

India Energy Efficiency Indicator Survey

2009 Findings



June 9, 2009

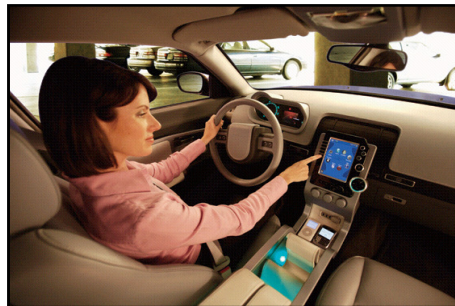


Today's Agenda

- Introductions
- An Overview of the Energy Efficiency Indicator
- Key Findings from 2009
- Perspectives on energy efficiency:
K. Raheja
Carbon Minus India
- Question & Answer

About Johnson Controls

- We create smart environments that are safe, comfortable and sustainable
- 124-year-old global, multi-industrial company
- 3 Divisions: Building Efficiency, Automotive Experience & Power Solutions



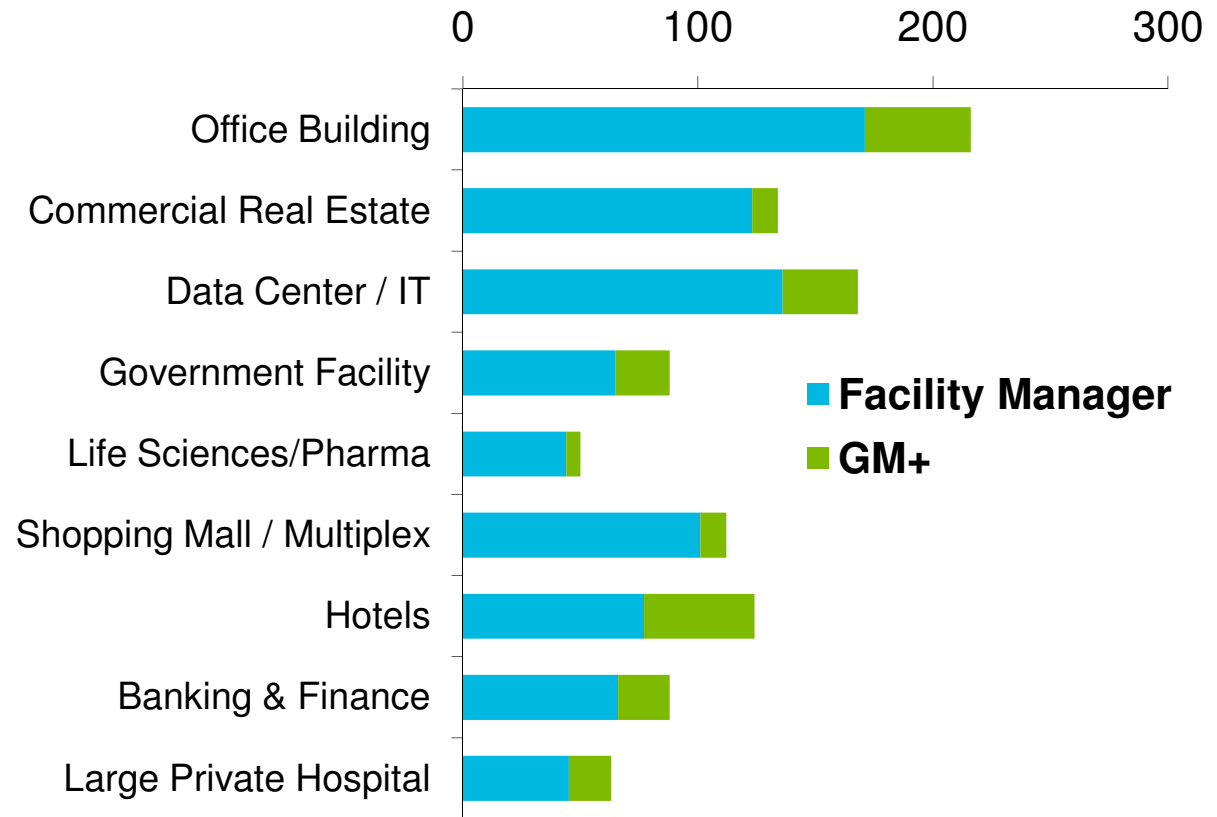
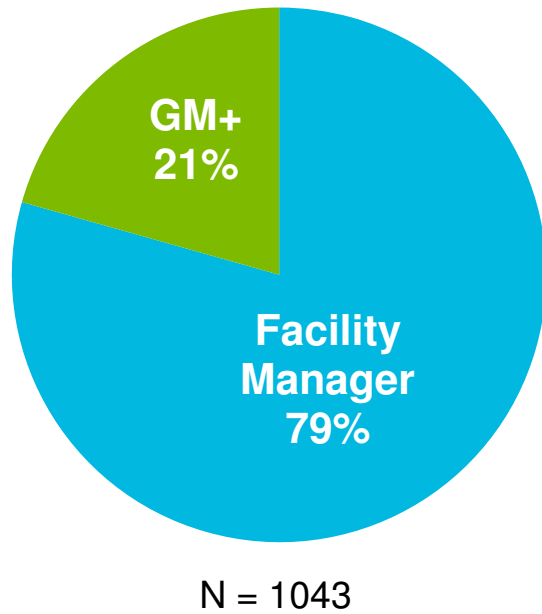
Key Questions in the EEI Survey

- What are the attitudes, priorities and concerns of the people at the front lines of energy management and energy efficiency?
- What types of investments are they making?
- What financial criteria do they use?
- What trends are emerging?

INDIA EEI KEY FINDINGS

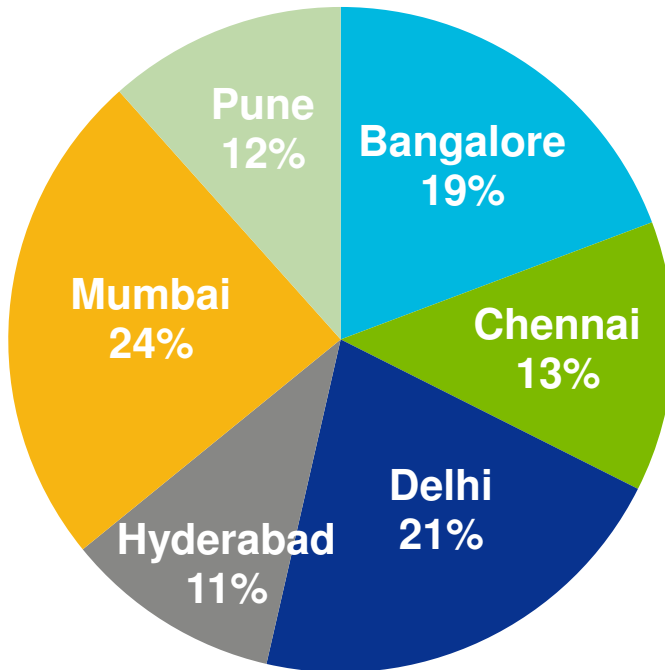
Who we surveyed

Respondents by Designation, Industry



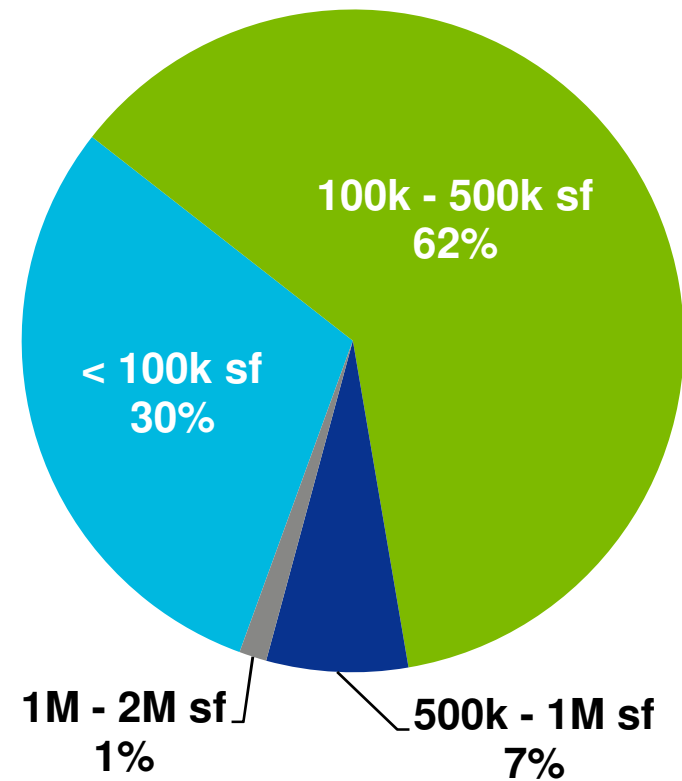
Who we surveyed

By Geography



By Facility(ies) Area

N = 1043



Efficiency has never been more important

47%...

