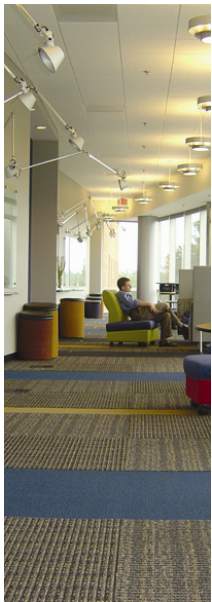


2010 India EEI Results

Findings Summary





Respondent Profile

Energy Efficiency Indicator 2010 India Results

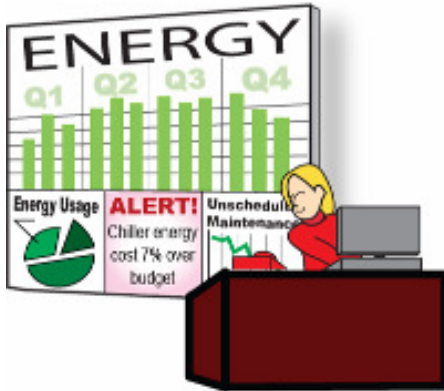
Energy Efficiency Indicator – India 2010
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Who we surveyed: 2 qualifying criteria



1. Must have capital or operations budget responsibility for their organization's facilities.



2. Job responsibilities must include reviewing or monitoring energy usage, and/or

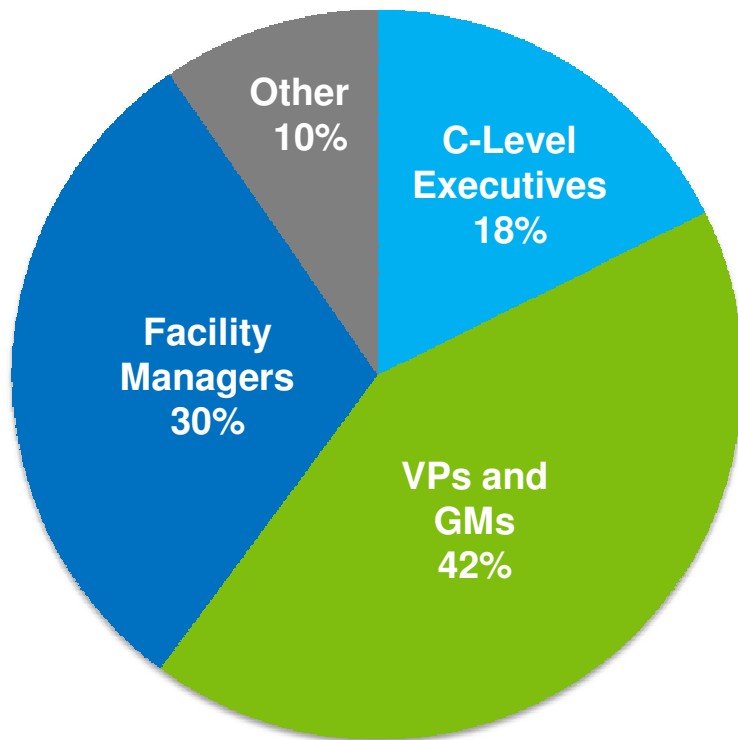
proposing or approving initiatives to make organization's facilities more efficient.



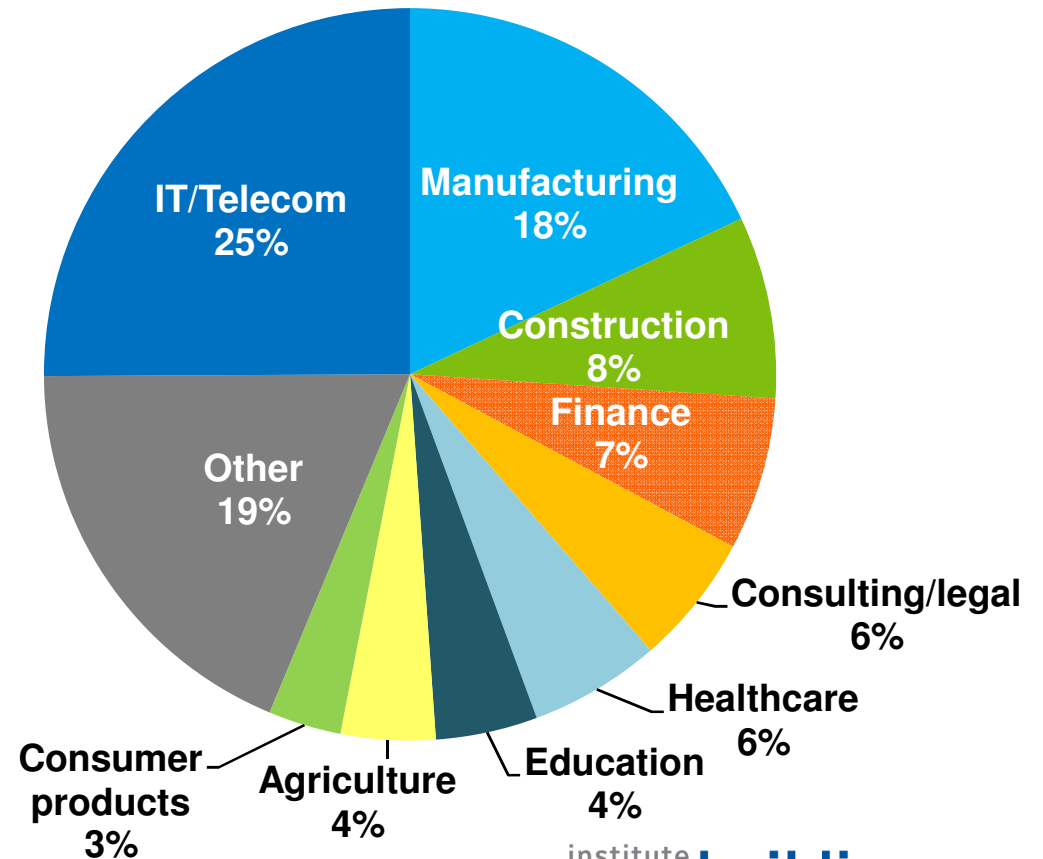
Who we surveyed

311 total respondents in India

By Role



By Industry Sector

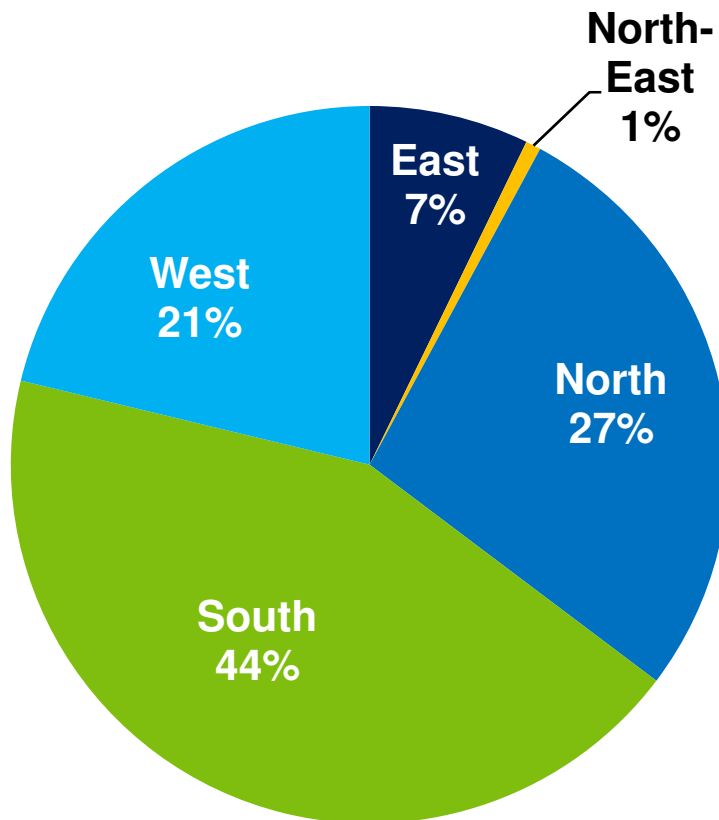




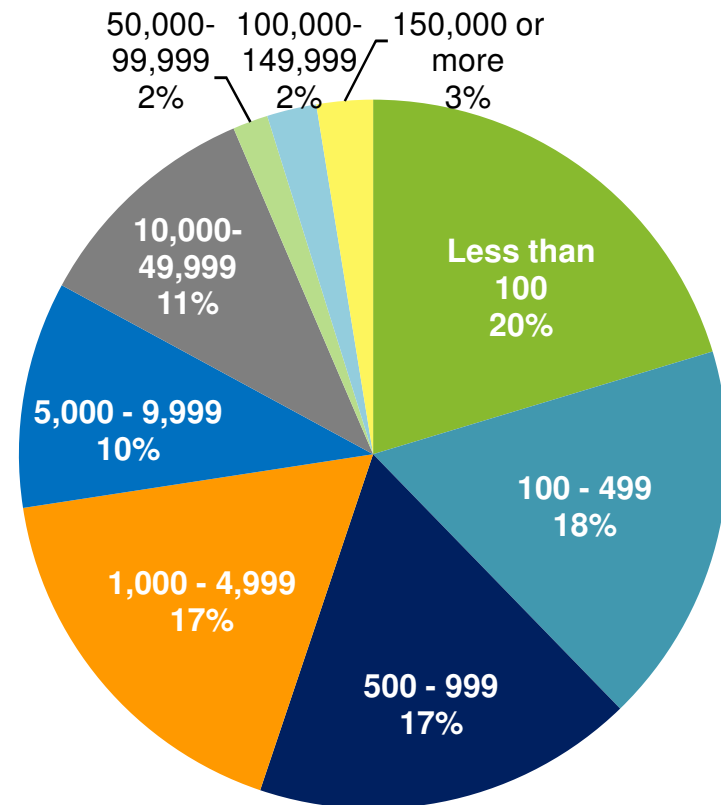
Who we surveyed

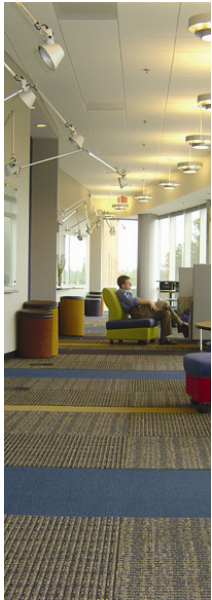
311 total respondents in India

By Region



By Size – Number of Employees





Priorities and Concerns

Energy Efficiency Indicator 2010 India Results

Energy Efficiency Indicator – India 2010
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Energy efficiency remains a strong business priority in India

85%...

