



Public data underlying the figures of Annual Report on the Results of Monitoring the Internal Electricity and Natural Gas Markets in 2015

Electricity and Gas Retail Markets Volume

January 2017

Legal notice

This document is a joint publication of the Agency for the Cooperation of Energy Regulators and the Council of European Energy Regulators. The document and its contents are protected by copyright. Reuse is authorised provided appropriate acknowledgement is given as follows: © Agency for the Cooperation of Energy Regulators and Council of European Energy Regulators, 2016.

The Agency for the Cooperation of Energy Regulators and the Council of European Energy Regulators accept no responsibility or liability whatsoever with regard to the contents of this document and their use, including but not limited to any errors, inaccuracies or omissions.



ACER
Mr David Merino
Telephone: +386 (0)8 2053 417
E-mail: david.merino@acer.europa.eu



CEER
Mr Andrew Ebrill
Telephone: +32 (0)2 788 73 35
E-mail: andrew.ebrill@ceer.eu

Figure 1, Page 7: Overall and household demand for electricity and gas in Europe – 2008–2015 (TWh and index change, 2008 = 100)

Source: Eurostat (26 April 2016), CEER National Indicators Database (2016) and ACER calculations.

Year	Electricity (TWh)	Gas (TWh)	Electricity*	Gas*	Electricity by households*	Gas by households*	GDP*
2008	3065	5685	100	100	100	100	100
2009	2925	5354	95	94	103	100	94
2010	2976	5717	97	101	105	109	98
2011	2981	5120	97	90	95	91	101
2012	2978	5025	97	88	100	99	103
2013	2963	4989	97	88	106	100	104
2014	2874	4455	94	78	105	83	107
2015	2935	4648	96	82	110	87	113

*2008 base year

Figure 2, Page 9: Electricity POTP trends for household and industrial consumers in EU28 – 2008–2015 (euro cents/kWh and index change, 2008 = 100)

Source: Eurostat (26 April 2016) and ACER calculations.

Year	Electricity HH prices (euro cents/kWh)	Electricity IND prices (euro cents/kWh)	Electricity HH prices*	Electricity IND prices*
2008	16.22	10.14	100.00	100.00
2009	16.38	10.36	100.96	102.17
2010	17.00	10.18	104.78	100.44
2011	18.20	11.02	112.21	108.68
2012	19.22	11.50	118.50	113.42
2013	20.10	11.72	123.89	115.64
2014	20.43	11.71	125.92	115.54
2015	20.78	11.59	128.11	114.36

*2008 base year

Figure 3, Page 10: Gas POTP trends for household and industrial consumers in EU28 – 2008–2015
(euro cents/kWh and index change, 2008 = 100)

Source: Eurostat (26 April 2016) and ACER calculations.

Year	Gas HH prices (euro cents/KWh)	Gas IND prices (euro cents/KWh)	Gas HH prices*	Gas IND prices*
2008	5.76	3.55	100.00	100.00
2009	5.52	3.02	95.92	85.19
2010	5.42	3.03	94.09	85.33
2011	6.04	3.43	104.87	96.61
2012	6.62	3.76	115.03	106.06
2013	6.79	3.74	117.98	105.50
2014	6.93	3.51	120.42	99.01
2015	6.64	3.30	115.38	93.09

*2008 base year

Figure 4, Page 11: Difference between the POTPs in nominal terms and PPP for electricity and gas household consumers – 2015 (euro cents/kWh)

Source: Eurostat (26 April 2016) and ACER calculations.

Group	MS	POTP	PPP POTP	
EU	NO	15.24	10.85	
	FI	15.41	12.41	
	SE	18.63	14.62	
	LU	17.67	14.78	
	FR	16.50	15.01	
	MT	12.62	15.72	
	UK	21.54	16.64	
	NL	18.95	17.34	
	EE	12.97	17.62	
	AT	19.96	18.22	
	CZ	12.83	19.95	
	HU	11.36	20.14	
	SI	16.10	20.14	
	BE	22.39	20.24	
	BG	9.50	20.35	
	LT	12.50	20.50	
	HR	13.15	20.74	
	EU28	20.78	20.78	
	CY	18.98	21.22	
	GR	17.69	21.49	
	IE	24.40	21.91	
	DK	30.55	22.68	
	SK	15.12	22.77	
	LV	16.43	24.15	
	IT	24.39	24.27	
	PL	14.31	24.80	
	RO	13.11	25.93	
	ES	23.40	26.14	
	DE	29.49	28.29	
	PT	22.82	29.31	
	ENC	SRB	6.10	13.35
		BiH	8.12	16.80
AL		8.16	19.00	
MNG		9.85	19.51	
FYROM		8.31	20.32	

