, and lack of funding to pursue projects ranked equally as barriers. Lack of awareness of opportunity for energy savings was not perceived as a significant barrier.
- Smart building technology (sensors, smart meters, etc.), solar thermal technologies (hot water, power) and solar photovoltaic technology (electricity) were the top three technologies that executives in China expect to have the greatest increase in market adoption in the next 10 years. China led the world in expectations around the market penetration of solar technologies.

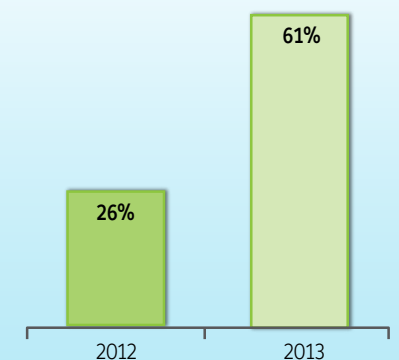
RESULTS: CHINA

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)

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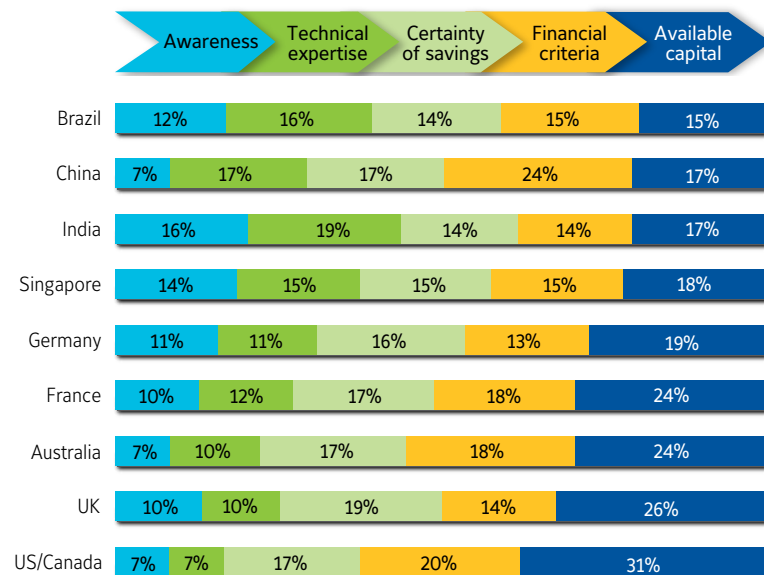
Drivers of efficiency

	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.