

FRANCE: SELECTED FINDINGS

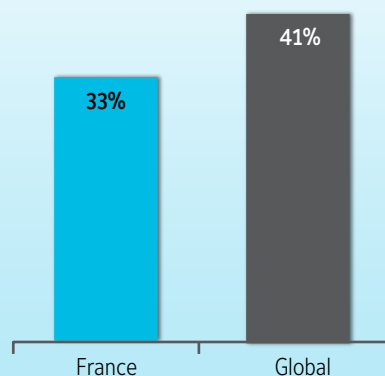
The 2013 Energy Efficiency Indicator (EEI) survey, conducted by the Johnson Controls Institute for Building Efficiency, analyzes the energy efficiency technologies, practices and investments made by over 3,000 executive decision-makers around the world. This year's respondents come from 10 countries 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 France, 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:

- 2013 saw a significant increase in respondents from France who said they were paying "a lot more" attention to energy efficiency.
- 33% of respondents said energy management was "extremely important" to their organizations. This remains below the global average (41% 2012 and 43% in 2013) but has increased from 28% since 2012.
- French respondents reported the key drivers of energy efficiency investment and action as energy cost savings, government and utility incentives and rebates, increased real estate asset value, enhanced brand or public image, and energy security (reliability, availability and supply of energy). France is one of three countries (with the U.S. and Australia) that now see improved asset value as one of the top three drivers for energy efficiency. Last year energy security and decreasing greenhouse gas emissions footprints ranked as more important, but fewer French respondents cited these as their priority concerns in 2013.
- Capital availability was the leading barrier to efficiency investments for 24% of French executives in 2013. Other top barriers included internal financial criteria such as payback requirements, and uncertainty about the savings or performance of energy efficiency investments.
- Advanced building materials and solar technologies (thermal and solar photovoltaic) were expected to have the greatest increase in market adoption in France in the next 10 years. France had the lowest expectations of increased market adoption of advanced lighting technologies (22%) among countries in the 2013 survey.

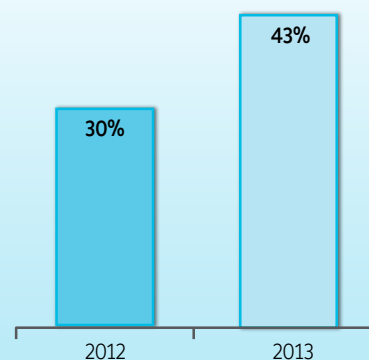
RESULTS: FRANCE

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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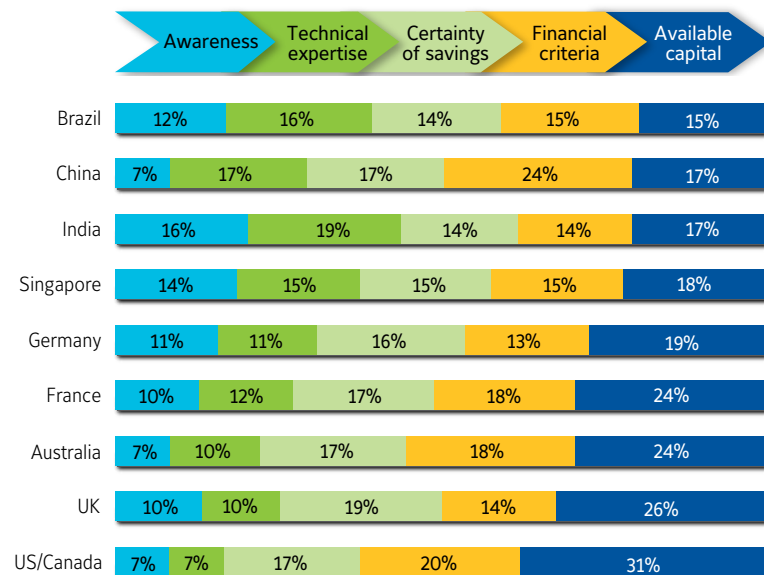
Drivers of efficiency

	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.