Group	MS	POTP	PPP POTP
EU	LU	4.89	4.09
	UK	6.52	5.04
	BE	6.03	5.44
	EE	4.20	5.71
	DK	7.83	5.82
	HU	3.53	6.25
	IE	6.99	6.27
	RO	3.26	6.45
	DE	6.79	6.51
	FR	7.17	6.52
	AT	7.21	6.58
	EU28	6.64	6.64
	NL	7.68	7.03
	LT	4.30	7.05
	LV	4.91	7.21
	HR	4.66	7.35
	SK	4.96	7.47
	SI	6.19	7.74
	IT	8.36	8.31
	PL	5.00	8.66
	GR	7.16	8.69
	CZ	5.79	9.00
	SE	11.52	9.04
	ES	8.31	9.29
	BG	4.34	9.29
	PT	9.79	12.57
	ENC	SRB	4.33
BiH		5.14	10.76

Figure 5, Page 12: POTP electricity break-down of the incumbents' standard offers for households in capital cities – November–December 2015 (%)

Source: ACER Retail Database (2016) and NRAs.

MS	Energy	N Distribution	N Transmission	RES	Energy taxes & charges	Other taxes & charges	VAT	POTP
€443 MT	78%	17%					5%	€ 443
€762 GB	57%	25%		13%			5%	€ 762
€604 CY	55%	26%		3%		1%	16%	€ 604
€638 GR	53%	16%		14%		6%	12%	€ 638
€849 IE	52%	23%	6%	4%	3%		12%	€ 849
€418 BG	51%	19%	4%	10%			17%	€ 418
€440 HR	43%	24%	9%	4%			20%	€ 440
€531 PL	42%	35%		5%			19%	€ 531
€431 LT	42%	23%	4%		13%		17%	€ 431
€424 HU	42%	32%	5%				21%	€ 424
€508 FI	40%	23%	2%	3%	12%		19%	€ 508
€779 ES	40%	22%	4%	16%		1%	17%	€ 779
€524 EE	38%	31%	5%	6%		3%	17%	€ 524
€619 SI	38%	32%		10%		2%	18%	€ 619
€602 FR	38%	28%		7%	12%		15%	€ 602
€503 CZ	38%	32%		13%	1%		17%	€ 503
€779 IT	37%	17%	3%	21%	12%		9%	€ 779
€674 LU	37%	39%		15%		1%	7%	€ 674
€693 NL	37%	29%		2%	15%		17%	€ 693
€445 RO	34%	37%		6%	3%		19%	€ 445
€488 SK	34%	26%		21%	2%		17%	€ 488
€592 LV	33%	33%		16%			17%	€ 592
€774 BE	33%	25%	5%	4%	2%	14%	17%	€ 774
€709 AT	33%	27%		12%	11%		17%	€ 709
€846 PT	29%	26%		23%		4%	18%	€ 846
€1052 DE	28%	22%		21%	7%	7%	16%	€ 1,052
€547 SE	24%	34%		2%	20%		20%	€ 547
€453 NO	14%	53%		2%	11%		20%	€ 453
€1101 DK	13%	16%	3%	13%	35%		20%	€ 1,101

Figure 6, Page 13: POTP gas break-down of incumbents' standard offers for households in capital cities – November–December 2015 (%)

Source: ACER Retail Database (2016) and information from NRAs (2016).

MS	Energy	N Distribution	N Transmission	Energy taxes & charges	Other taxes & charges	VAT	Total POTP
€625 GR	78%			11%		11%	€ 625
€753 GB	71%	22%			2%	5%	€ 753
€474 EE	67%	5%	4%		7%	17%	€ 474
€649 CZ	65%	18%				17%	€ 649
€654 LU	62%	29%			2%	7%	€ 654
€357 BG	61%	19%	3%			17%	€ 357
€503 PL	61%	21%				19%	€ 503
€506 HR	58%	17%	5%			20%	€ 502
€365 HU	57%	16%	5%			21%	€ 365
€492 LT	55%	21%	7%			17%	€ 492
€451 LV	54%	25%				21%	€ 451
€560 SK	52%	30%	2%			17%	€ 560
€801 DE	52%	19%		8%	4%	18%	€ 801
€765 IE	52%	32%			5%	11%	€ 765
€350 RO	50%	31%				19%	€ 350
€649 BE	49%	29%		3%	2%	17%	€ 649
€858 AT	45%	26%			12%	17%	€ 858
€751 SI	45%	28%		9%		18%	€ 751
€1152 FI	43%	22%		16%		19%	€ 1,152
€822 NL	42%	16%		24%		17%	€ 822
€802 FR	40%	28%	11%		8%	13%	€ 802
€925 IT	39%	22%	4%	20%		14%	€ 925
€758 ES	38%	41%			3%	17%	€ 758
€1065 PT	34%	38%		2%	7%	19%	€ 1,065
€1370 SE	32%	27%			27%	15%	€ 1,370
€828 DK	28%	15%		38%		20%	€ 828

Figure 7, Page 15: POTP electricity and gas break-down of the incumbents' standard offers for households in capital cities of the EU – 2012–2015 (% and euro cents/kWh)

Source: ACER Retail Database (2016) and NRAs.