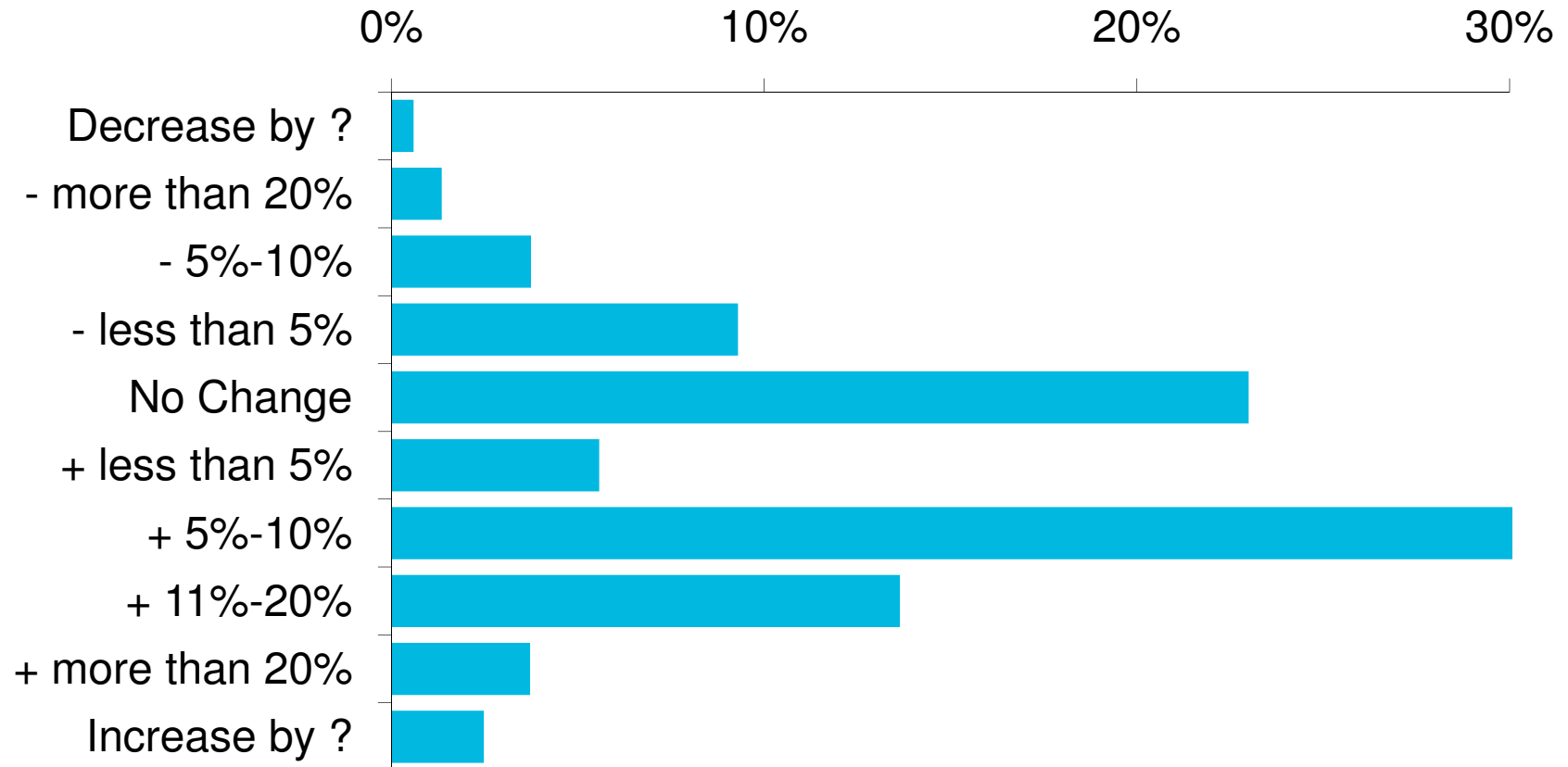
Paying more attention to energy efficiency than last year

94%...

Say energy management is extremely or very important to their company

Uncertainty about energy prices

Do you believe the combined price of the energy that your facilities use will. . .



Top efficiency measures reported

89% switched to energy efficient lighting

75% educated facilities operations staff

63% adjusted HVAC temperature controls

60% installed variable speed/frequency drives

Significant investment planned

64%...

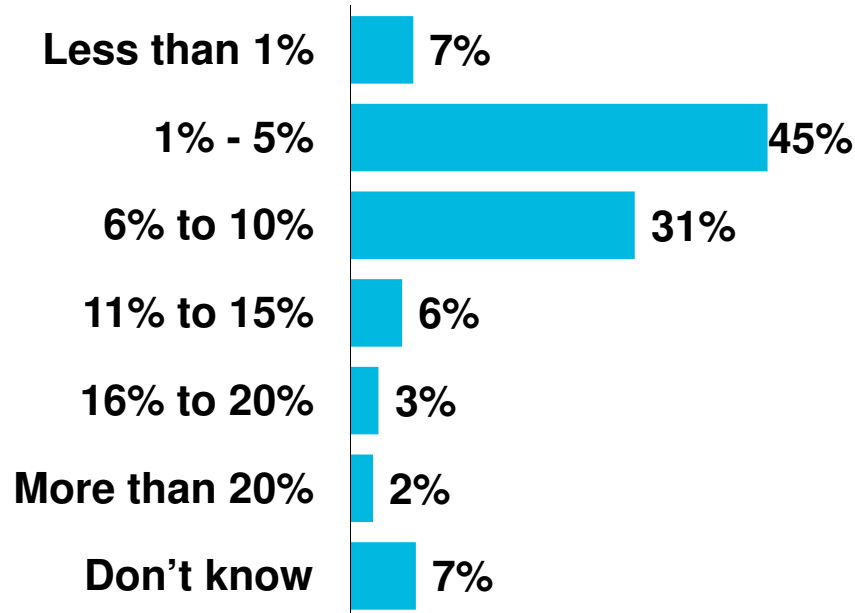
expect their organizations to make capital improvements in energy efficiency

72%...

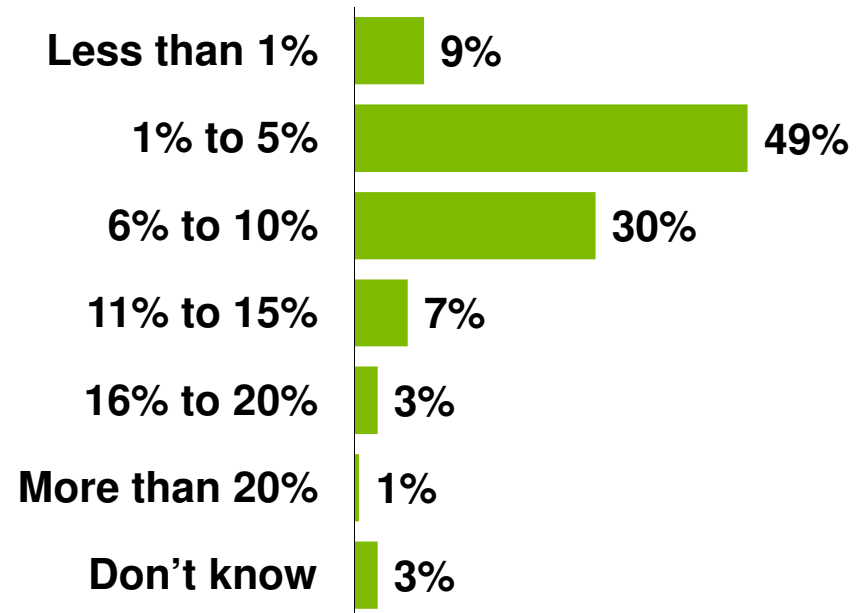
expect their organizations to make improvements in energy efficiency out of operating budgets

Significant investment planned

% of Capital Budget Allocated for Energy Efficiency Improvements



% of Operating Budget Allocated for Energy Efficiency Improvements



Green buildings & renewables

17% seeking green building certification for new construction projects, **0%** seeking certification for retrofit projects