are paying more attention to energy efficiency than last year

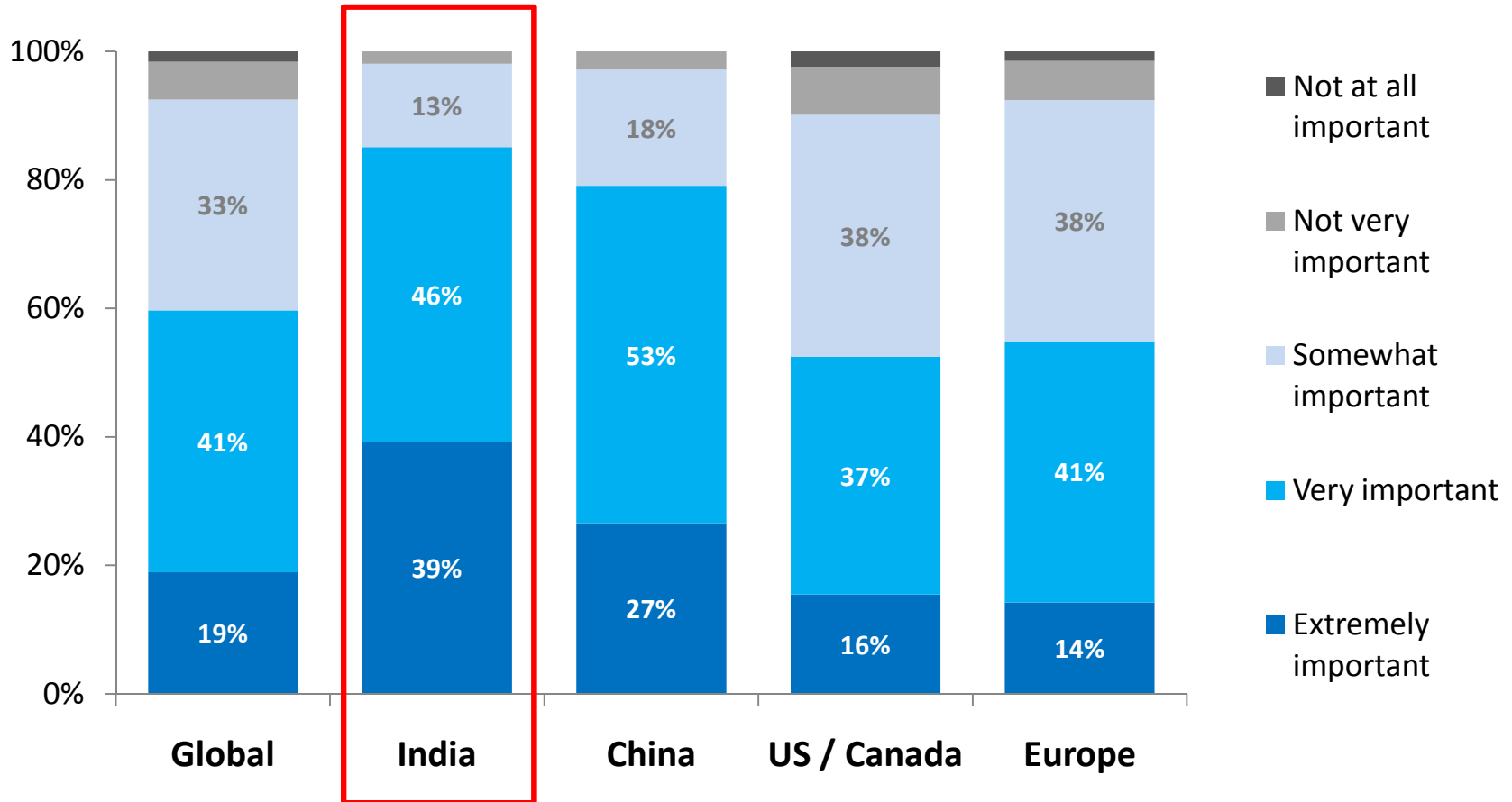
91%...

Say energy efficiency is a priority for new construction and retrofit projects



Energy management considered important throughout the world, particularly India and China

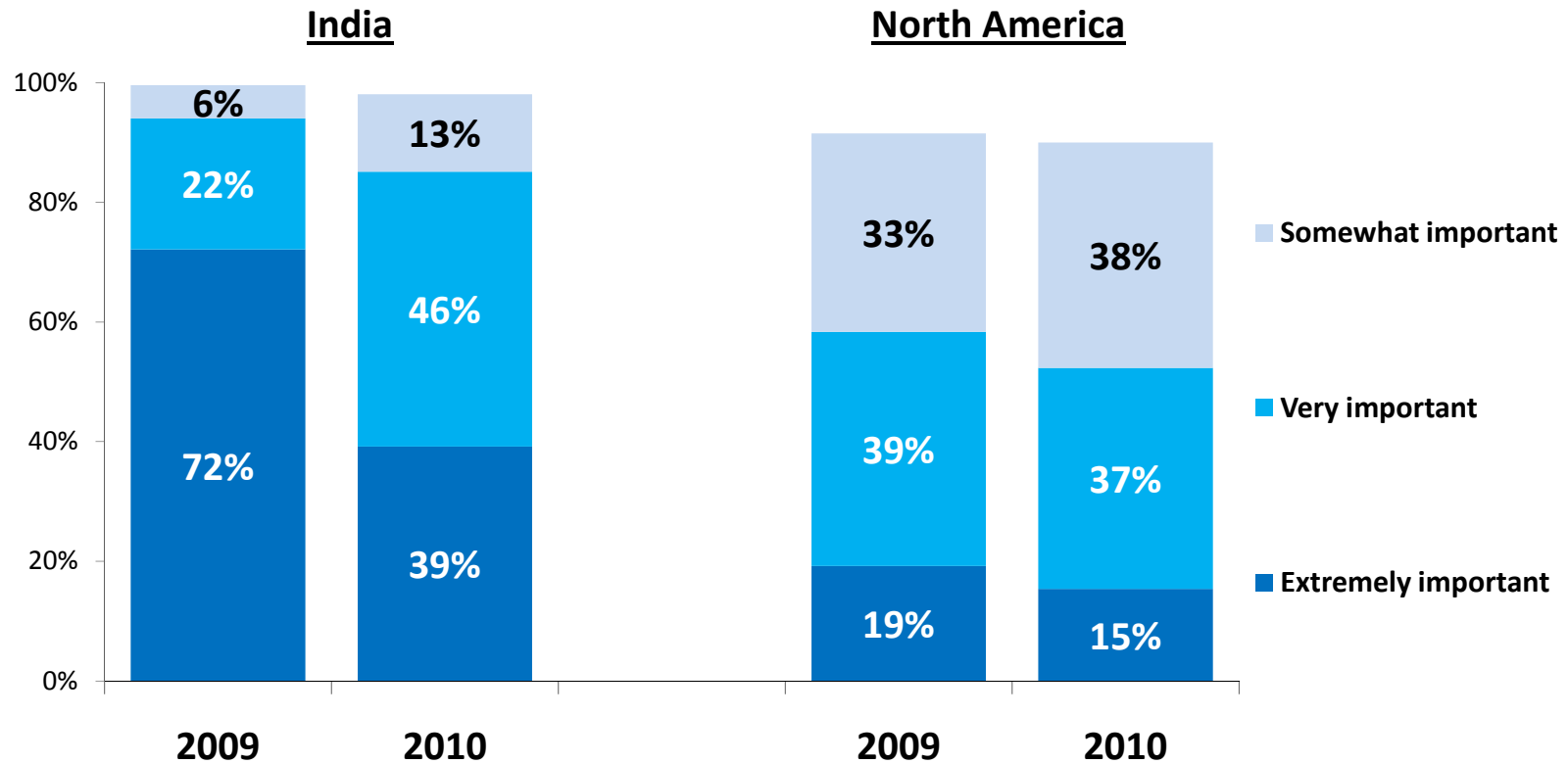
How important is energy management to your organization?





Yet the level of stated importance has dropped in both India and North America since 2009

How important is energy management to your organization?

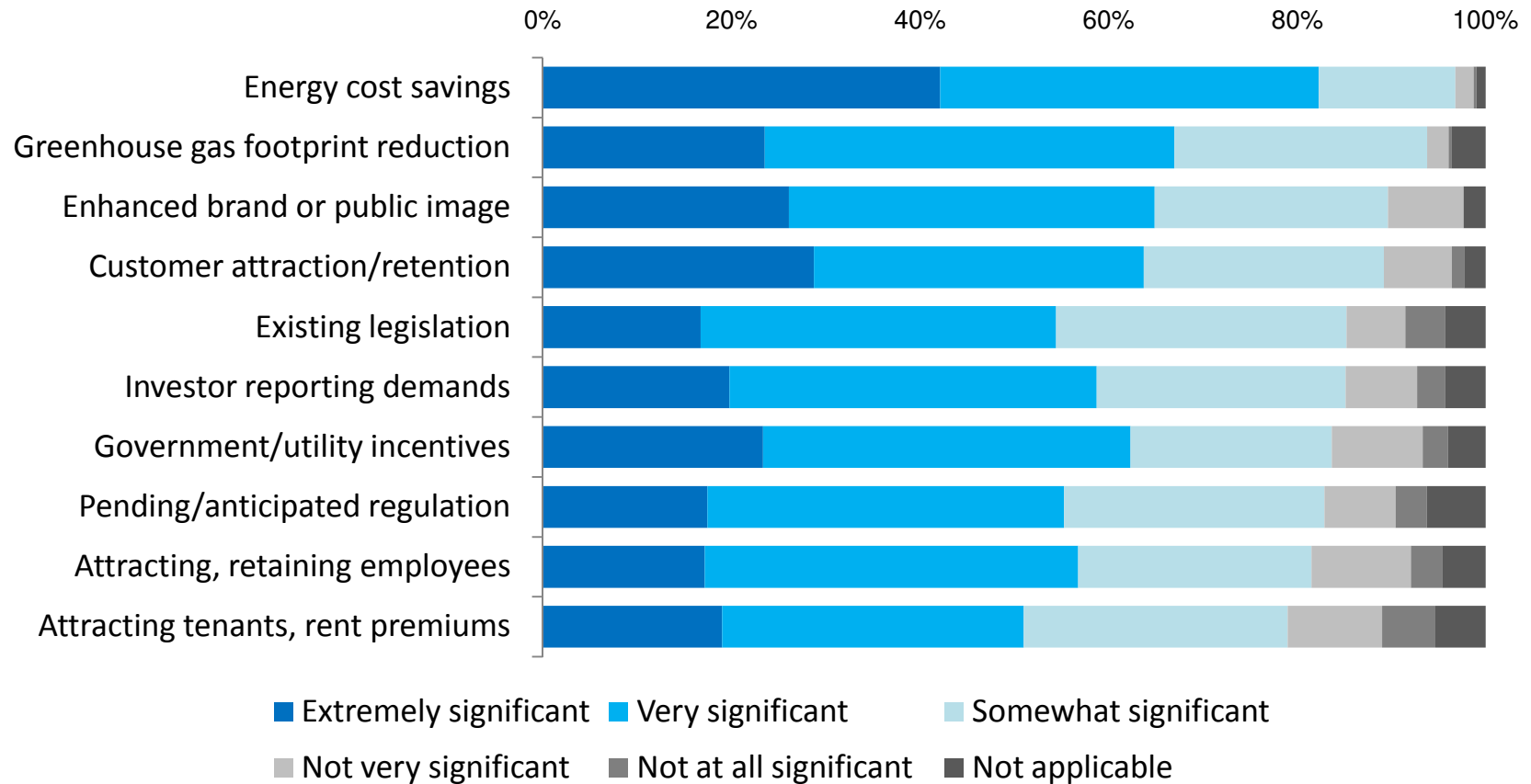




Reducing energy costs is the key driver in India

Carbon, public image, customer attraction also notably high

How significant an influence are the following in your organization's energy efficiency decisions?