Electricity				
Year	2012	2013	2014	2015
Energy	41%	38%	38%	37%
Network	27%	28%	27%	26%
VAT	15%	15%	14%	15%
Other taxes	11%	10%	9%	10%
RES charges	6%	9%	11%	13%
POTP (euro cents/kWh)	19.57	19.80	20.04	19.94

Gas				
Year	2012	2013	2014	2015
Energy	56%	55%	53%	52%
Network	22%	23%	24%	25%
VAT	12%	12%	12%	13%
Other taxes	9%	10%	11%	9%
POTP (euro cents/kWh)	7.12	6.68	7.01	6.66

Figure 8, Page 16: The year-on-year change in the electricity energy component, non-contestable part and the POTPs for households – selection of countries in Europe – 2014–2015 (%)

Source: ACER Retail Database (2016) and NRAs.

MS	Energy component 2014-2015	Non-contestable charges 2014-2015	POTP 2014-2015
NO	-32%	-3%	-10%
CY	-32%	-10%	-23%
SI	-21%	1%	-8%
SK	-19%	-2%	-9%
DK	-18%	3%	0%
ES	-15%	-2%	-8%
SE	-12%	-9%	-10%
IT	-12%	7%	-1%
HR	-11%	-5%	-7%
FR	-8%	11%	4%
BE	-8%	21%	10%
PT	-5%	7%	3%
AT	-4%	5%	2%
NL	-4%	2%	0%
DE	-4%	-1%	-1%
LU	-3%	13%	6%
GB	-3%	5%	0%
GR	0%	0%	0%
FI	2%	-1%	0%
CZ	2%	0%	1%
MT	2%	0%	2%
PL	2%	12%	8%
LT	3%	-13%	-7%
HU	4%	-3%	-1%
RO	11%	-2%	2%
IE	11%	-18%	-3%
EE	11%	3%	6%

Figure 9, Page 17: Expenditure on RES in relation to energy charges for electricity – 2015

Source: ACER Retail Database (2016) and CEER National Indicators Database (2016).

MS	Ratio of RES and the energy component (%)	Energy charges (euro cents/kWh)	Euros spent on RES (million euros)
AT	37%	€ 6.61	€ 319
BE	12%	€ 7.23	€ 136
BG	19%	€ 6.07	€ 122
CY	5%	€ 9.42	€ 7
CZ	34%	€ 5.39	€ 258
DE	73%	€ 8.41	€ 7,416
DK	105%	€ 3.95	€ 406
EE	15%	€ 5.75	€ 16
ES	41%	€ 8.83	€ 2,580
FI	8%	€ 5.77	€ 101
FR	19%	€ 6.46	€ 1,806
GB	22%	€ 12.45	€ 2,996
GR	27%	€ 9.59	€ 451
HR	9%	€ 5.37	€ 27
IE	8%	€ 12.69	€ 51
IT	56%	€ 8.35	€ 2,705
LU	41%	€ 7.22	€ 27
LV	47%	€ 5.65	€ 46
MT	0%	€ 9.87	€ 0
NL	5%	€ 7.28	€ 94
NO	11%	€ 1.86	€ 81
PL	11%	€ 6.39	€ 219
PT	79%	€ 6.98	€ 999
RO	18%	€ 4.37	€ 93
SE	7%	€ 3.72	€ 107
SI	26%	€ 6.71	€ 56
SK	63%	€ 4.70	€ 146

Figure 10, Page 17: The year-on-year change in the gas energy component, non-contestable component and the POTPs for households – selection of countries in Europe – 2014–2015 (%)
Source: ACER Retail Database (2016) and NRAs.

MS	Contestable charges 14-15	Non-contestable charges 14-15	POTP 14-15
HU	-29%	-24%	-27%
HR	-25%	12%	-14%
GR	-24%	-11%	-21%
DK	-21%	-8%	-12%
FR	-21%	1%	-9%
BE	-21%	-1%	-12%
ES	-18%	-11%	-14%
CZ	-14%	5%	-8%
EE	-14%	2%	-9%
SI	-13%	4%	-5%
LU	-11%	21%	-1%
IT	-9%	3%	-2%
NL	-8%	-2%	-5%
GB	-7%	-19%	-11%
PT	-6%	-1%	-3%
PL	-5%	-21%	-12%
AT	-5%	-1%	-3%
SK	-4%	-1%	-3%
SE	-3%	4%	1%
LT	-3%	11%	3%
DE	-1%	-2%	-1%
LV	1%	-9%	-3%
IE	3%	-15%	-6%
RO	10%	-11%	-2%

Figure 11, Page 20: Overview of the selection of differentiating elements in electricity and gas offers in EU MSs – 2013–2015 (in absolute numbers)

Source: ACER Retail Database (2016).