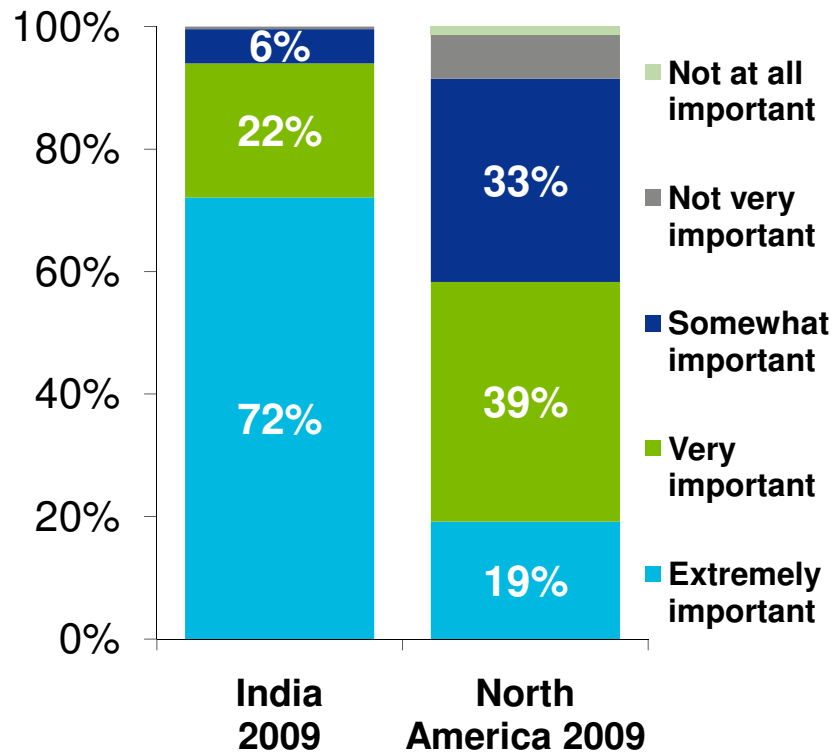
More than **92%** say energy efficiency is a priority in new construction and in retrofits

14% considering solar electric, **22%** considering solar thermal technologies for new construction

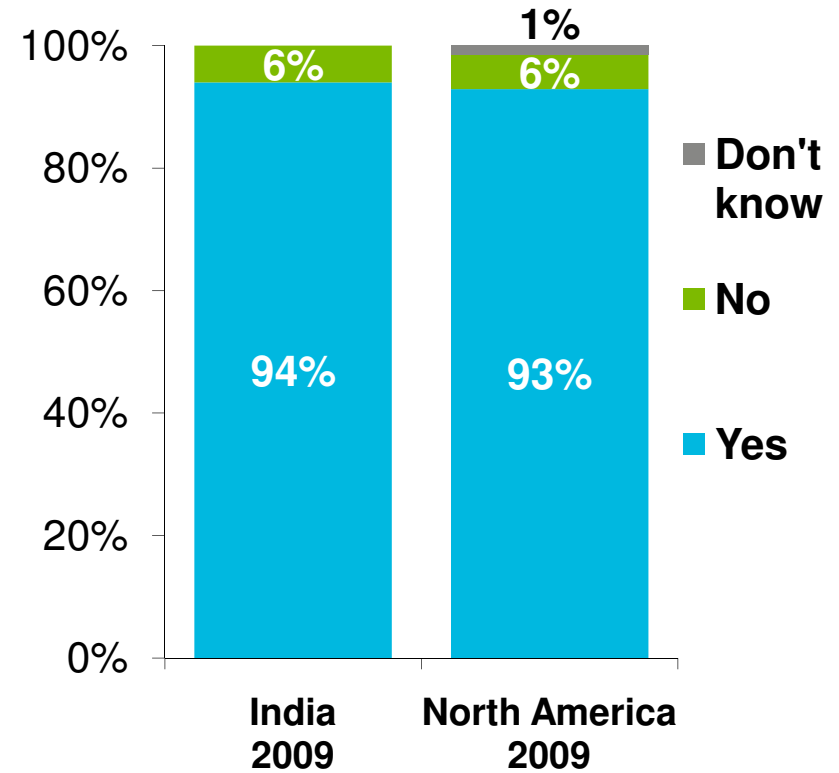
RESULTS COMPARISON INDIA vs NORTH AMERICA

Importance of energy efficiency

How important is energy management to your company/organization?

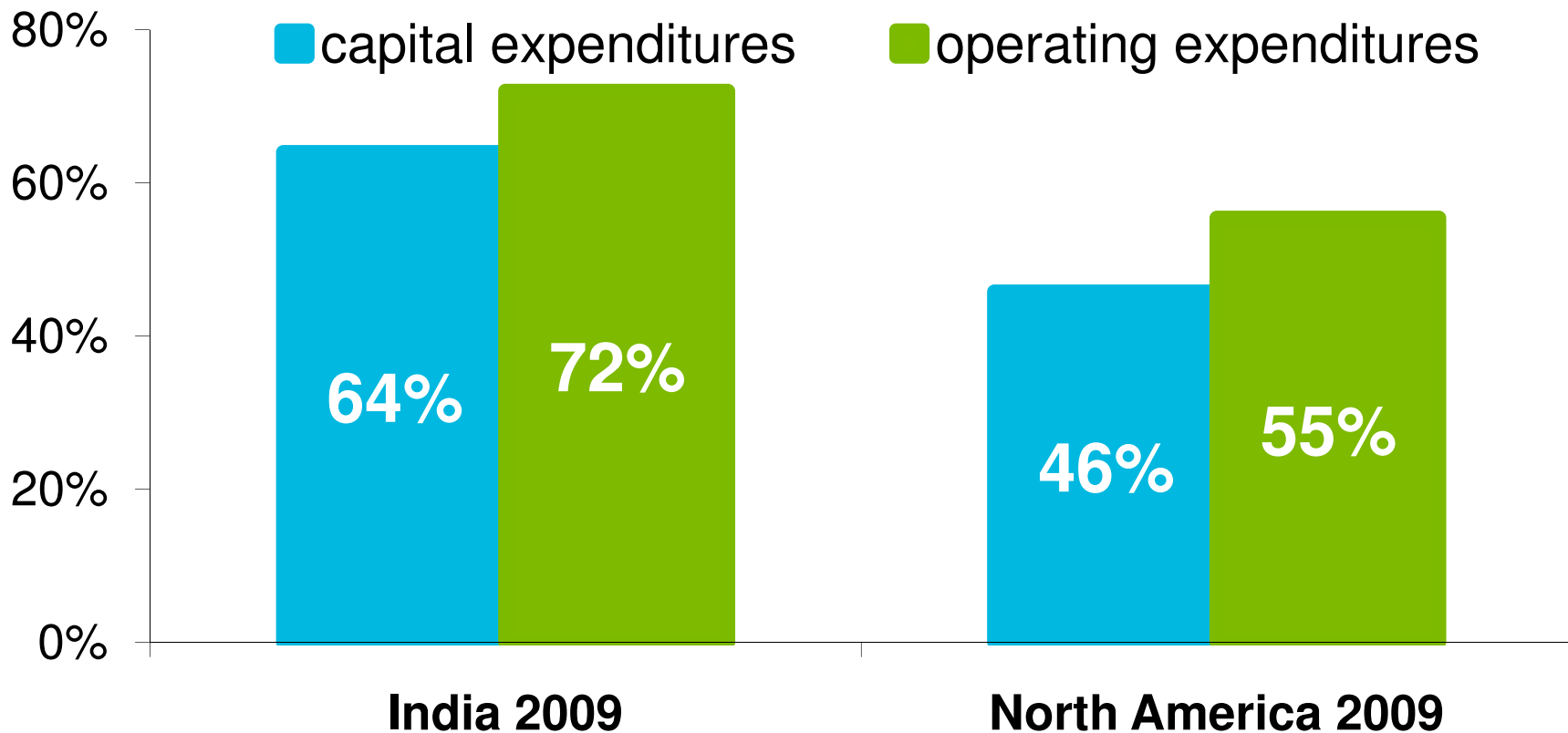


Is energy efficiency a priority in your current or planned construction or retrofit projects?



