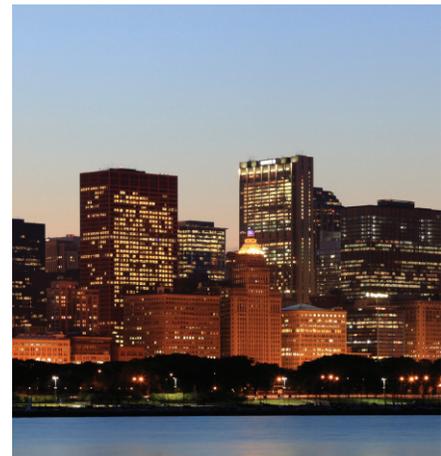


2012 ENERGY EFFICIENCY INDICATOR SURVEY: INDIA RESULTS

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 2012, nearly 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 India, where there were 396 respondents this year. The complete EEI survey results can be found at www.InstituteBE.com.

FINDINGS FROM THE 2012 INDIA EEI SURVEY RESPONSES:

- There was strong interest in energy efficiency among India's building executives: 95% said energy management was very or extremely important to their organizations, and 86% said they were paying more attention to energy in 2012 than in 2011.
- India and China led the global average in plans to increase investment: In India, 74% of respondents planned to increase spending in the next 12 months (Figure 1). Sixty-one percent of Indian respondents had invested in energy efficiency in the past year, and 43% had invested in renewable energy.
- Energy cost savings, enhanced brand or public image and increasing energy security led as drivers for energy efficiency action.
- One approach to demonstrating interest in enhanced brand or public image may be the pursuit of green buildings. In India, 73% of respondents indicated they had at least one certified green building. Fifty-six percent planned to pursue green certification in new buildings, and 54% percent in existing buildings.
- Indian respondents were particularly interested in finding ways in which a building's green attributes could be reflected in the market. When asked which energy policy would have the greatest impact on improving energy efficiency in buildings, 21% said the adoption of green appraisal standards that value efficiency improvements would be a top priority, along with low-interest financing for energy upgrades, and stricter building codes and equipment standards.
- India's top three energy efficiency measures adopted in the past 12 months were lighting improvements (68%), water efficiency improvements (61%), and HVAC and/or controls improvements (61%).



OVERVIEW

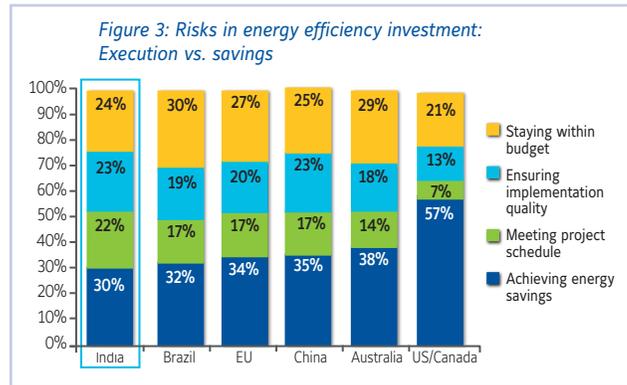
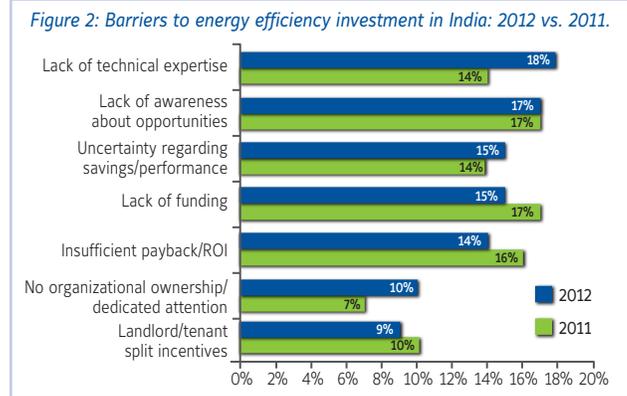
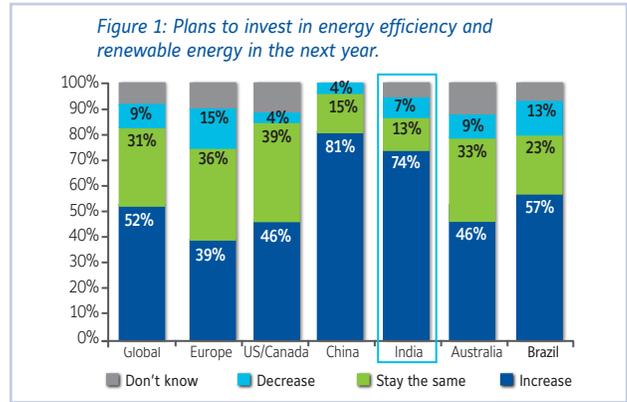
The 2012 Global Energy Efficiency Indicator (EEI) survey reveals the energy priorities, practices, investment plans and barriers facing building decision-makers responsible for energy investments and activities in their companies. The global survey included nearly 3,500 facility managers and building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

- When asked which on-site technologies they expected to see the greatest market adoption in the next 10 years, executives selected lighting technologies (35%), solar thermal (29%), and solar PV (26%) as their top three choices.
- The top barrier to pursuing energy efficiency in India was a lack of technical expertise to evaluate or execute projects (up from 2011), followed by a lack of awareness about opportunities (Figure 2).
- Respondents in India saw project execution – including staying within budget, ensuring implementation quality and meeting project schedule – as the greatest risk when considering energy efficiency or renewable energy projects – more so than any other region (Figure 3).
- The top three energy management practices already adopted in Indian respondents' facilities were tracking and analyzing data (53%), measuring and verifying energy project savings (49%), and defining and communicating an energy policy (48%).

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 Indian respondents, 62% classified their facilities as commercial, 13% as institutional (government buildings, hospitals and schools), and 25% as industrial. Forty-four 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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