Electricity				
Year	Additional services	Green offers	Spot-based offers	Number of offers
2015	132	1165	326	2433
2014	121	697	162	2026
2013	69	635	105	1591

Gas				
Year	Additional services	Green offers	Spot-based offers	Number of offers
2015	88	186	24	896
2014	84	178	16	723
2013	43	87	0	625

Figure 12, Page 21: Overview of the selection of differentiating elements in electricity and gas offers depending on the number of years since market liberalisation in Europe – 2013–2015

Source: ACER Retail Database (2016).

Electricity								
	Group I		Group II			Group III		
Number of countries	3		17			9		
Years since liberalisation	≤5		5≤10			>10		
Year	2015	2013	2015	2014	2013	2015	2014	2013
Average number of offers	1	1	33	23	20	191	181	127
Average number of offers per supplier	1.0	1.0	2.7		2.0	3.4		2.8
Percentage of spot-based offers	0%	0%	3%	0%	0%	10%	8%	7%
Percentage of green offers	0%	0%	15%	20%	17%	46%	37%	33%
Percentage of offers with additional services	0%	0%	9%	7%	2%	7%	8%	10%
Average switching rates	0.0%	0.0%	4.6%	5.3%	4.4%	9.9%	9.6%	9.8%

Gas								
	Group I		Group II			Group III		
Number of countries	4		15			7		
Years since liberalisation	≤5		5≤10			>10		
Year	2015	2013	2015	2014	2013	2015	2014	2013
Average number of offers	4	3	21	14	10	73	63	59
Average number of offers per supplier	1.4	1.3	1.9	1.7	1.6	2.9	2.6	2.7
Percentage of spot-based offers	0%	0%	1%	1%	0%	4%	2%	0%
Percentage of green offers	0%	0%	7%	3%	5%	19%	20%	6%
Percentage of offers with additional services	5%	0%	7%	2%	0%	21%	20%	11%
Average switching rates	6.0%	0.0%	5.2%	4.4%	4.9%	9.5%	10.4%	8.8%

Figure 15, Page 30: Underlying barriers to dynamic pricing in electricity supply and network tariffs to household consumers in a selection of EU MSs, ranked by average of all respondents – 2015 (1 = not at all important, 10 = very important)

Source: ACER Questionnaire on dynamic pricing (2016).

Category	Barrier	Score
Supply of electricity	Unawareness of consumers benefits	7.0
	Insufficient savings to be made as perceived by consumers	6.7
	No policy in support of DP	5.8
	Consumers' preference for fixed contracts	5.7
	Complex cost recording and billing	5.6
	No 'enabling technology'	5.4
	Unavailability of energy services or innovative solutions	5.3
	Insufficient savings to be made	5.2
Electricity network tariffs	Too low potential for demand response	7.0
	Considerations with regards to redistribution effect against a consumer segment	6.5
	Complex cost recording and billing	6.3
	Consumer protection standards	6.2
	Risks of not recovering all the incurred costs of the system	6.2
	Lack of uniform processes	5.2

Figure 16, Page 31: Underlying barriers to dynamic pricing in gas supply and network tariffs for household consumers in Europe, 2015
Source: ACER Questionnaire on dynamic pricing (2016).

Category	Barrier	Score
Supply of gas	Unawareness of consumers benefits	7.6
	No 'enabling technology'	7.4
	No policy in support of DP	6.5
	Insufficient savings to be made as perceived by consumers	6.2
	Unavailability of innovative solutions	6.2
	Complex cost recording and billing	6.1
	Consumers' preference for fixed contracts	5.7
Gas network tariffs	Risks of not recovering all the incurred costs of the system	8.4
	Too low of a potential for demand response	8.1
	Discriminatory, untimely and non-transparent access to data	6.4
	Complex cost recording and billing	5.9
	Consumer protection standards	5.3

Figure 17, Page 34: ARCI indicator for retail electricity and gas markets for household consumers in EU MSs and Norway – 2015
Source: ACER Retail Database (2016), CEER National Indicators Database (2016), DG Justice and Consumers (2014 and 2016) and ACER calculations.