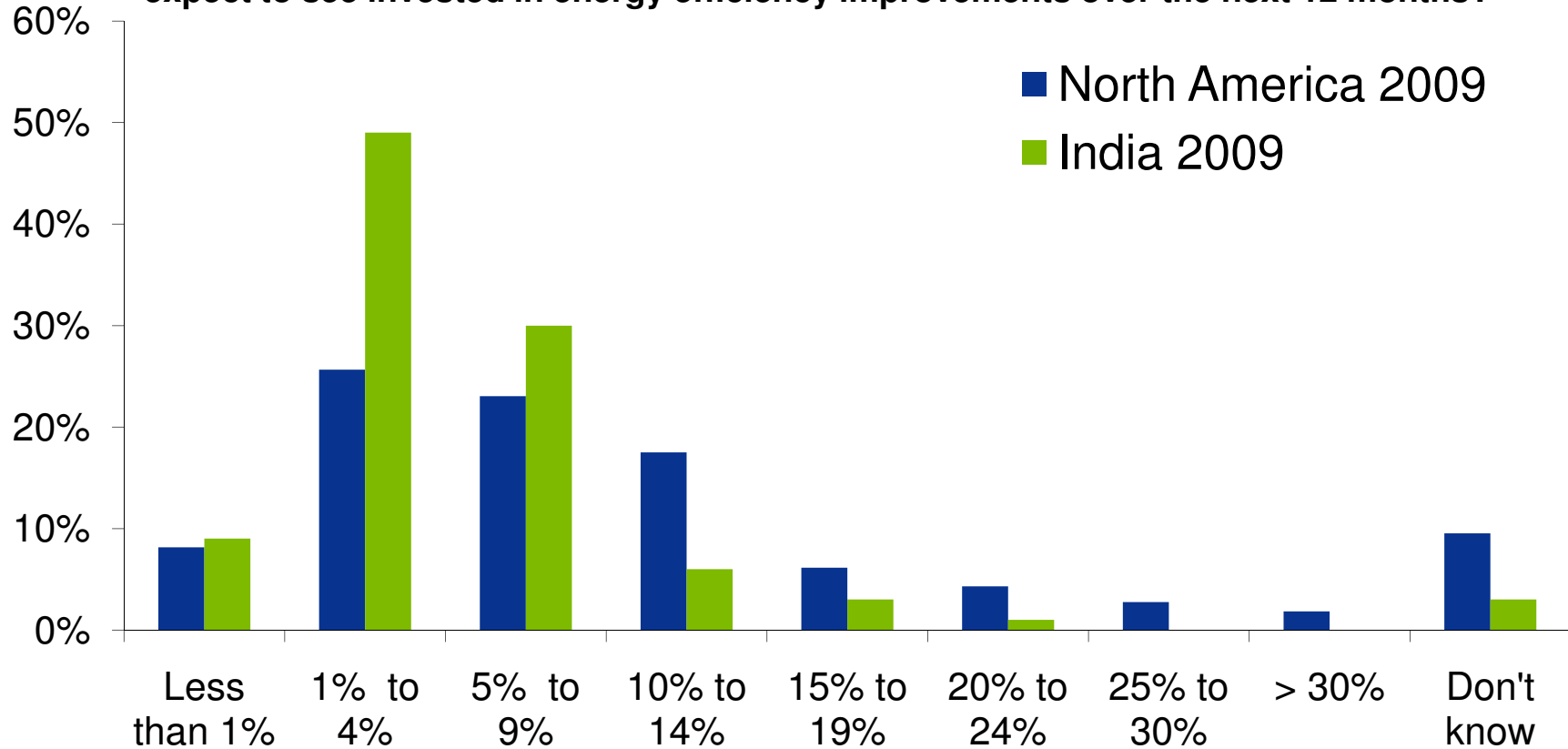
EE investment more likely in India

Fraction planning to make energy efficiency investments over the next 12 months with....



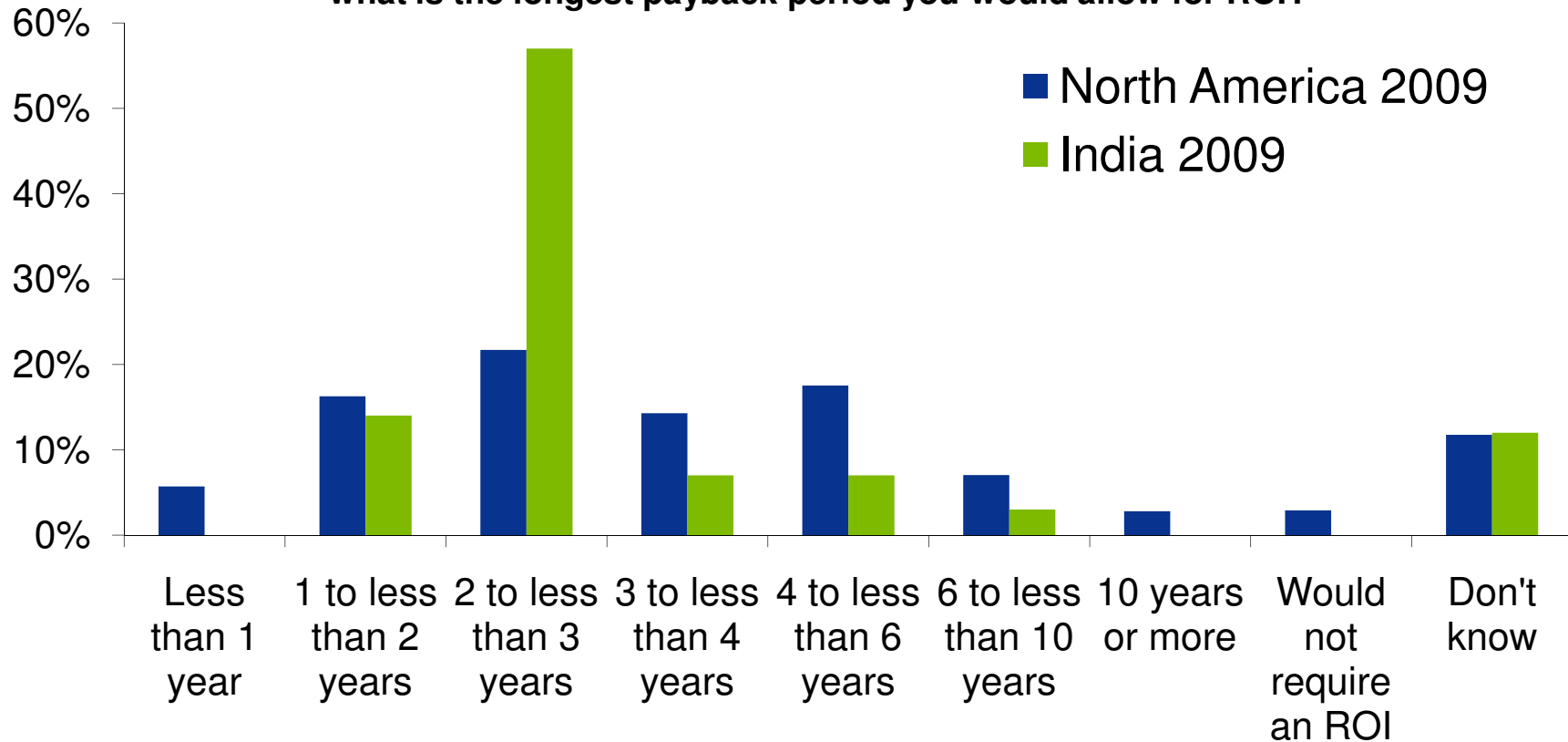
...but with smaller fraction of budgets

What percentage of your company's/organization's facilities-related capital budget do you expect to see invested in energy efficiency improvements over the next 12 months?