Energy costs is top driver in all regions; Climate concerns are more important in India vs. North America

Global

1. Energy cost savings
2. Greenhouse gas reduction
3. Enhanced public image
4. Government/utility incentives

India

1. Energy cost savings
2. Greenhouse gas reduction
3. Enhanced public image
4. Customer attraction/retention

U.S. / Canada

1. Energy cost savings
2. Enhanced public image
3. Government/utility incentives
4. Greenhouse gas reduction

Europe

1. Energy cost savings
2. Greenhouse gas reduction
3. Existing legislation
4. Enhanced public image

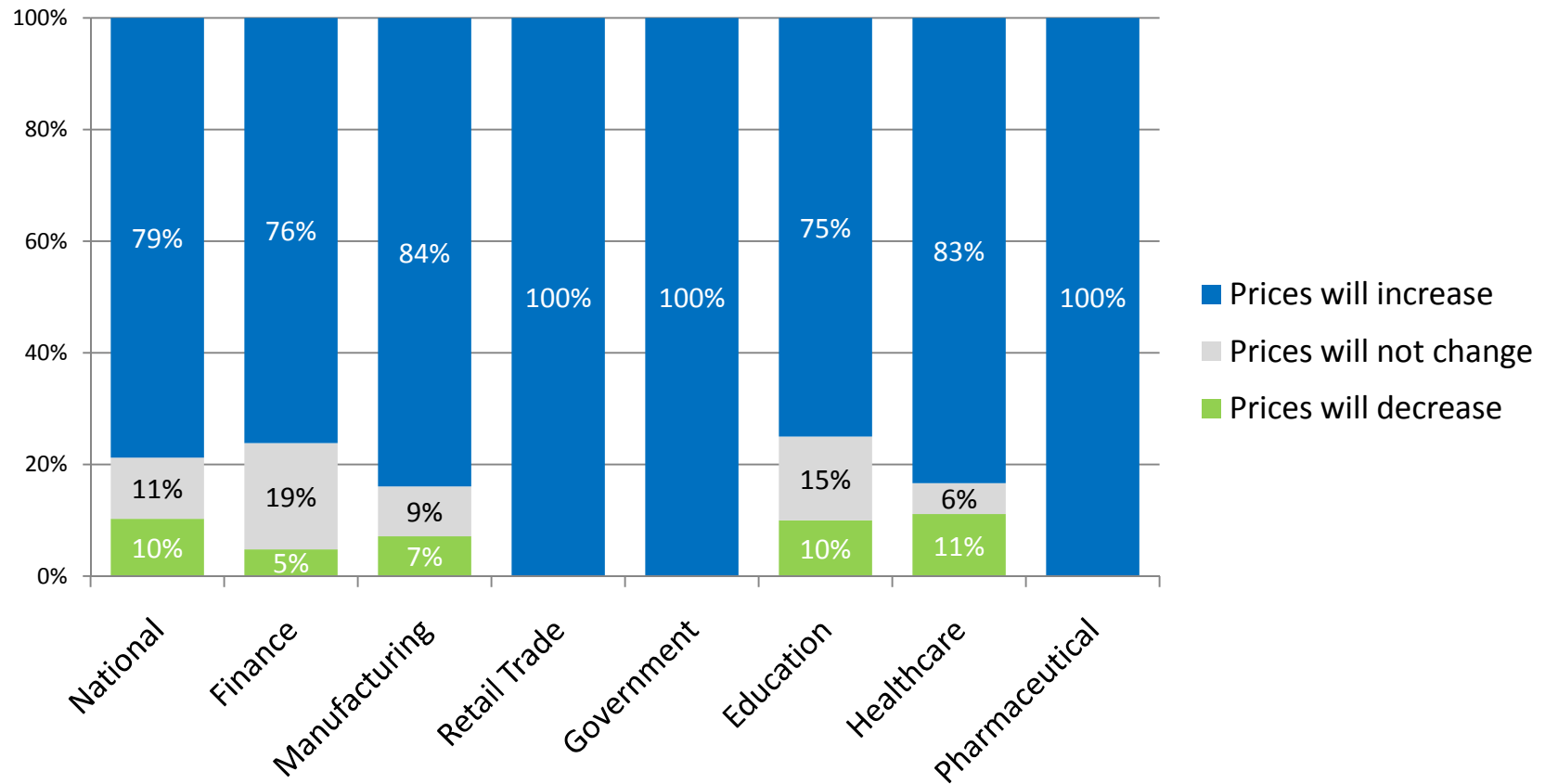
China

1. Energy cost savings
2. Greenhouse gas reduction
3. Enhanced public image
4. Customer attraction/retention



Strong belief in price increase consistent across industries in India

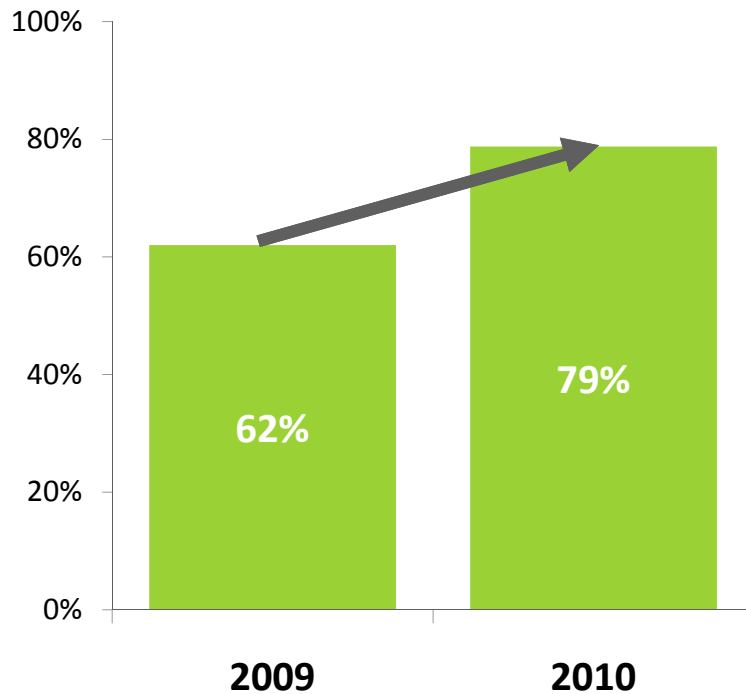
Do you believe the price of the energy your facilities use will increase, decrease, or not change significantly over the next 12 months?



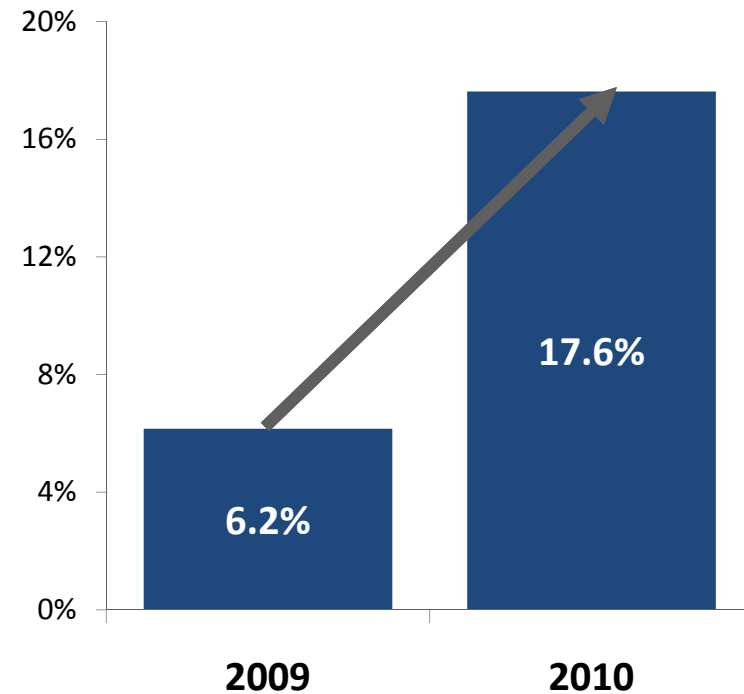


Greater energy price increases expected in 2010 compared with responses from 2009

Do you believe the price of the energy will increase over the next 12 months?



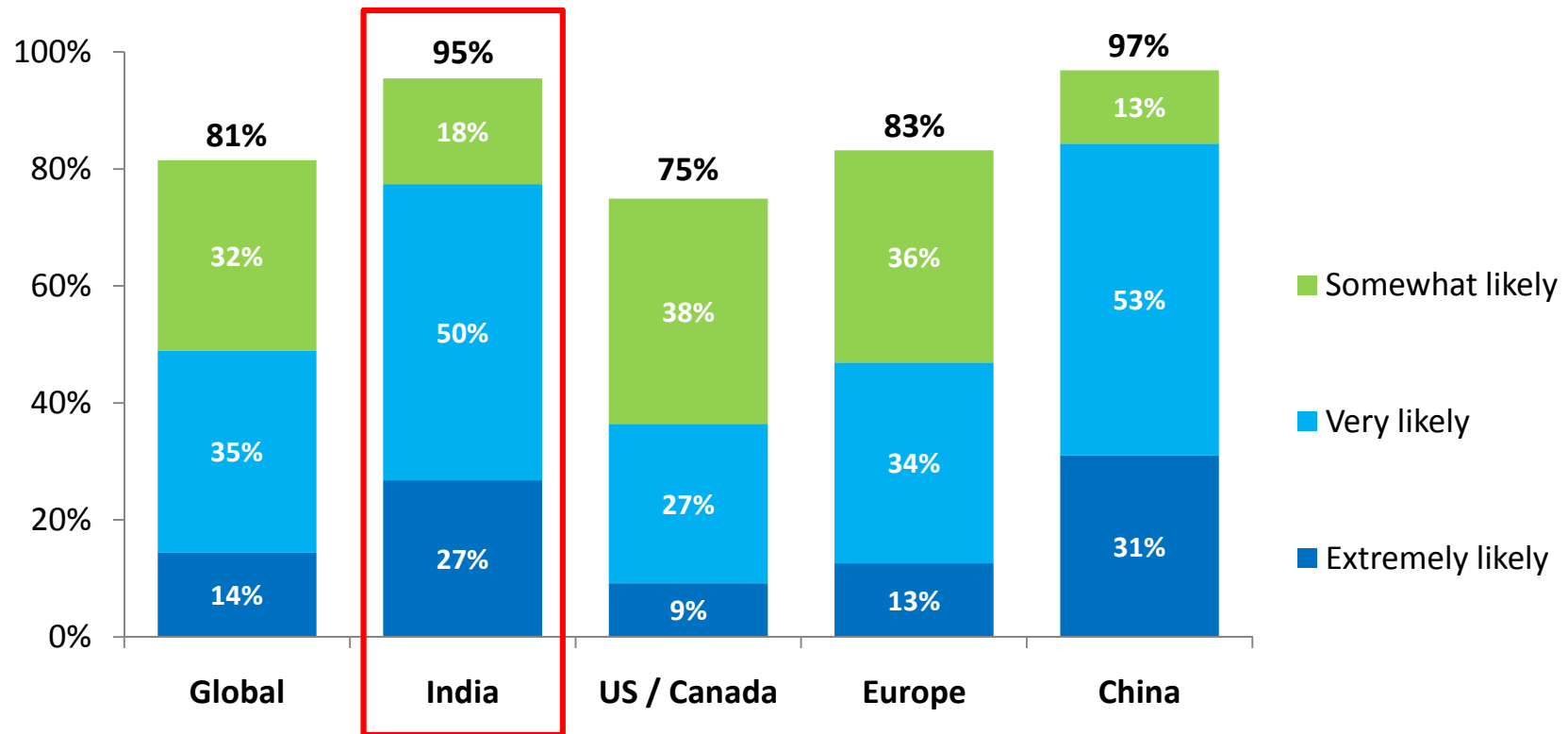
Average expected change in energy prices over the next 12 months