Electricity											
MS	CR3	Suppliers with market share >5%	Ability to compare price easily	Average net entry (2013-2015)	Switching rates (supplier + tariff) (average 2011-2015)	% of consumers who have not switched	Number offers per supplier	Does the market meet expectations	Mark-up (average 2013-2015)	ARCI score (2014)	ARCI score (2015)
AT	0.7	1.0	1.0	1.1	0.2		0.6	1.0	0.4	5.5	6.1
BE	0.4	0.9	0.7	0.2	0.9	0.6	0.6	0.9	0.4	5.6	5.7
BG	0.0	0.6	0.6	0.0	0.0	0.0	0.3	0.7		2.0	2.3
HR	0.0	0.2	0.7	0.0	0.1	0.1	0.6	0.9		2.2	2.6
CY	0.0	0.2	1.0	0.0		0.0	0.3	1.1		2.0	2.6
CZ	0.3	0.9	0.8	1.1	0.5	0.3	0.4	0.8	1.1	5.6	6.3
DK	1.0	1.3	0.6	0.5	0.4		0.8	1.1	0.2	5.0	5.8
EE	0.3	0.4	0.9	0.0	0.8		1.0	1.0	1.0	5.2	5.5
FI	1.1	0.8	0.9	1.0	0.9		1.3	1.1	0.8	7.4	7.8
FR	0.0	0.4	0.9	0.2	0.4	0.1	0.4	0.9	0.1	3.3	3.4
DE	1.0	0.7	0.9	1.1	0.7	0.3	0.6	0.9	0.1	5.7	6.3
GB	0.7	1.1	0.7	0.9	1.0	0.7	0.7	0.9	0.0	6.2	6.8
EL	0.0	0.2	0.7	0.1	0.1	0.0	0.3	0.8	0.0	3.1	2.1
HU	0.5	0.4	0.9	0.1		0.0	0.3	1.1	0.0	3.9	3.3
IE	0.2	0.8	0.9	0.1	1.1		0.8	1.1	0.1	4.8	5.2
IT	0.3	0.2	0.8	1.0	0.7		0.6	1.0	0.8	4.7	5.3
LV	0.0	0.2	0.7	0.2	0.2	0.0	0.9	0.8	1.1	2.1	4.1
LT	0.0	0.2	0.8	0.1	0.4	0.0	0.6	0.9	0.0	2.9	2.9
LU	0.0	0.4	1.0	0.0	0.1		1.0	1.0	0.4	3.7	4.1
MT	0.0	0.3	1.2	0.0			0.3	1.3		2.2	3.2
NL	0.4	0.6	0.8	1.0	1.1		0.9	1.0	0.5	6.4	6.3
NO	1.0	0.7	0.7	0.0	0.9	0.3	1.1	0.8	0.7	6.3	6.3

PL	0.4	0.9	0.6	1.1	0.3	0.0	1.1	0.8	0.0	5.1	5.3
PT	0.1	0.4	0.7	0.4	1.1	0.7	0.7	0.8	0.6	5.0	5.7
RO	0.2	0.7	0.8	1.1	0.3	0.0	0.4	0.9	0.0	4.1	4.5
SK	0.2	0.6	0.8	0.0	0.4	0.1	0.2	1.0	0.0	4.1	3.3
SI	0.5	1.1	0.8	0.2	0.3	0.2	0.2	0.9	0.7	5.0	5.0
ES	0.2	0.6	0.5	0.7	0.9	0.2	0.4	0.6	0.6	4.6	4.7
SE	1.1	1.0	0.8		1.2		1.3	1.2	0.8	7.4	7.4

Gas											
MS	CR3	Suppliers with market share >5%	Ability to compare price easily	Average net entry (2013-2015)	Switching rates (supplier + tariff) (average 2011-2015)	% of consumers who have not switched	Number offers per supplier	Does the market meet expectations	Mark-up (average 2013-2015)	ARCI score (2014)	ARCI score (2015)
AT	0.5	0.6	1.0	0.5	0.3		0.6	1.0	0.5	4.4	4.9
BE	0.4	0.9	0.7	0.7	1.0	0.8	0.6	0.9	0.5	5.8	6.6
BG	0.0	0.4	0.8	0.0	0.2	0.0	0.2	0.8	0.0	2.5	2.4
HR	0.6	0.6	0.7	0.0	0.1	0.0	0.2	0.8	0.0	2.8	3.0
CZ	0.4	0.9	0.8	1.1	0.7	0.5	0.5	0.8	0.5	6.3	6.1
DK	0.1	0.6	0.6	0.1	0.6	0.1	0.9	0.9	0.3	4.8	4.1
EE	0.1	0.2	1.0	0.4	0.6		0.3	1.1	1.2	4.5	4.8
FR	0.1	0.4	0.9	0.1	0.6	0.3	0.5	0.9	0.3	3.8	4.1
DE	1.1	0.6	0.9	1.1	0.8	0.3	0.6	0.9	0.4	5.3	6.7
GB	0.6	1.1	0.7	1.0	0.9	1.1	0.6	0.9	0.0	6.4	6.8
EL	0.0	0.2	0.8	0.0	0.2	0.0	0.2	0.8	0.0	2.2	2.2
HU	0.3	0.8	0.9	0.0		0.0	0.3	1.1	0.0	2.9	3.4
IE	0.2	0.9	0.8	0.1	1.1	0.8	0.7	0.9	0.5	5.0	5.8
IT	0.8	0.8	0.8	0.9	0.5		0.6	0.9	0.7	5.5	6.1
LV	0.0	0.2	0.8	0.0	0.1	0.0	0.2	0.9	0.0	2.0	2.2
LT	0.0	0.2	1.0	0.0	0.0	0.0	0.2	1.0	0.0	2.3	2.4
LU	0.0	0.4	0.9	0.0	0.1	0.0	1.0	0.9	0.3	3.3	3.6
NL	0.4	0.6	0.8	1.3	1.1		0.8	1.0	0.6	6.4	6.5
PL	0.0	0.2	0.7	0.6	0.1	0.0	0.2	0.9	0.0	2.5	2.7
PT	0.0	0.6	0.9	0.2	1.1	1.1	0.6	0.9	0.7	5.0	6.1
RO	0.1	0.4	0.9	0.4		0.0	0.3	1.0	0.0	2.8	3.1
SK	0.1	0.6	0.8	0.2	0.5	0.4	0.2	1.0	0.0	3.7	3.7
SI	0.6	1.0	1.0	0.4	0.4		0.3	1.1	0.9	6.4	5.7
ES	0.2	0.7	0.6	0.3	1.0	0.6	0.9	0.8	0.7	6.2	5.9