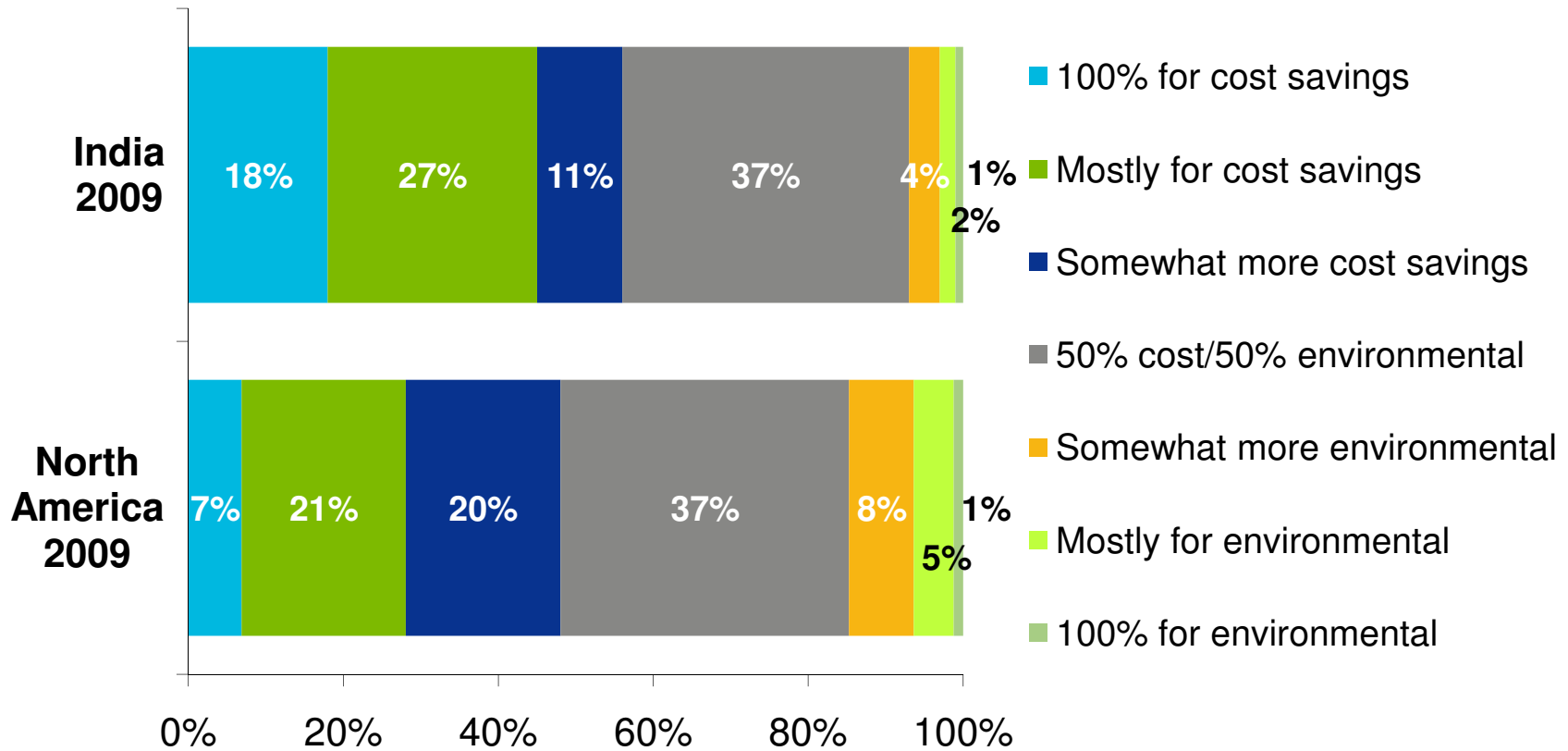
More variation in hurdle rates in NA

If your company/organization were to make a significant investment in energy efficiency, what is the longest payback period you would allow for ROI?



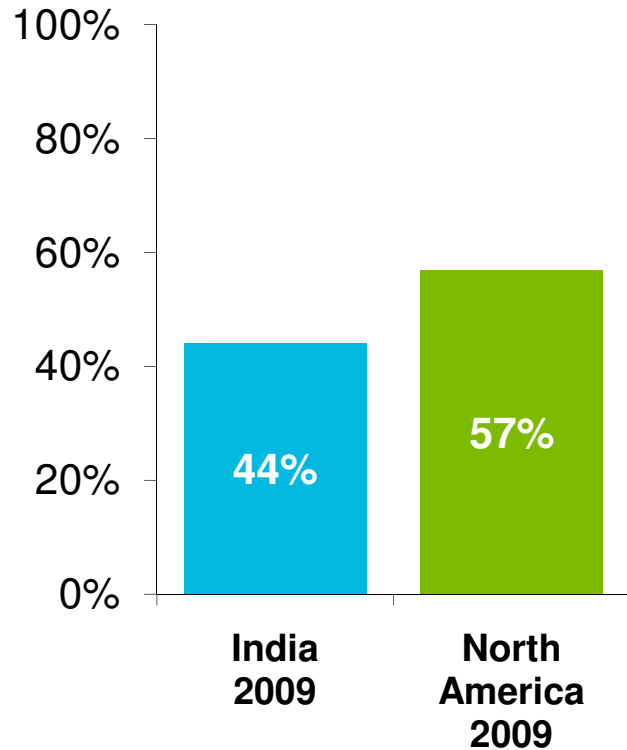
Cost the greater motivator in India

Relative influence of cost savings vs. environmental responsibility

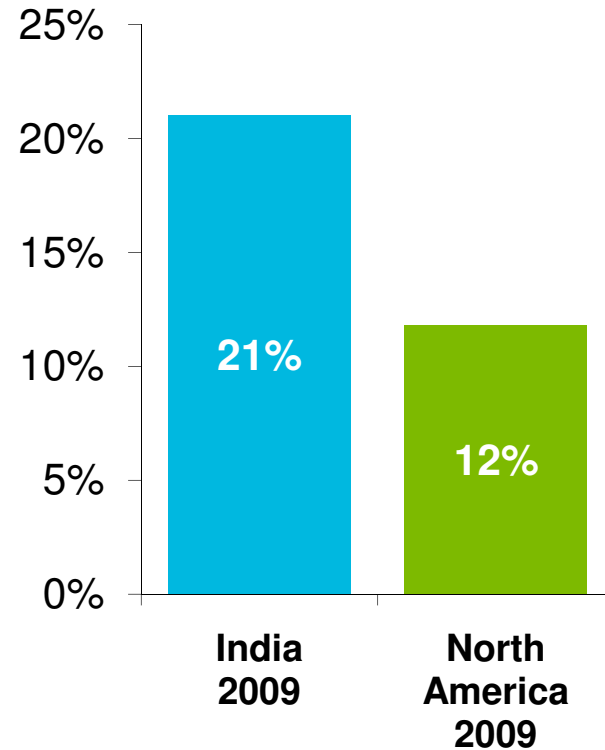


Climate change also a driver

% that consider climate change somewhat, very, or extremely significant in company's energy efficiency decisions

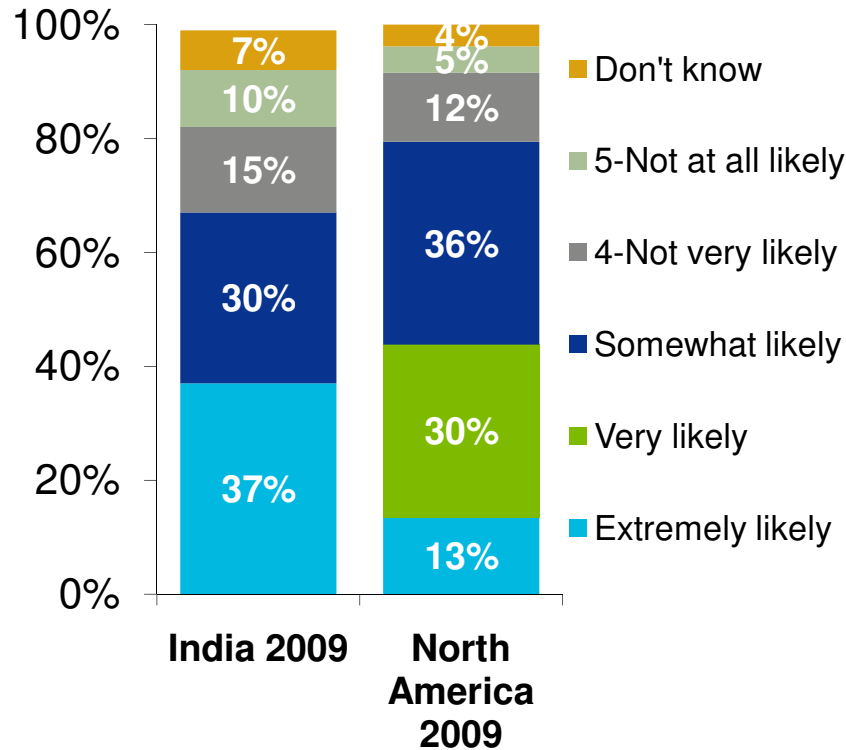


% of companies that have a publicly stated carbon-reduction goal

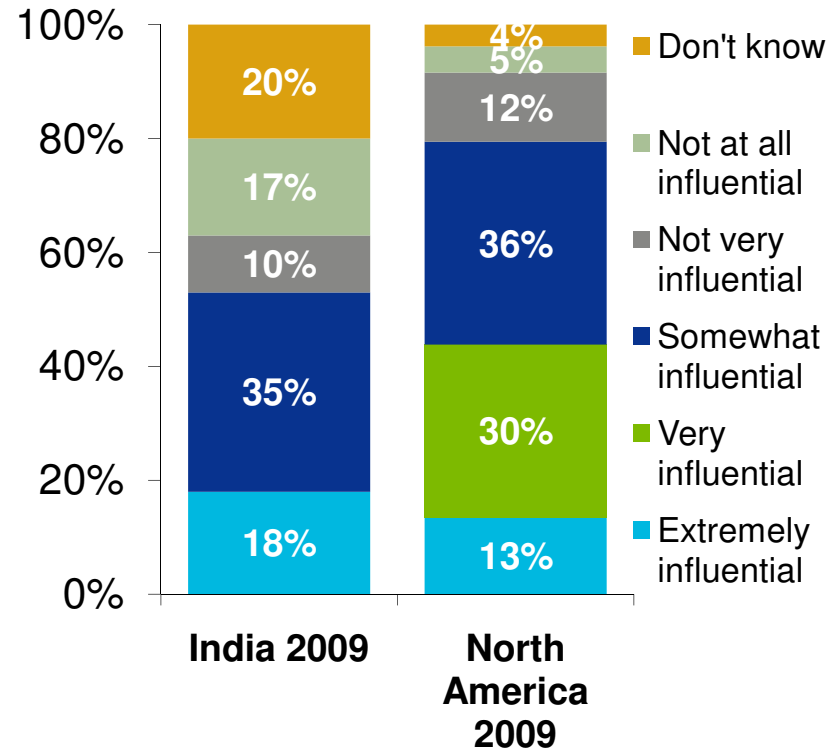


Both expecting legislation

How likely is significant legislation mandating energy efficiency and/or carbon reduction within the next 2 years?