Significant legislation expected within two years around the world, especially so in India and China

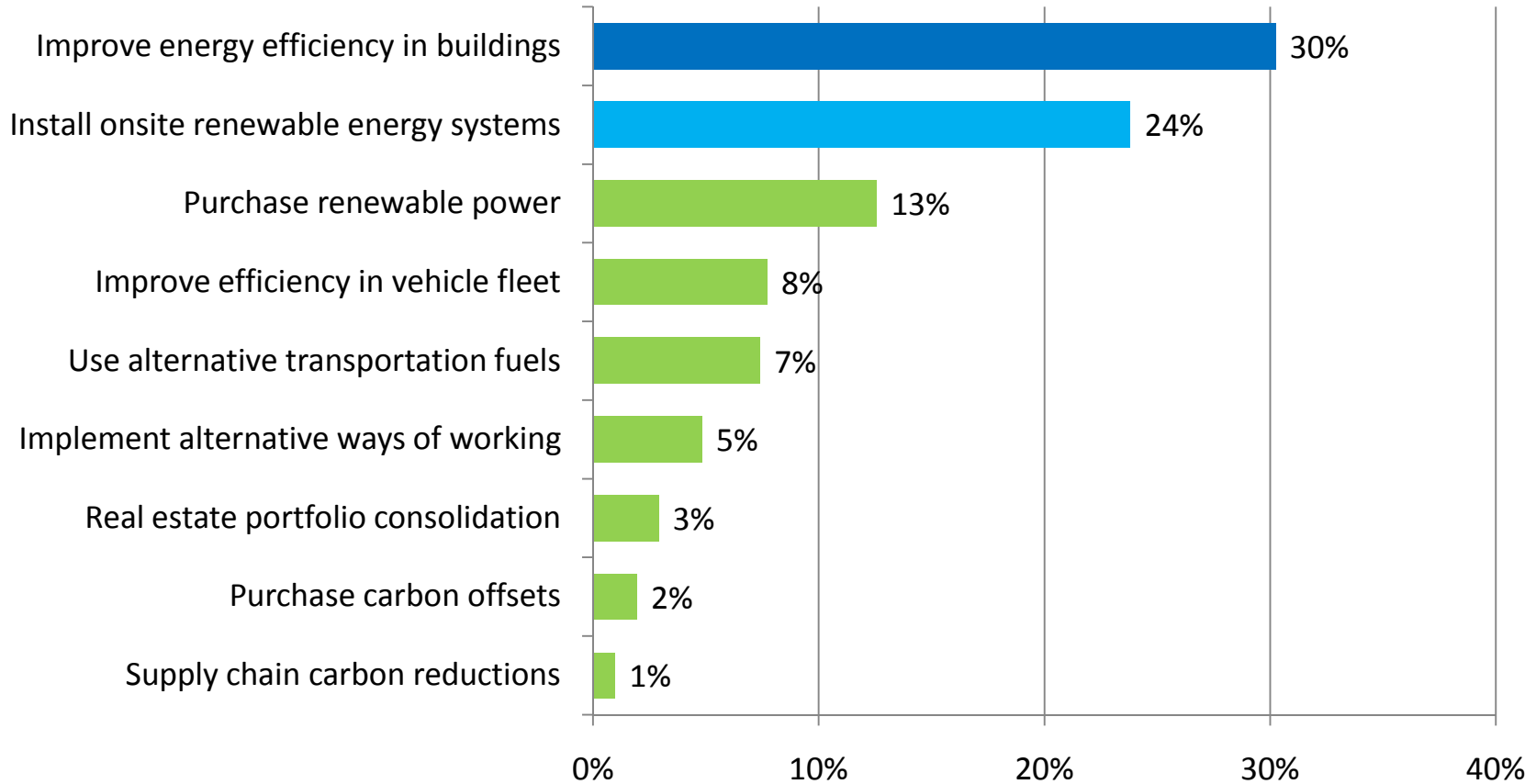
How likely is significant legislation mandating energy efficiency and/or carbon reduction within the next 2 years?





Improve energy efficiency in buildings is top carbon emissions reduction strategy in India

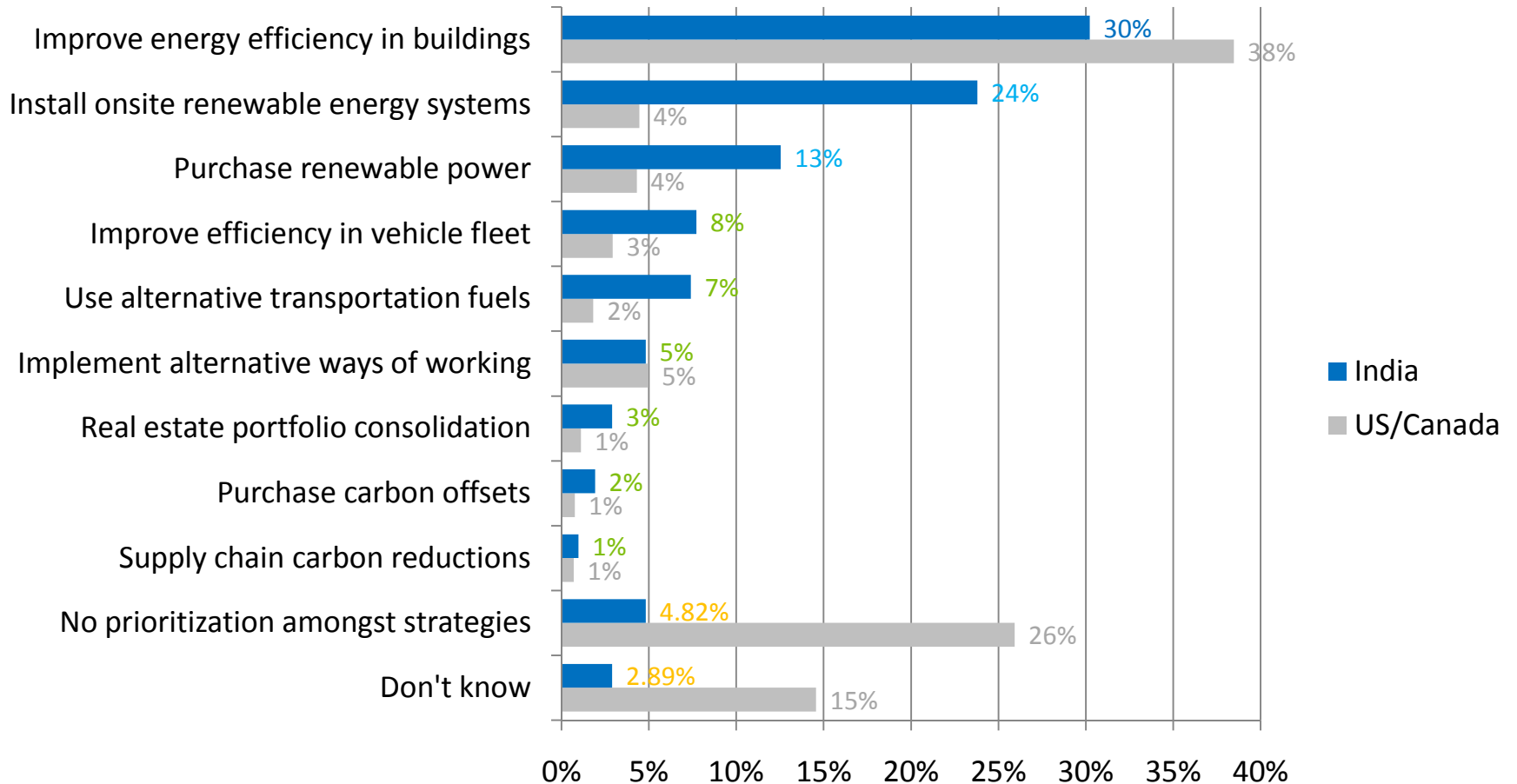
What is your organization's top strategy to reduce its carbon emissions?

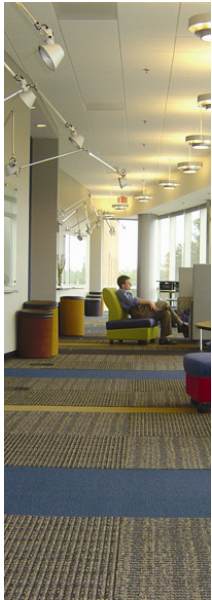




Indian business leaders are more aware of their organizations' carbon reduction strategy

What is your organization's top strategy to reduce its carbon emissions?





Investment Plans & Financial Criteria

Energy Efficiency Indicator 2010 India Results

Energy Efficiency Indicator – India 2010
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The recession had a mixed impact on investment
Some say they invested *more* in efficiency as a result

As a result of the recession in India...