Figure 18, Page 35: Market share of the three largest suppliers (CR3), number of main suppliers and number of nationwide active suppliers in retail electricity and gas markets for households – 2015 (%)
Source: CEER National Indicators Database (2016).

Electricity			
MS	CR3 (%)	Main suppliers (number)	Nationwide active suppliers (number)
AT	60	5	34
BE	75	5	15
BG	100	3	4
CY	100	1	1
CZ	78	5	52
DE	40	4	99
DK	45	6	29
EE	85	2	23
ES	90	3	36
FI	40	4	51
FR	99	2	12
GB	54	6	35
GR	100	1	8
HR	99	1	8
HU	73	2	11
IE	90	4	7
IT	84	1	30
LT	100	1	3
LU	98	2	5
LV	98	1	10
MT	100	1	1
NL	78	3	53
NO	38	4	70
PL	77	5	29
PT	91	2	13
RO	84	4	32
SE	44	4	68
SI	66	7	13
SK	87	3	19

Gas			
MS	CR3 (%)	Main suppliers (number)	Nationwide active suppliers (number)
AT	75	3	18
BE	72	5	23
BG	100	2	25
CZ	75	5	72
DE	22	3	75
DK	93	3	13
EE	92	1	8
ES	88	4	33

FR	92	2	9
GB	63	6	37
GR	100	1	1
HR	62	3	44
HU	83	4	1
IE	88	5	5
IT	53	4	25
LT	100	1	1
LU	100	2	2
LV	100	1	1
NL	76	3	55
PL	100	1	17
PT	100	3	9
RO	92	2	50
SE	85	4	0
SI	67	5	12
SK	94	3	15

Figure 19, Page 36: Relationship between 'external' switching rates and annual savings available in capital cities of EU MSs and Norway – 2015 (% , euros)

Source: ACER Retail Database (2016) and CEER National Indicators Database (2016).

Electricity		
MS	Potential savings (€/year)	Switching rates (%)
AT	€ 164	2.3
BE	€ 84	12.2
HR	€ 39	2.3
CZ	€ 88	3.6
DK	€ 72	3.7
EE	€ 41	2.0
FI	€ 107	12.5
FR	€ 32	4.3
DE	€ 389	8.7
GB	€ 206	12.2
GR	€ 43	0.3
IE	€ 124	14.0
IT	€ 74	8.0
LV	€ 226	0.0
LT	€ 17	0.0
LU	€ 32	0.1
NL	€ 130	15.1
NO	€ 85	13.7
PL	€ 235	0.9
PT	€ 72	26.6
SK	€ 14	2.7
SI	€ 39	6.7
ES	€ 72	10.7
SE	€ 29	10.3

Gas		
MS	Potential savings (€/year)	Switching rates (%)
AT	€ 227	3.4
BE	€ 221	15.8
CZ	€ 187	5.9
DK	€ 0	10.1
EE	€ 0	5.9
FR	€ 68	9.4
DE	€ 316	9.2
GB	€ 296	12.7
IE	€ 121	15.1
IT	€ 101	6.1
LU	€ 293	0.0
NL	€ 178	15.1
PL	€ 39	0.4
PT	€ 75	23.8
SK	€ 9	3.2
SI	€ 70	6.0
ES	€ 36	11.1
SE	€ 327	0.2

Figure 20, Page 37: Relationship between the level of competition in retail energy markets and time since market liberalisation in EU MSs and Norway – 2015 (ARCI score, years)
Source: ACER Retail Database (2016), CEER National Indicators Database (2016), DG Justice and Consumers (2014 and 2016) and ACER calculations.

