

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 26,000 energy and facility management leaders have been surveyed. This year marks the 12th edition of the survey with over 1,900 respondents represented from twenty countries, including 100 leaders from the Netherlands.



### NETHERLANDS

### GLOBAL

#### INTEREST AND INVESTMENT IN ENERGY EFFICIENCY AND SMART BUILDING TECHNOLOGY

**84%** of organizations are paying more attention

**71%** of organizations plan to increase energy efficiency and renewable energy investments

**22%** plan to keep their investment level the same

Globally, **59%** of organizations plan to increase investment, up slightly from **58%** last year

#### DRIVERS IN ENERGY INVESTMENT DECISIONS

1. Energy cost savings
2. Attracting / retaining employees
3. Investor reporting demands
4. Attracting tenants, rent premium
5. Improving occupant health / wellness

1. Energy cost savings
2. Greenhouse gas footprint reduction
3. Increasing energy security
4. Enhanced brand or reputation
5. Attracting / retaining employees

#### TOP BARRIERS TO INVESTMENT

**35%** Lack of funding to pay for improvements

**24%** Lack of technical expertise to evaluate or execute projects

**14%** Insufficient payback / return-on-investment

**28%** Lack of technical expertise to evaluate or execute projects

**22%** Lack of funding to pay for improvements

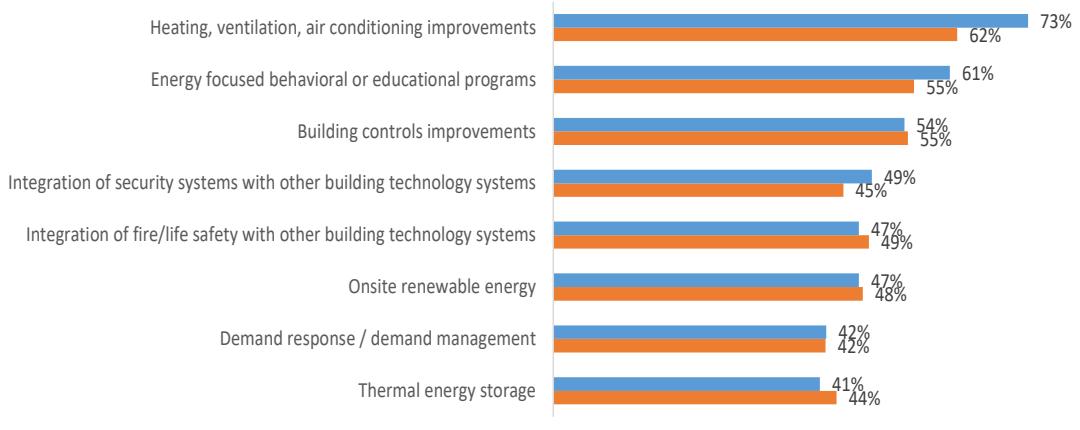
**18%** Uncertainty regarding savings and performance

### TOP ENERGY EFFICIENCY MEASURES

#### PAST 12 MONTHS

1. Heating, ventilation and air-conditioning improvements
2. Energy focused behavioral programs
3. Integration of fire / life safety systems
4. Integration of security systems
5. Building controls improvements
6. Onsite renewable energy
7. Demand response / demand management
8. Fire / life safety system improvements

#### NEXT 12 MONTHS



■ Netherlands ■ Global

# 2018 ENERGY EFFICIENCY INDICATOR SURVEY NETHERLANDS

For more information on the study,  
please visit [www.johnsoncontrols.com](http://www.johnsoncontrols.com)

- Building systems integration is on the rise with almost forty percent of the respondents in the Netherlands indicating they would invest over the coming 12 months.
- In the Netherlands, **cybersecurity, data analytics / machine learning** and **systems integration** were identified as the technology trends and issues to have the biggest impact on the implementation of smart buildings over the next five years. Globally, the top technology trends were identified as cybersecurity, systems integration, and the Internet of Things.

	NETHERLANDS	GLOBAL
GREEN BUILDING CERTIFICATION	<b>10%</b>  <b>38%</b>	Already achieved voluntary green building certification  Plan to in the future
GREEN BUILDING TENANT SPACE	<b>52%</b>	Willing to pay a premium to lease space in a certified green building
NET ZERO ENERGY/ CARBON	<b>33%</b>	Extremely or very likely to have one or more facilities that are nearly zero, net zero or positive energy or carbon status in the next ten years.
OPERATE OFF THE GRID	<b>50%</b>	Extremely or very likely to have a facility that will operate off the grid in the next ten years
RESILIENCE	<b>68%</b>	Indicated that it is an extremely or very important factor when considering future energy and building infrastructure investments.

## 2018 Netherlands Survey Demographics

To qualify, respondents must have facility budget responsibility and propose or approve energy efficiency initiatives for their organization. The survey was administered anonymously by a third party partner. For the 2018 Netherlands survey, there was a representative mix of respondents from institutional, commercial, and industrial organizations. In addition, there was a range of organizational titles, including C-level executives, vice presidents, directors and managers.

