2017 Energy Efficiency Indicator Survey: POLAND RESULTS

Johnson Controls conducts an annual Energy Efficiency Indicator survey tracking current and planned investments, key drivers, and organizational barriers to improving energy efficiency in facilities. Since the first survey was released in 2007, almost 24,000 energy and facility management leaders have been surveyed.

Highlights from the 2017 Poland Survey:

- Energy efficiency is increasing in importance and investment remains high. 83% of organizations are paying more attention to energy efficiency than they were one year ago, which is translating into investment. 45% of organizations plan to increase energy efficiency and renewable energy investments in the next year, with an additional 54% planning to keep their investment level the same.

- Greenhouse gas footprint reduction was the most important driver in energy investment decisions in Poland. 75% of organizations rated greenhouse gas footprint reduction as very or extremely important in driving investment decisions. Other important drivers included energy cost savings (73% of respondents rating it as very or extremely important), increasing energy security (73% of respondents rating it as very or extremely important), increasing building resilience to weather and energy system disruptions (69% of respondents rating it as very or extremely important), investor reporting demands, (69% of respondents rating it as very or extremely important), and attracting and retaining employees (69% of respondents rating it as very or extremely important).

Drivers of energy efficiency investments:
Organizations rating as very or extremely significant

- Greenhouse gas footprint reduction: 75%
- Energy cost savings: 67%
- Increasing energy security: 65%
- Increase building resilience to weather and energy system disruptions: 52%
- Investor reporting demands: 45%
- Attracting, retaining employees: 56%
- Enhanced brand or public image: 61%
- Customer attraction/retention: 60%

The top energy efficiency measures adopted over the past twelve months include heating, ventilation, and air conditioning improvements (67%), onsite renewable energy (66%), energy focused behavioral or educational programs (55%), building controls improvements (53%), demand response / demand management (53%), and thermal energy storage (53%).
When asked about planned investment over the next twelve months, onsite renewable energy led the way with 58% of respondents indicating they would invest. It was followed by electric energy storage (55%), Energy focused behavioral or educational programs (54%), and heating, ventilation, air conditioning improvements (53%).

For 28% of respondents, the top barrier to pursuing energy efficiency is lack of funding to pay for improvements. Other common barriers include lack of technical expertise to evaluate or execute projects (24%) and uncertainty regarding savings/performance (17%).

Even with demand for green buildings increasing, more organizations plan to have net zero energy buildings than certified green buildings in the future. 45% of organizations already have or plan to have at least one certified green building in the future and 36% of organizations are willing to pay a premium for space in a certified green building. More organizations plan to achieve near zero, net zero or energy positive status for at least one building in the next 10 years, with 89% indicating it is very or extremely likely.

Resiliency is an increasingly important consideration for building infrastructure investments. 87% of organizations stated that maintaining critical operations during severe weather events or extended power outages is very or extremely important when considering future infrastructure investments. In addition, 51% of organizations are very or extremely likely to have one or more facilities able to operate off the grid in the next 10 years.

Building systems integration continues to build momentum as the focus on smart buildings increases. 45% of organizations invested in systems integration in the past 12 months and 45% plan to invest in the next 12 months. Energy management is leading the way with 54% of respondents indicating it has already been integrated with other building technology systems. This is followed by lighting (integrated with other building technology systems for 43% of respondents) and security systems (integrated with other building technology systems for 43% of respondents).

In Poland, public and private sector building efficiency targets are seen as the most effective policy driving energy efficiency improvements with 94% of respondents ranking them as very or extremely important. Other policies that are effective in driving energy efficiency improvement include performance benchmarking and certifications (93% of organizations rated as very or extremely important), and government leadership in leasing, building design, and retrofits (90% of organizations rated as very or extremely important), and financial incentives and programs (76% of organizations rated as very or extremely important).

### Highlight from the 2017 Poland Survey:

For more information go to www.johnsoncontrols.com/insights/2018/buildings/features/energy-efficiency-indicator-survey