59% invested less,

15% invested at historically consistent levels,
and

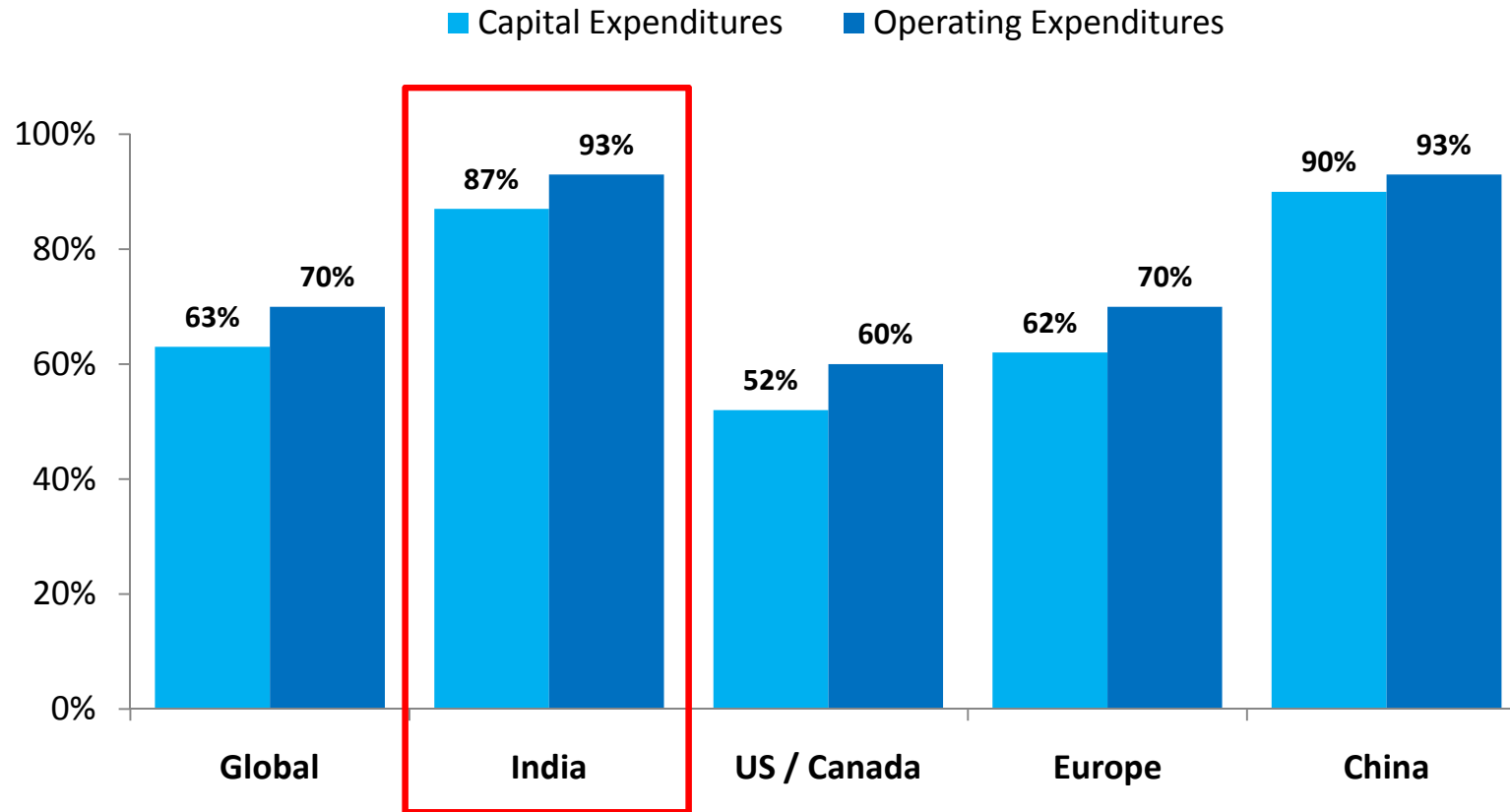
26% invested more in energy efficiency

...over the past 12 months



Almost all Indian organizations plan to make energy efficiency investments in 2010

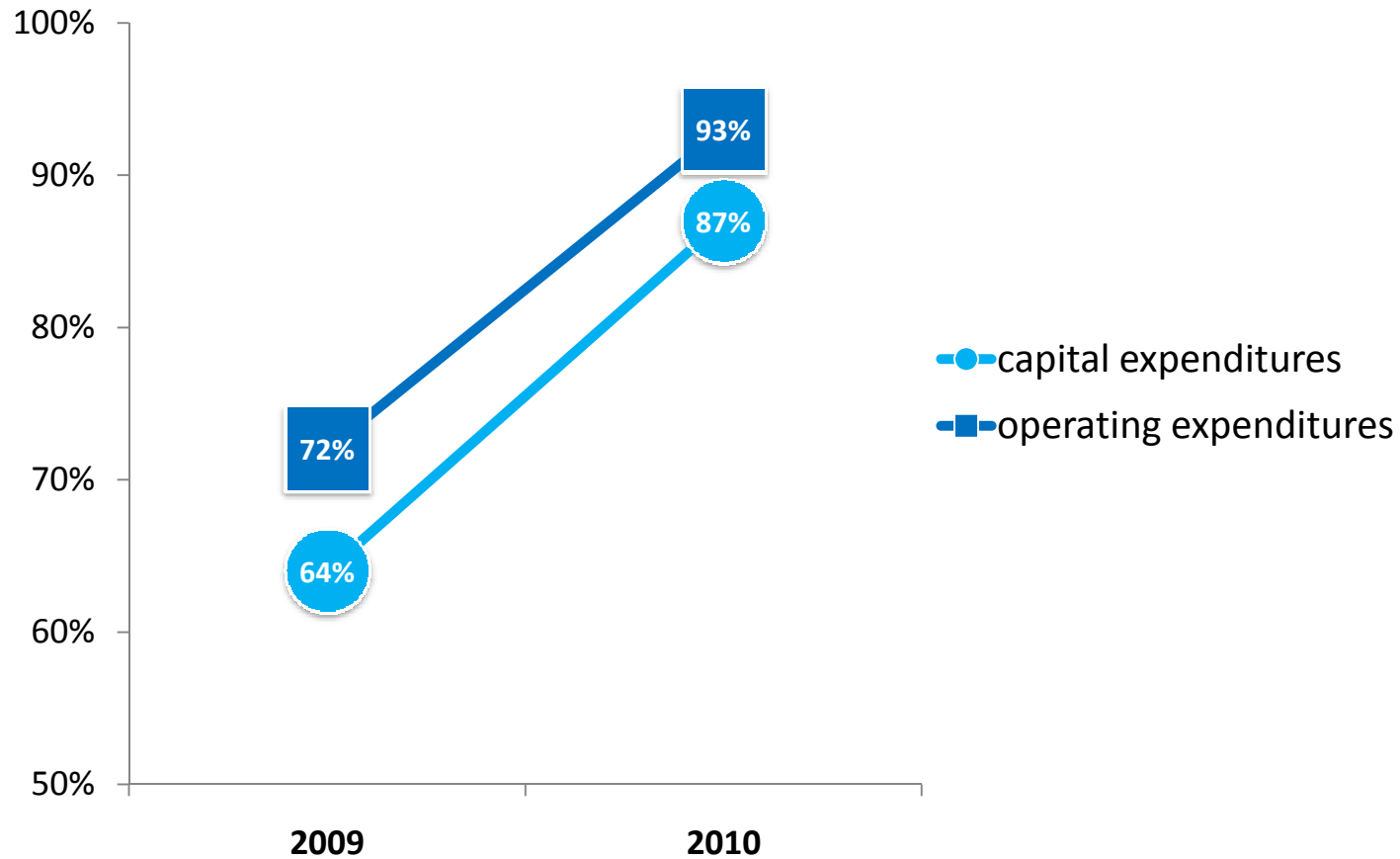
Fraction planning to make energy efficiency investments over the next 12 months with...





Planned energy efficiency spending to increase significantly in India in 2010

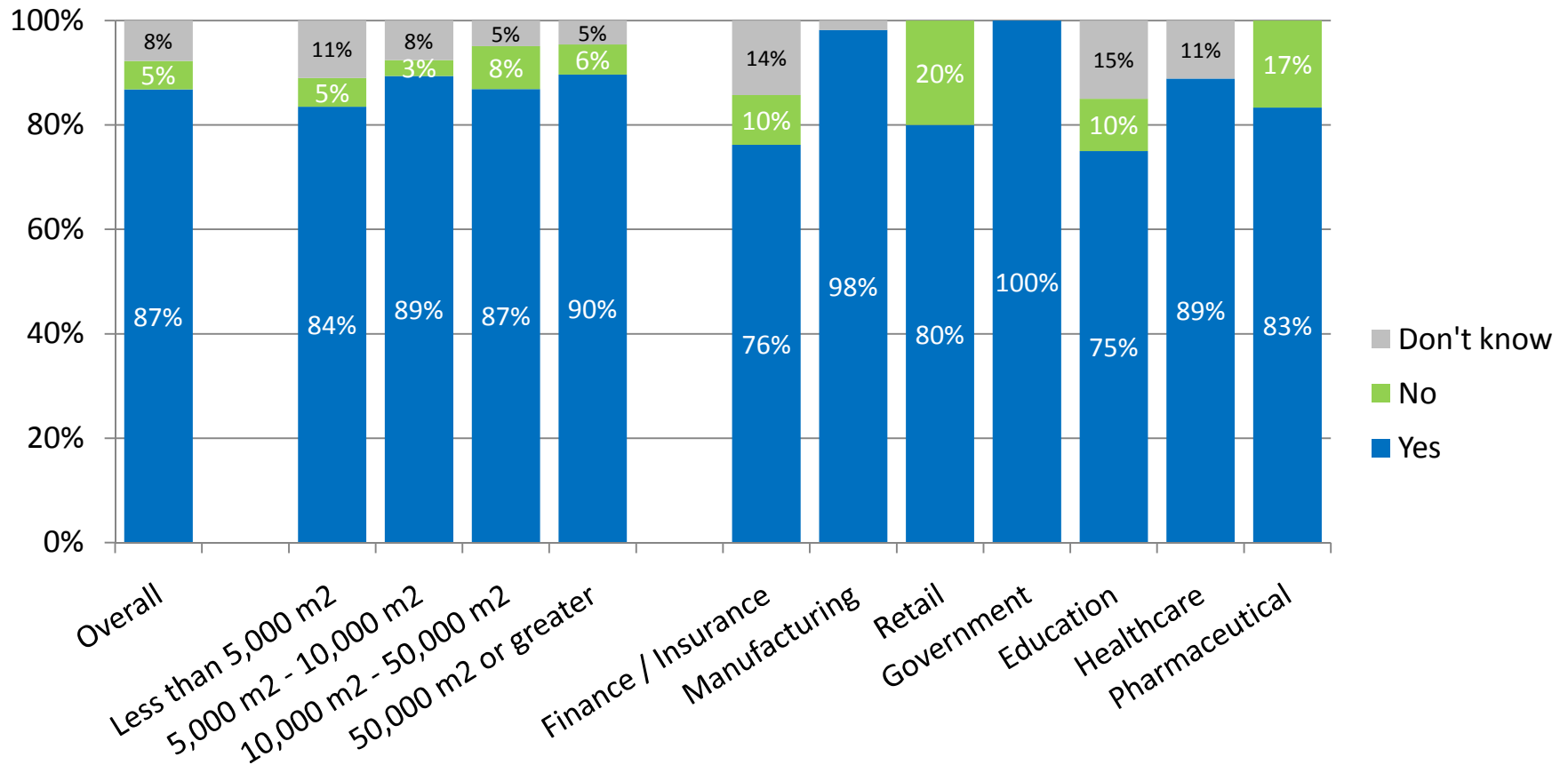
Percentage planning to make energy efficiency investments over the next 12 months with...