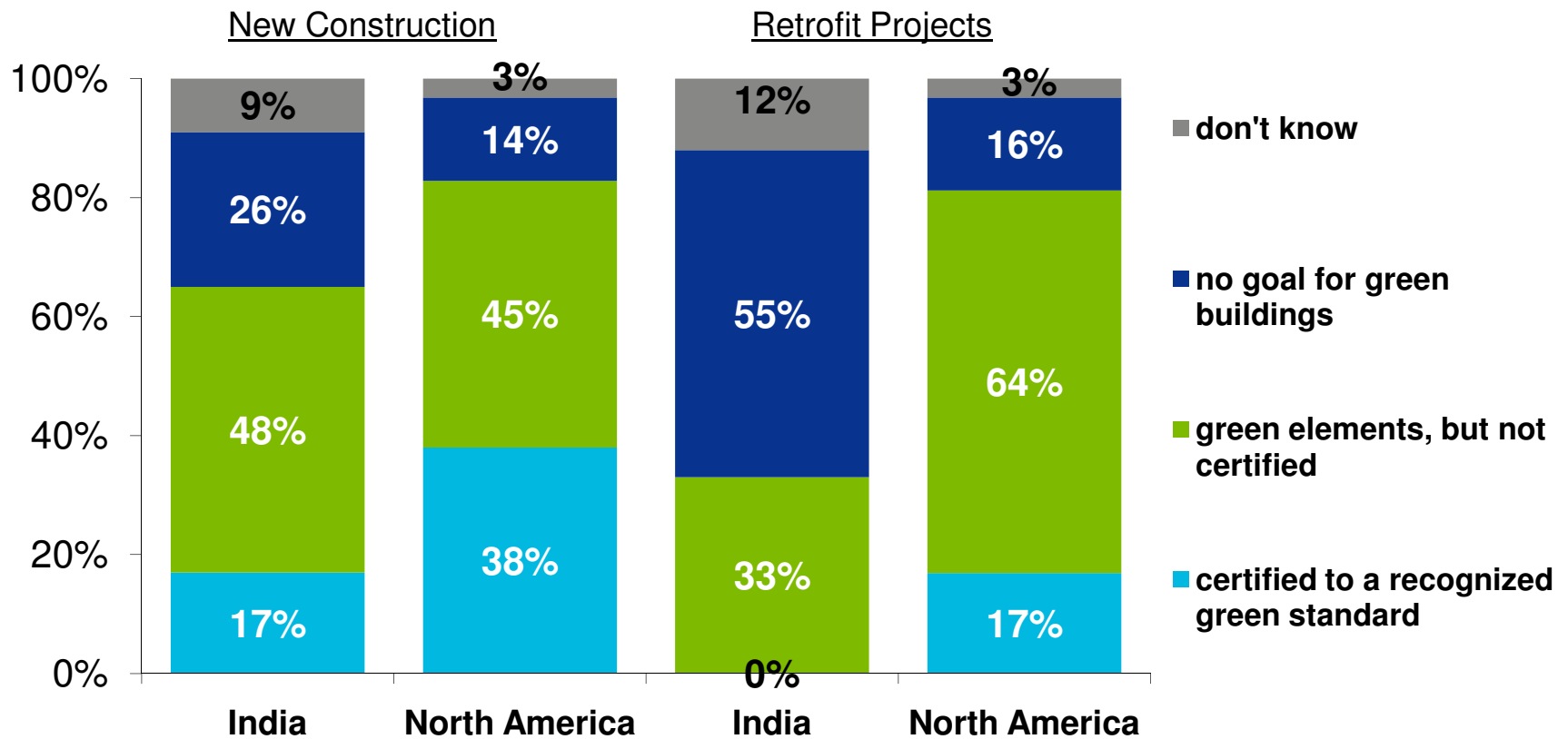


How influential are incentives offered by utilities or governments in your company's energy efficiency decisions?



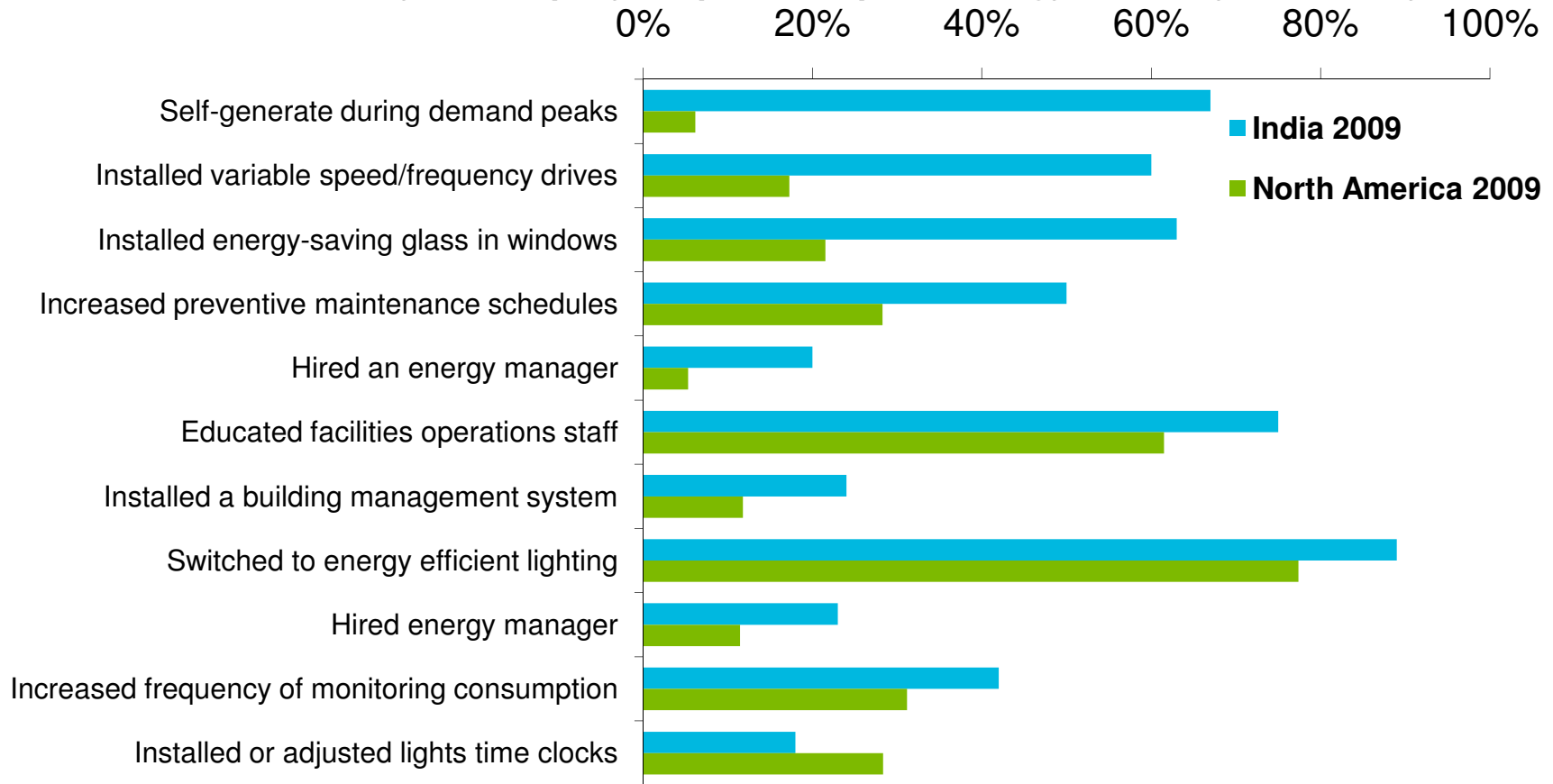
Higher green building goals in US

What are your goals with respect to green buildings?



