

INDIA: SELECTED FINDINGS

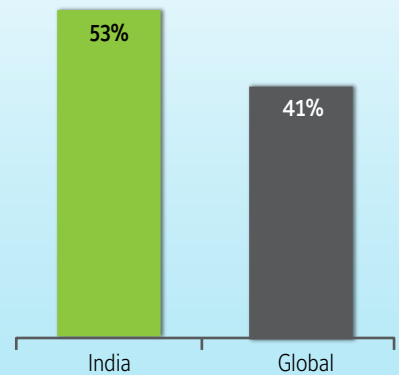
The 2013 Energy Efficiency Indicator (EEI) survey, conducted by the Johnson Controls Institute for Building Efficiency, analyzes the energy efficiency technologies, practices and investments made by more than 3,000 executive decision-makers around the world. This year's respondents come from 10 countries 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 is the fourth year in which it included India, and it drew 381 respondents. The full results will be released September 5-6 at World Workplace Asia 2013 in Shanghai.

SELECTED FINDINGS RELEASED IN JUNE 2013 INCLUDE:

- Executives who said they are paying "a lot more attention" to energy efficiency remained consistent in India from 2012 to 2013 at 59%.
- More executives in India saw energy management as "extremely important" to their organizations (53%) compared with respondents globally (41%).
- The top five drivers of energy efficiency action in India were energy cost savings, energy security (availability, reliability, and security of supply), customer attraction and retention, attracting and retaining employees, and enhanced brand or public image.
- Barriers to energy efficiency action were fairly evenly split across five categories; lack of technical expertise ranked as the top barrier.
- India executives reported that they expect advanced lighting technologies and smart building technologies to achieve the greatest increase in market adoption in the next 10 years, followed by solar thermal and solar photovoltaics.

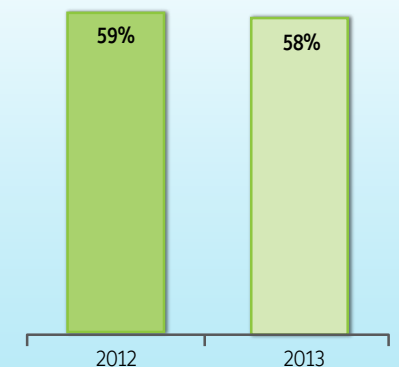
RESULTS: INDIA

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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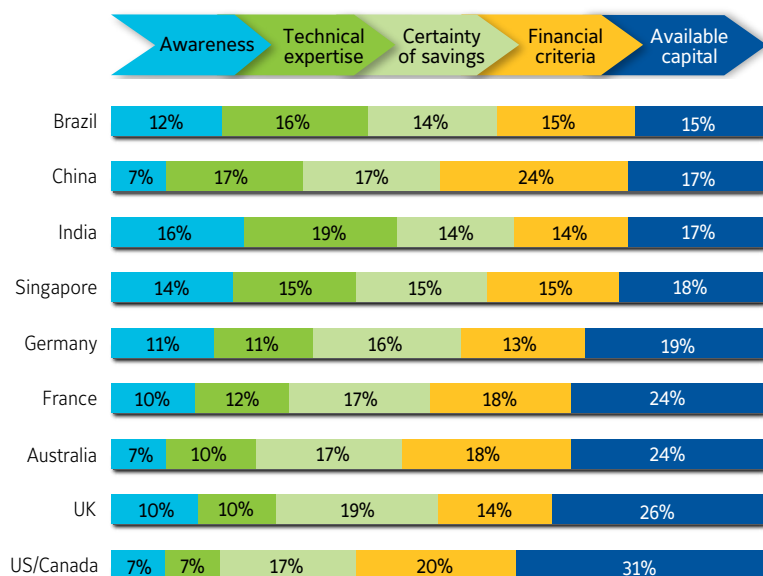
Drivers of efficiency

	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?



institute
for **building
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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.