High levels of investment planned across all sectors and organization sizes

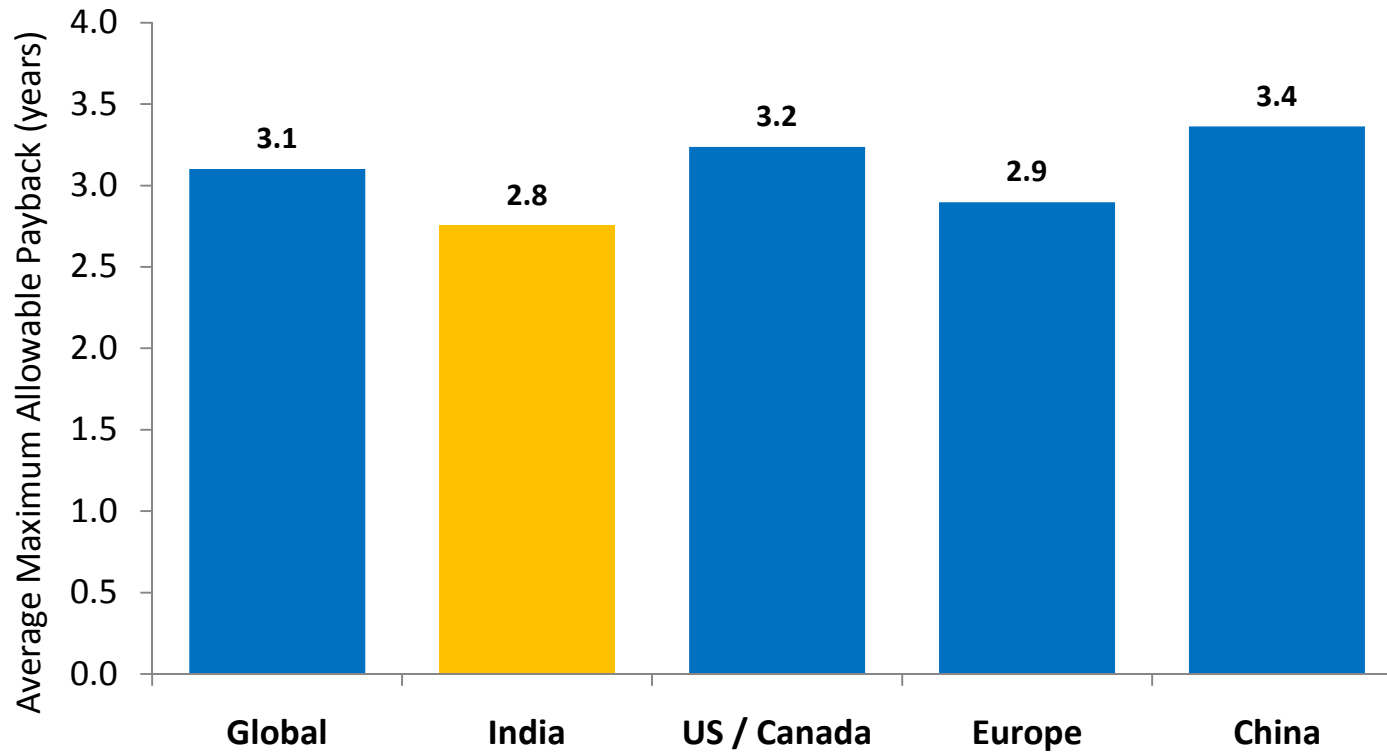
Do you expect your organization to make energy efficiency improvements financed with capital expenditures over the next 12 months





Indian organizations require the fastest payback in the world

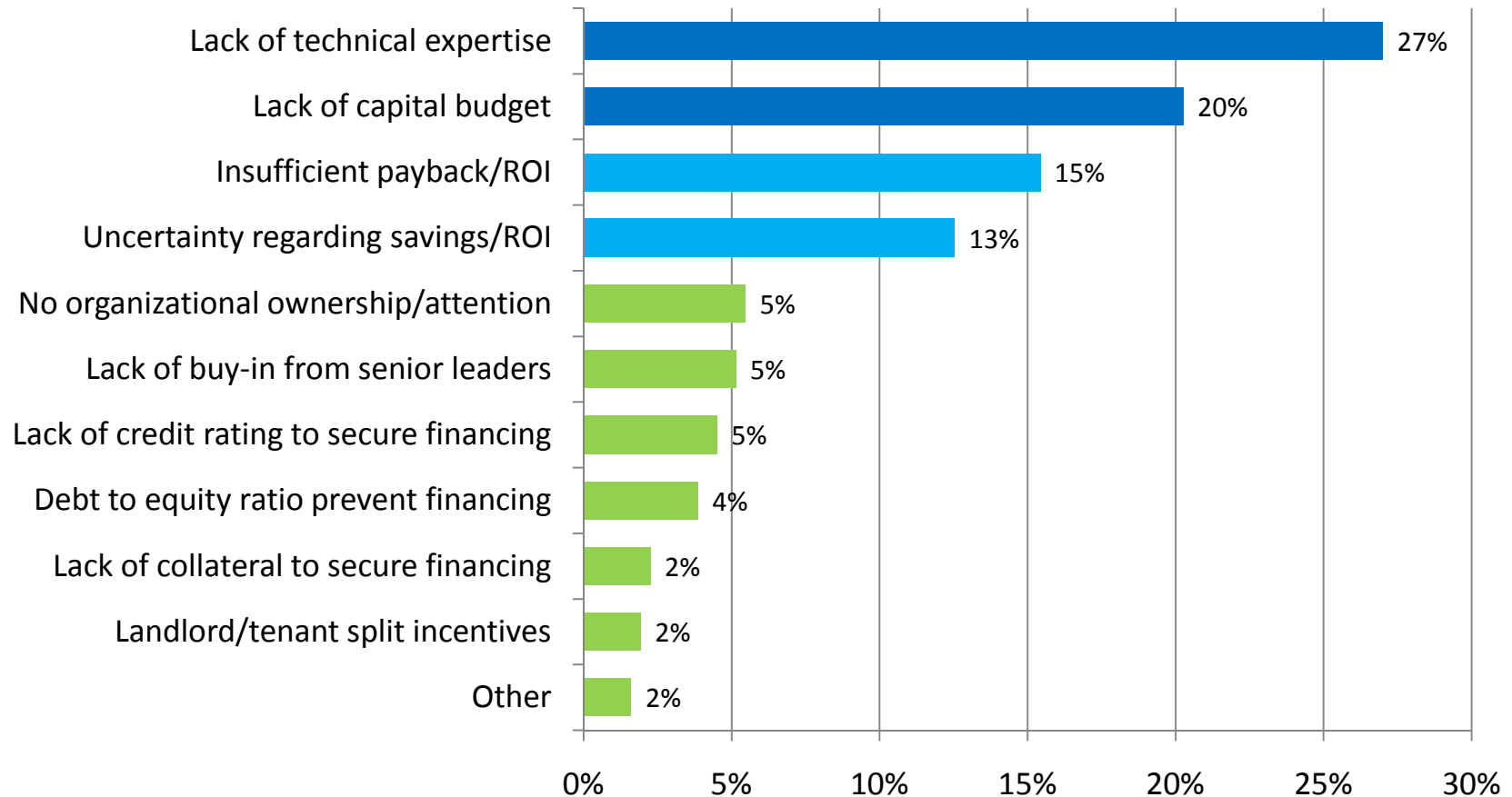
What is the longest payback period you would allow for a significant energy efficiency investment?





Lack of technical expertise and capital the greatest barriers to energy efficiency in India

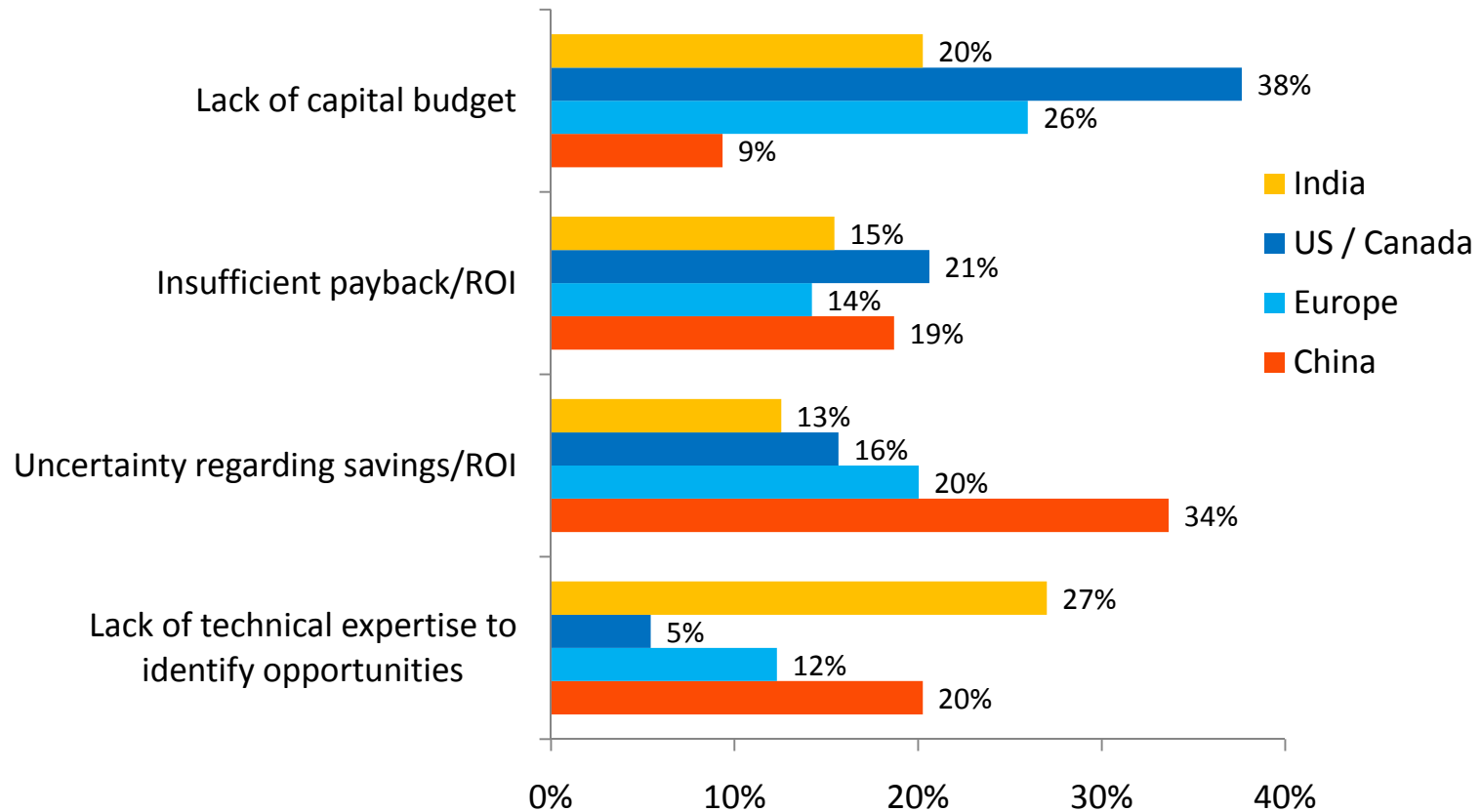
What is the top barrier to capturing energy savings for your organization?