Electricity		
MS	ARCI Score	Years since market liberalisation (electricity)
AT	6.1	14
BE	5.7	8
BG	2.3	0
HR	2.6	7
CY	2.6	0
CZ	6.3	9
DK	5.8	12
EE	5.5	6
FI	7.8	18
FR	3.4	8
DE	6.3	17
GB	6.8	16
GR	2.1	8
HU	3.3	8
IE	5.2	10
IT	5.3	8
LV	4.1	8
LT	2.9	7
LU	4.1	8
MT	3.2	0
NL	6.3	11
NO	6.3	20
PL	5.3	8
PT	5.6	9
RO	4.5	8
SK	3.3	8
SI	5.0	8
ES	4.7	12
SE	7.4	19

Gas		
MS	ARCI Score	Years since market liberalisation
AT	4.9	13
BE	6.6	8
BG	2.4	0
HR	3.0	7
CZ	6.1	8
DK	4.1	11
EE	4.8	8
FR	4.1	8
DE	6.7	17
GB	6.9	17
GR	2.2	0
HU	3.4	8
IE	5.8	8
IT	6.1	12
LV	2.2	1
LT	2.4	8
LU	3.6	8
NL	6.5	11
PL	2.7	8
PT	6.1	5
RO	3.0	8
SK	3.7	8
SI	5.6	8
ES	5.9	12

Figure 21, Page 43: Average annual mark-ups in retail electricity (2008–2015) and gas (2012–2015) markets for household consumers in EU MSs and Norway and annual mark-ups – Source: ACER Retail Database (2016), Eurostat (26 August 2016), NRAs, European power exchanges data (2016) and ACER calculations.

Electricity		
MS	2008-2015 average mark-up (euros/MWh)	2015 mark-up (euros/MWh)
GB	36.86	55.06
IE	32.58	39.46
DE	28.64	37.14
NL	22.03	24.61
SK	21.78	27.21
LU	20.16	26.60
BE	19.85	36.67
AT	19.08	27.69
GR	18.50	38.13
SE	15.16	18.30
SI	12.59	13.37
EU average	12.15	18.42
PL	11.59	14.77
FI	11.06	11.39
IT	10.76	20.68
NO	10.08	10.96
ES	9.87	-2.94
DK	9.46	3.48
FR	9.15	15.70
PT	8.33	6.42
HU	3.48	3.67
EE	2.77	10.40
LT	-0.60	4.38
CZ	-5.31	1.23
RO	-9.96	2.34
LV	-14.22	7.98

Gas		
MS	2008-2015 average mark-up (euros/MWh)	2015 mark-up (euros/MWh)
GR	20.54	22.33
GB	19.89	27.22
LU	17.64	14.39
DE	13.64	16.58
BE	12.61	7.68
AT	12.03	13.72
NL	11.72	10.61
SE	11.16	13.65
IE	11.05	13.62
FR	9.20	7.85
IT	8.52	9.59
CZ	8.52	16.80
EU average	6.98	7.86
HR	5.26	3.26
ES	4.26	4.45
RO	4.00	3.14
SI	3.41	7.63
PT	3.09	9.47
DK	1.99	-0.09
EE	1.51	1.78
SK	1.19	4.95
PL	0.54	4.29
LT	-0.27	-3.34
BG	-1.03	-5.93
LV	-2.64	-2.59
HU	-3.37	-4.55

Figure 22, Page 45: Three-year (2013–2015) average change between wholesale prices and the retail energy component for household consumers in electricity and gas markets in EU MSs and Norway (euros/MWh)

Source: ACER Retail Database (2016), Eurostat (26 August 2016), NRAs, European power exchanges data (2016) and ACER calculations.

Electricity (2013-2015 average)					
Quadrant	Description	Number of MSs	MSs	Average retail energy component change (euros/MWh)	Average wholesale price change (euros/MWh)
I	Both the wholesale price and the retail energy component increased	0	-	-	-
II	The wholesale price decreased and the retail energy component increased	6	BE, FR, GB, GR, LT, RO	4.30 euros/MWh	-2.52 euros/MWh
III	Both the wholesale price and the retail energy component decreased	18	AT, CZ, DE, DK, EE, ES, FI, HU, IE, IT, LU, NL, NO, PL, PT, SE, SI, SK	-3.89 euros/MWh	-4.52 euros/MWh
IV	The wholesale price increased and the retail energy component decreased	0	-	-	-

Gas (2013-2015 Average)					
Quadrant	Description	Number of MSs	MSs	Average Retail Energy Component Change (euros/MWh)	Wholesale Price Change (euros/MWh)
I	Both the wholesale price and the retail energy component increased	0	-	-	-
II	The wholesale price decreased and the retail energy component increased	3	CZ, GB, PT	1.19 euros/MWh	-2.58 euros/MWh
III	Both the wholesale price and the retail energy component decreased	20	AT, BE, HR, CZ, DK, EE, ES, FI, GB, HU, IT, LT, LU, NL, NO, PL, PT, SI, SK	-3.00 euros/MWh	-2.85 euros/MWh
IV	The wholesale price increased and the retail energy component decreased	1	RO	-0.55 euros/MWh	0.83 euros/MWh

Figure 24, Page 50: Average ARCI score for retail electricity and gas markets for household consumers in countries with and without end-user price regulation in EU MSs and Norway – 2015

Source: ACER Retail Database (2016), CEER National Indicators Database (2016), DG Justice and Consumers (2014 and 2016) and ACER calculations.