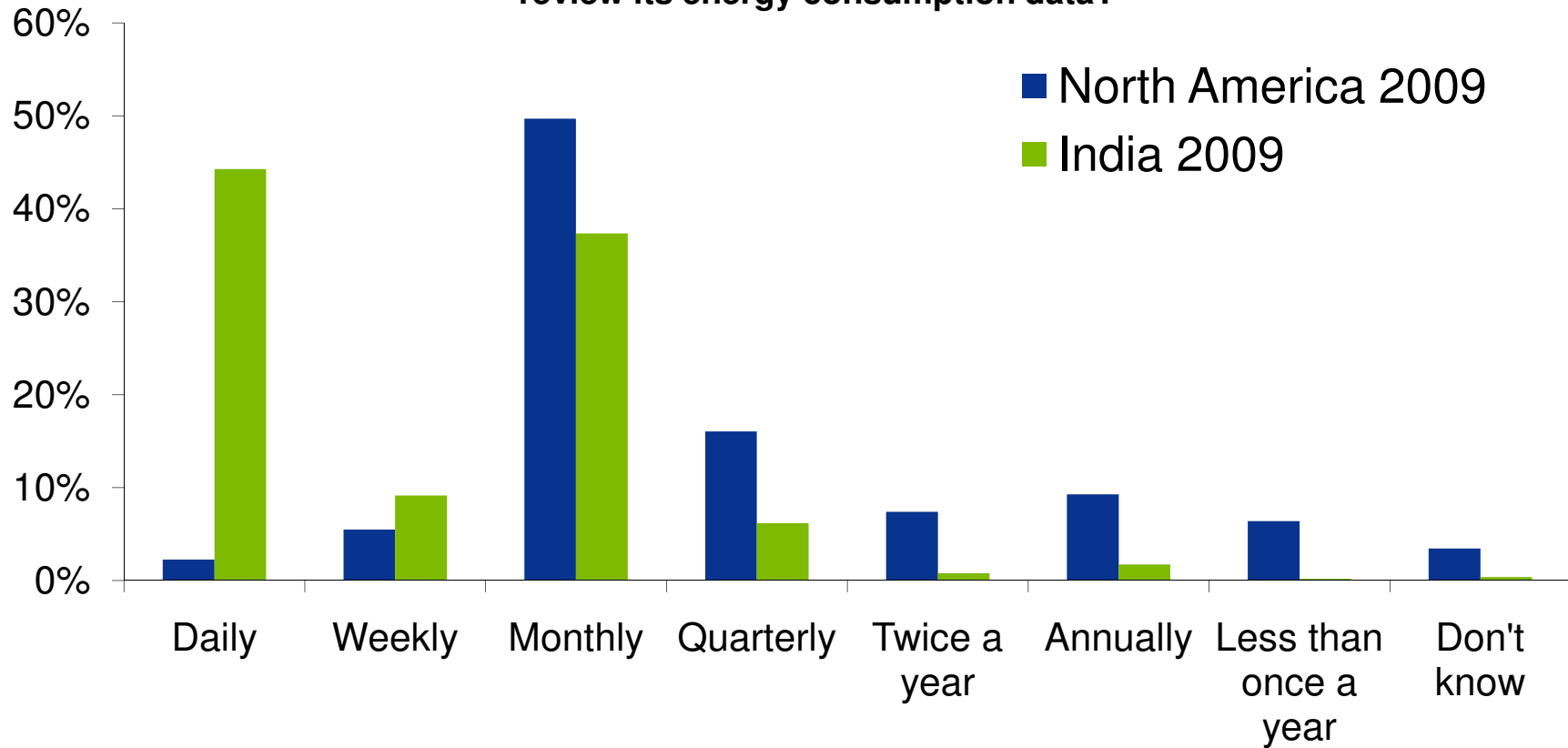
Measures with different adoption levels

Which measures has your company adopted to improve energy efficiency in the last year?



More frequent monitoring in India

On average, how frequently does your company/organization review its energy consumption data?



Observations & Conclusions

- **High interest in energy efficiency**
Becoming more visible and important across industries and management levels in India
- **Significant investment planned**
Commitment to invest in energy efficiency higher in India than in the US
- **Demand for efficiency will grow**
Regulation and aligning incentives will drive significant investment in energy efficiency

For More Complete EEI Results

Go to johnsoncontrols.com → media → press kits → BE

The screenshot shows a web browser window with the address bar displaying <http://www.johnsoncontrols.com/publish/us/en/news.html>. The page features the Johnson Controls logo in the top left corner. A navigation menu at the top includes links for Home, Media, Careers, Investors, Locations, and Contact Us. Below this, there are links for About Us, Products & Solutions, and Technology. A search bar and a Login button are located in the top right corner. The main content area is titled "Media Center Home > Press Kits" and "Press Kits". It contains a paragraph explaining that the section provides online press kits organized by business unit, with links to news releases, images, and other downloads. Below this, there are links for Automotive Experience, Building Efficiency, Power Solutions, and 2009 North American International Auto Show. At the bottom of the main content area, there are links for Email Page and Print. On the left side, there is a "Media Center" sidebar with a list of links: Media Center Home, News Releases, Multimedia Gallery, Information/Resources, News Alerts, In the News, Press Kits (highlighted), and Search. On the right side, there is a "LATEST NEWS" section with three news items, each with a date and a headline. The first item is dated May 04, 2009 and is titled "Johnson Controls Named Top Supporter of Historically Black Colleges and Universities". The second item is dated May 01, 2009 and is titled "Energy Efficiency Indicator Identifies Business Strategies for Energy Efficiency Despite Turbulent Economy". The third item is dated May 01, 2009 and is titled "SOUTH AFRICA'S LARGEST PHARMACEUTICAL COMPANY TO BOOST SECURITY AND OPTIMIZE ENERGY".