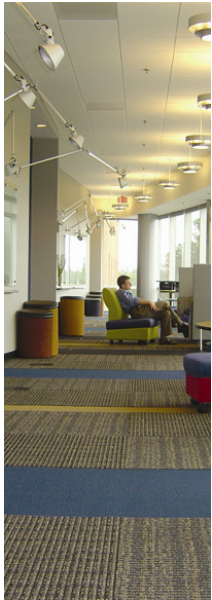




Need certainty and more expertise in India and China Need capital in North American and Europe

What is the top barrier to capturing energy savings for your organization?





Practices & Technologies

Energy Efficiency Indicator 2010 India Results

Energy Efficiency Indicator – India 2010
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Significant amount of efficiency measures implemented over the past 12 months in India

Most Common Practices

81% switched to more energy efficient lamps, ballasts, or lighting fixtures

75% educated facilities operations staff

69% educated building occupants

55% installed energy-saving glass

50% installed renewable energy system

Other Notable Measures

48% Replaced inefficient equipment before the end of its useful life

48% Increased preventive maintenance schedules

48% Installed occupancy or daylight sensors so lights come on and off as needed

46% Re-roofed with white roof covering to reduce heat gain

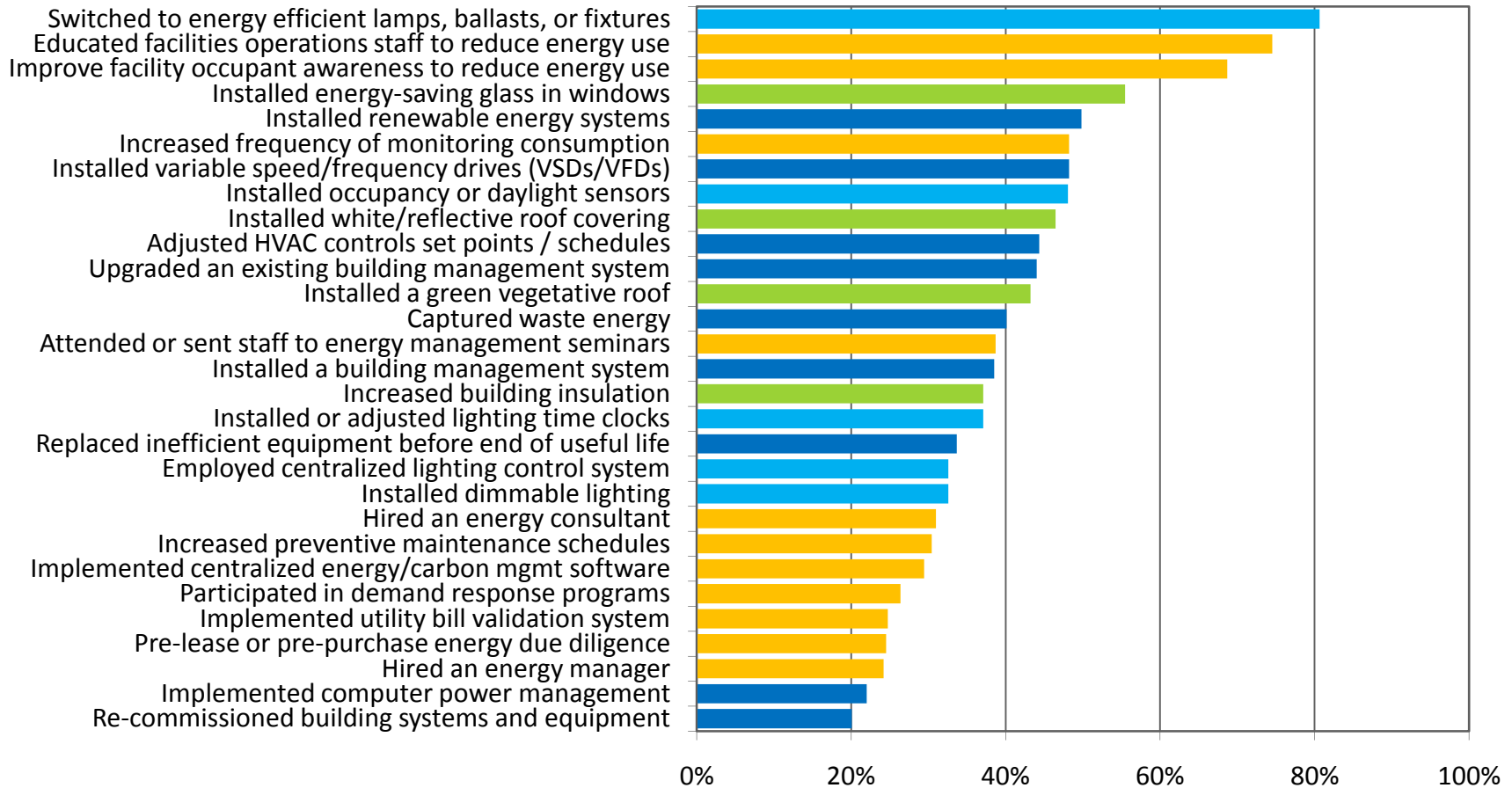
46% Self-generate power during demand peaks



Measures implemented in India over past 12 months balanced across 4 categories

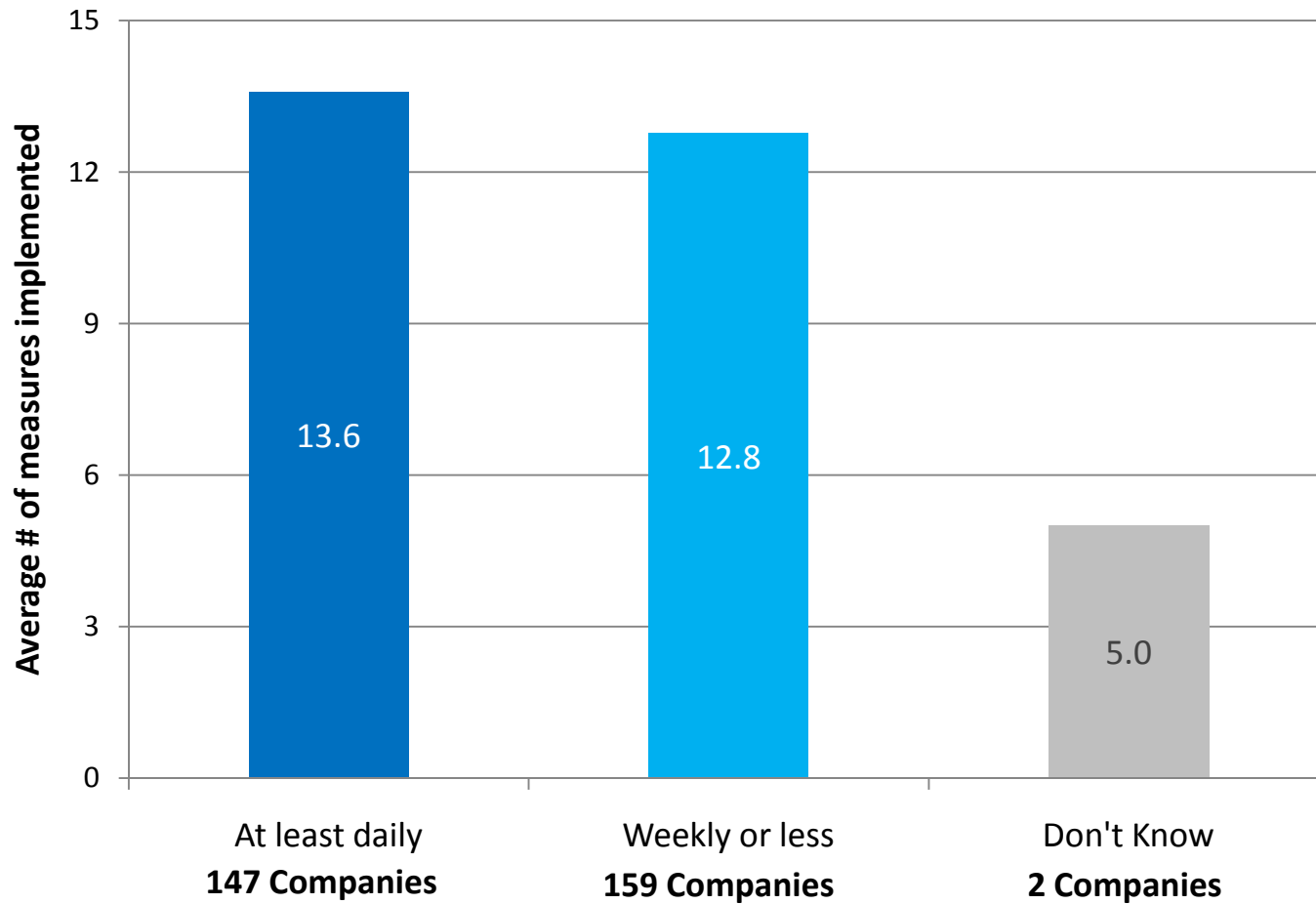
Which measures has your organization adopted in the last 12 months?

■ Operations-Related
 ■ Bldg System-Related
 ■ Lighting-Related
 ■ Envelope-Related





Indian organizations tracking energy use more frequently have implemented more energy-saving measures



How frequently does your company/organization track its energy consumption data?



More Indian organizations seeking green buildings certificates; Renewable energy on the radar

64% seeking green building certification for new construction projects, up from **17%** in 2009