Q & A

Efficiency Now: It's Never Been More Important



India Energy Efficiency Indicator

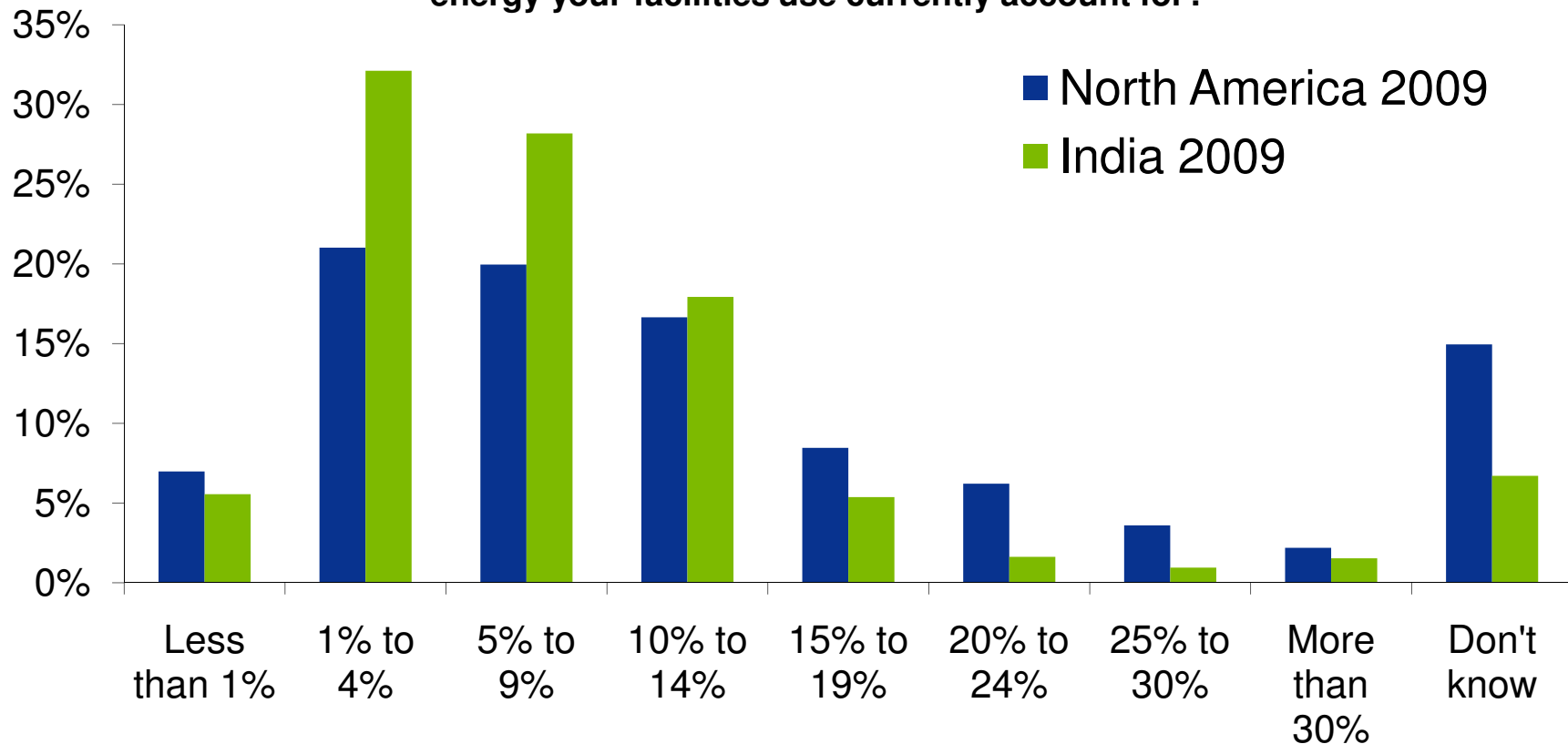
2009 Findings



APPENDIX: ADDITIONAL FINDINGS

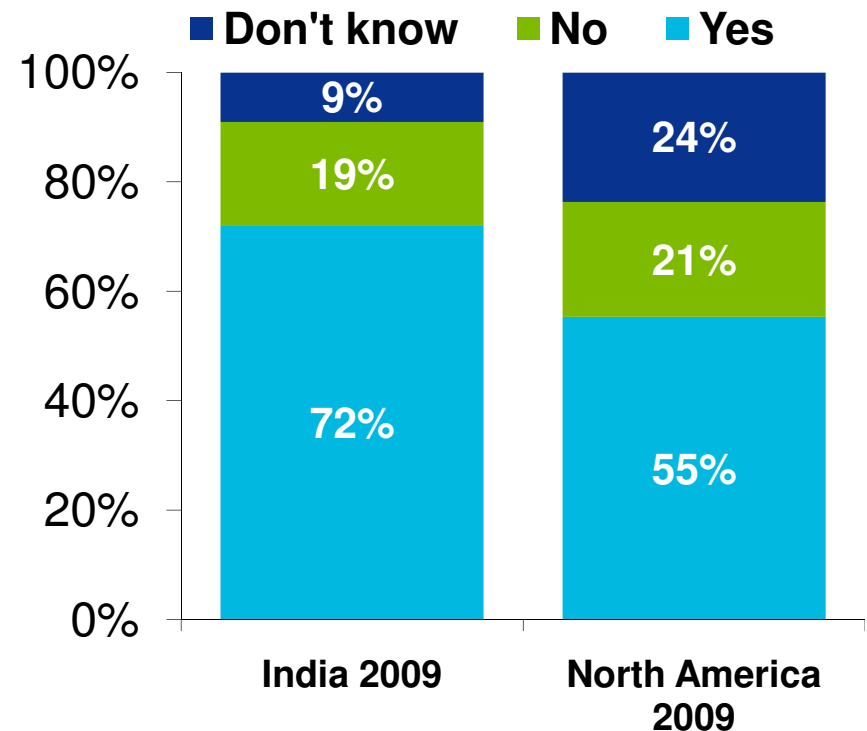
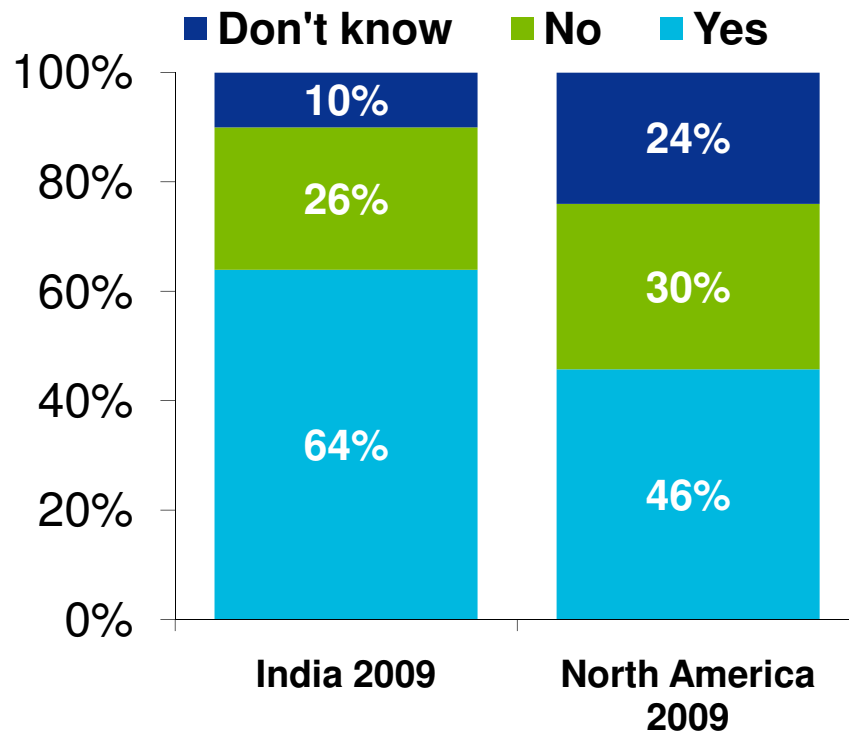
Energy smaller share of cost in India

On average, what percentage of your company's/organization's total expenses does the energy your facilities use currently account for?



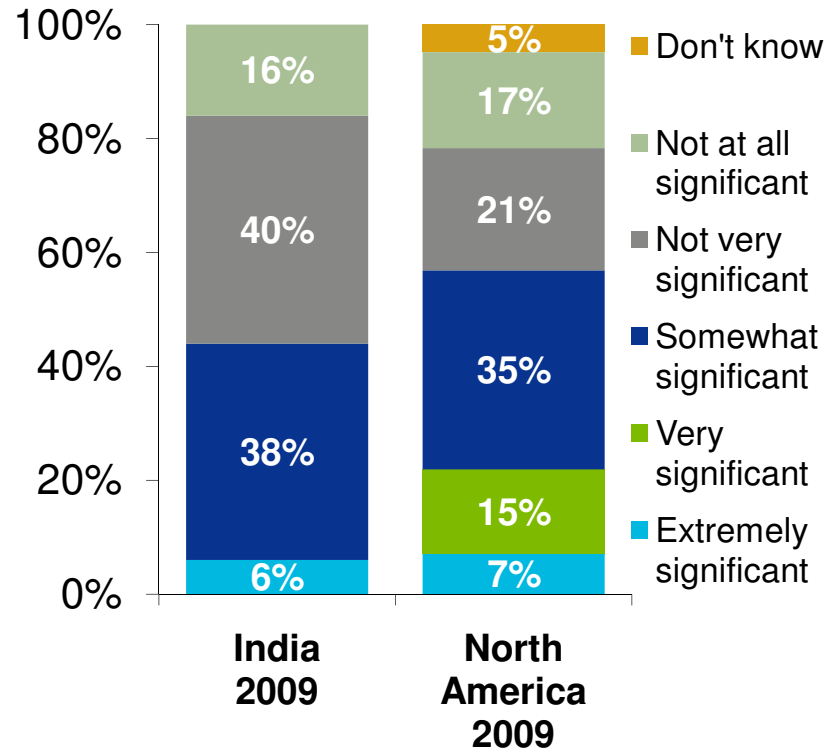
India outpaces U.S. in EE investment

Do you expect to make energy efficiency improvements over the next 12 months...
with capital expenditures? with operating expenditures?

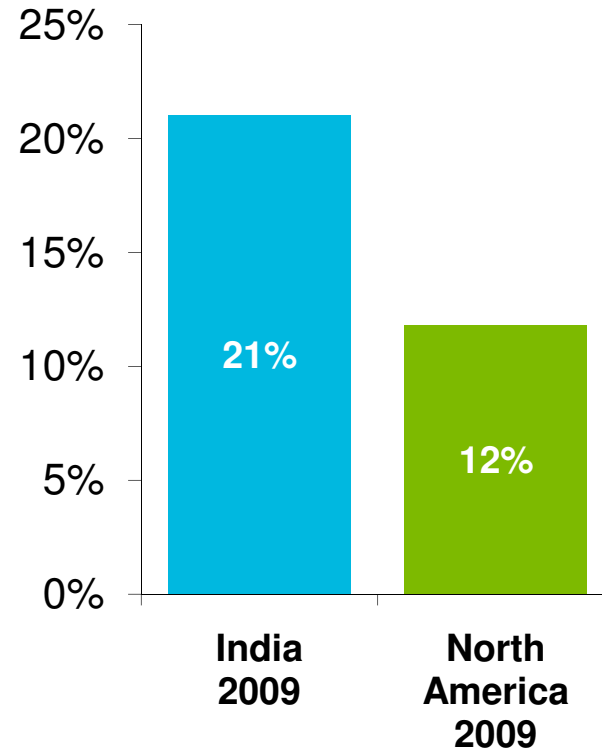


Climate change a driver for both

How significant an influence is climate change in your company's energy efficiency decisions?



Does your company/organization have a publicly stated carbon-reduction goal?



Building green to attract talent

How important do you believe green buildings will be in attracting and retaining current and future employees?