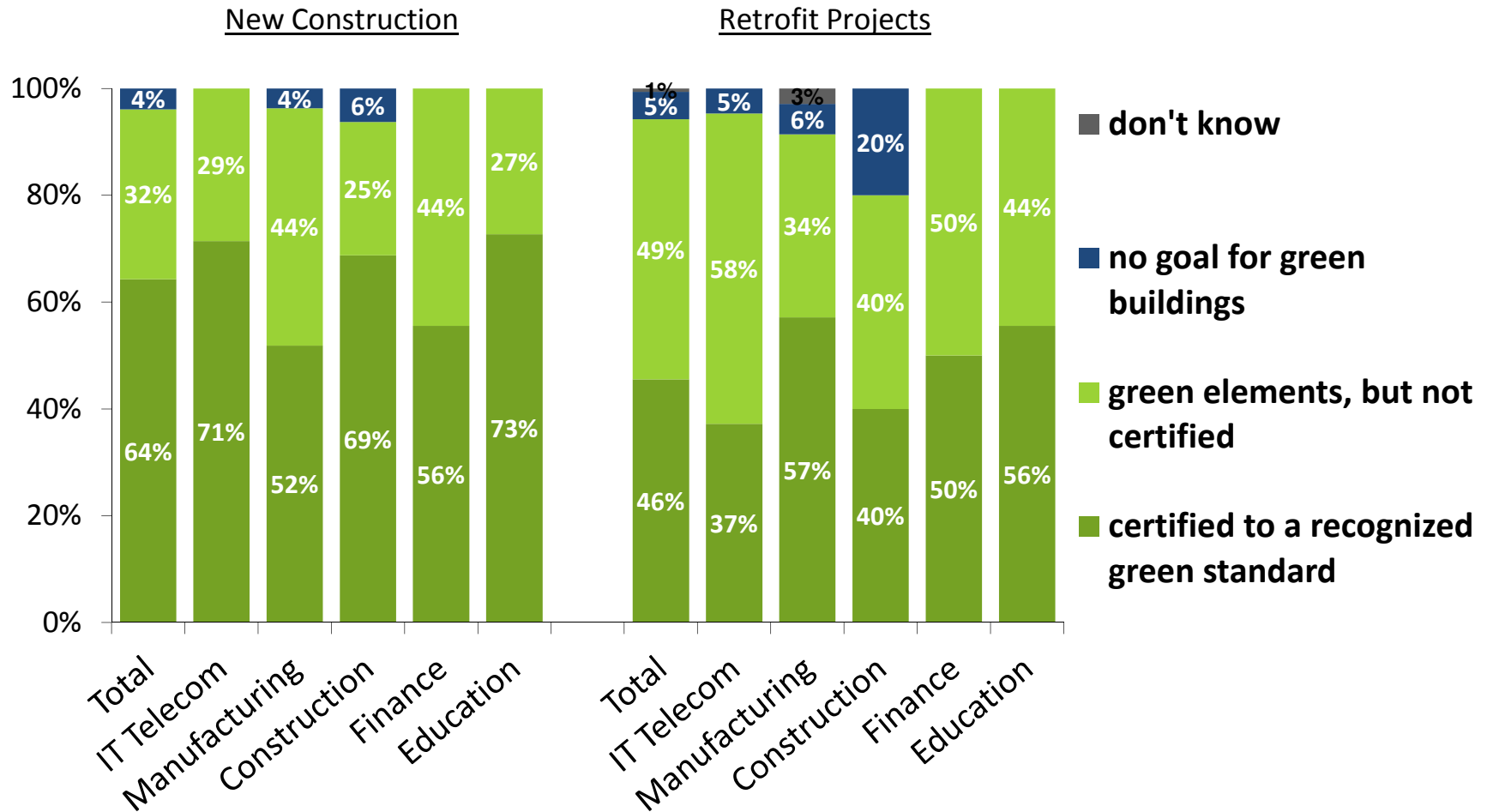
38% have at least one green certified building

73% considering solar PV, **54%** considering solar thermal, **41%** considering wind energy in new construction and retrofit projects



Education, IT, and construction sectors lead in targeting green building certification in India

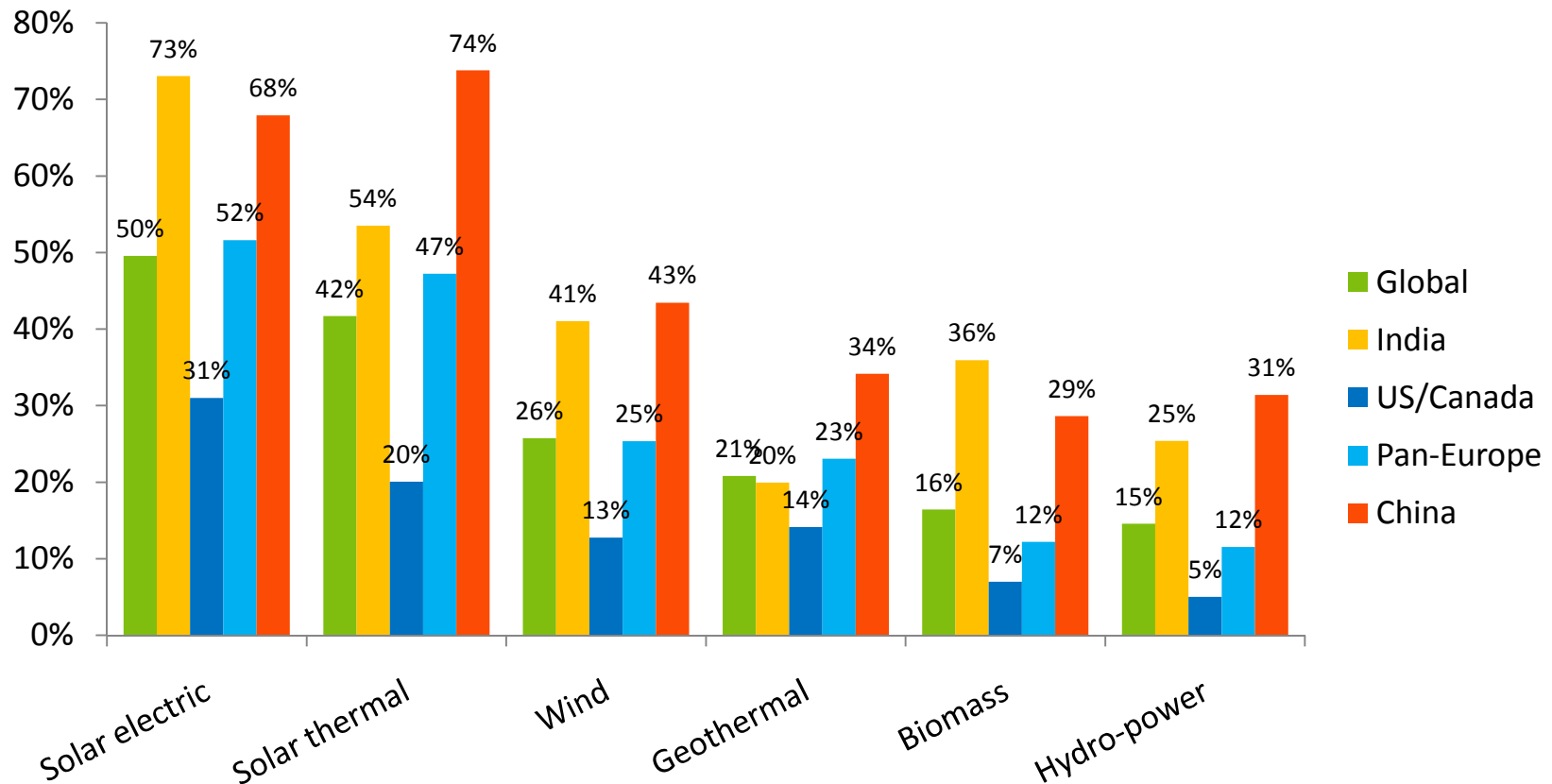
What are your goals with respect to green buildings?





India and China lead in *considering* renewable energy

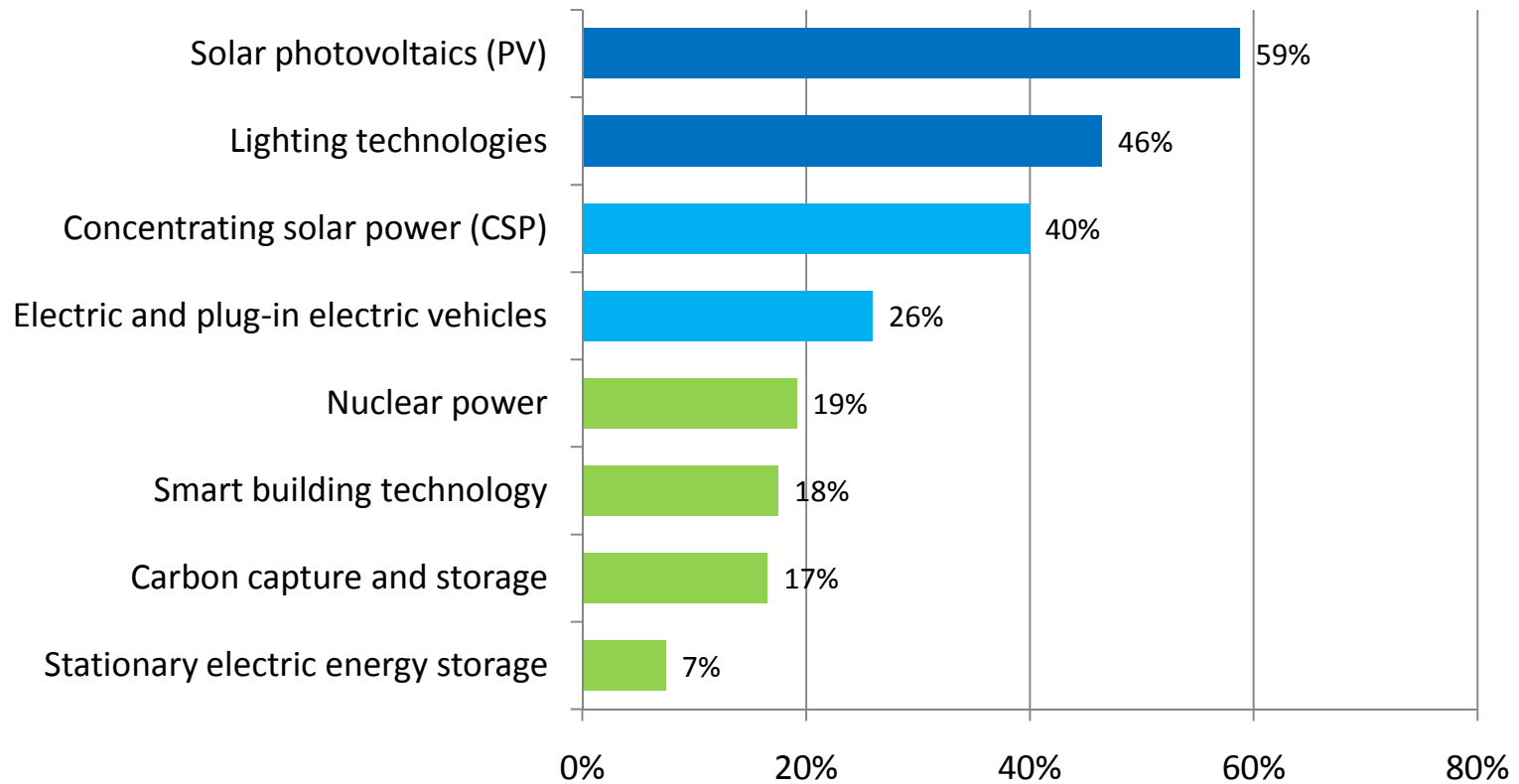
Which renewable energy technologies is your organization considering or utilizing in construction or retrofit projects?





High expectations for solar photovoltaic and lighting technologies in India

Which technology do you expect to have the greatest performance-price ratio improvement over the next ten years (select up to 3)?





Conclusions

■ **Energy efficiency is high on corporate agendas**

85% of business leaders in India consider energy management very or extremely important, more than any other country surveyed in 2010.

■ **Cost and carbon savings are the primary motivators**

Cost savings is a significant factor in energy decision making for 97% of respondents. Decision makers expect energy prices to increase by 17% this year. 94% also cite greenhouse gas emissions reductions as a factor.

■ **Despite recession, investment remains strong**

41% invested the same or more in energy efficiency over the last 12 months. 87% plan to make capital investments in energy efficiency in 2010.

■ **Yet, a lack of technical expertise limits activity**

The top barrier to energy savings cited by leaders in India is a lack of technical expertise to identify opportunities (27%), followed by limited capital availability (20%), and insufficient return on investment (15%).