Electricity									
Group	CR3	Number of suppliers with market share >5%	Average net entry	Switching rates (supplier + tariff)	% of consumers who have not switched	Ability to compare price easily	Number of offers per supplier	Does the market meet expectations	Mark-up (average 2013-2015)
Countries without regulated prices	0.48	0.67	0.50	0.64	0.30	0.81	0.76	0.94	0.57
Countries with regulated prices for less than 95% of household customers	0.33	0.64	0.44	0.70	0.36	0.68	0.58	0.87	0.36
Countries with regulated prices for more than 95% of household customers	0.16	0.50	0.29	0.29	0.03	0.85	0.43	0.97	0.01

Gas									
Group	CR3	Suppliers with market share >5%	Average net entry	Switching rates (supplier + tariff)	Percentage of consumers who have not switched	Ability to compare price easily	Number of offers per supplier	Does the market meet expectations	Mark-up (average 2013-2015)
Countries without regulated prices	0.47	0.74	0.66	0.66	0.57	0.86	0.57	0.95	0.54
Countries with regulated prices for less than 95% of household customers	0.11	0.56	0.16	0.82	0.54	0.74	0.74	0.89	0.48
Countries with regulated prices for more than 95% of households	0.13	0.39	0.12	0.15	0.04	0.83	0.23	0.92	0.00

Figure 25, Page 55: Average annual change in typical household energy consumption per EU MSs – 2011–2015 (%)

Source: CEER National Indicators Database (2016).

MS	CAGR Electricity (%)	CAGR Gas (%)
BE	-3.8%	-10.9%
GR	0.0%	-8.8%
PT	0.0%	-6.7%
GB	-1.6%	-6.7%
NL	0.5%	-5.8%
HU	-0.5%	-5.6%
LT	0.2%	-5.3%
IT	-1.5%	-4.3%
HR	-2.3%	-3.6%
RO	0.0%	-3.0%
IE	-1.7%	-3.0%
CZ	0.6%	-2.6%
ES	-5.6%	-1.0%
AT	-1.1%	-0.2%
BG	0.0%	0.0%
DE	-0.9%	0.0%
DK	0.0%	0.0%
EE	0.0%	0.0%
FR	0.0%	0.0%
LV	-0.5%	0.0%
CY	-5.7%	0.0%
MT	0.0%	0.0%
NO	-1.6%	0.0%
SI	-0.4%	0.6%
SK	-0.8%	1.2%
FI	-1.2%	2.5%
LU	-2.0%	7.7%
SE	0.0%	35.1%

Figure 26, Page 55: Electricity POTP and PTP for household and industrial consumers – Europe and EnC countries – 2015 (euro cents/kWh)
Source: Eurostat (26 April 2016) and ACER calculations.

	Country	PTP (euro cents/kWh)	VAT and Recoverable taxes (euro cents/kWh)	Other taxes (euro cents/kWh)
Prices for electricity household consumers	BG	7.92	1.58	0.00
	LT	8.69	2.17	1.64
	HU	8.95	2.42	0.00
	RO	9.33	2.54	1.25
	EE	9.51	2.12	1.34
	DK	9.66	6.12	14.78
	HR	10.06	2.63	0.46
	FI	10.18	2.98	2.26
	CZ	10.49	2.24	0.11
	NO	10.64	3.05	1.56
	FR	10.87	2.44	3.19
	LV	10.90	2.85	2.68
	PL	11.15	2.68	0.49
	SI	11.25	2.91	1.95
	PT	11.52	4.24	7.07
	SE	11.93	3.73	2.98
	MT	12.02	0.60	0.00
	GR	12.19	2.04	3.47
	SK	12.28	2.52	0.32
	NL	12.45	3.29	3.22
	AT	12.50	3.33	4.13
	LU	13.31	1.31	3.05
	EU28	14.01	2.89	3.88
	DE	14.29	4.71	10.49
	IT	14.93	2.22	7.24
	CY	15.19	2.95	0.84
	BE	18.30	2.06	2.04
	ES	18.40	4.06	0.94
	IE	19.81	2.91	1.69
	UK	20.52	1.03	0.00
	KO	4.82	0.80	0.58
	SRB	4.86	1.01	0.24
AL	6.80	1.36	0.00	
BiH	6.94	1.18	0.00	
FYROM	7.04	1.27	0.00	
MO	8.50	0.00	0.00	
MNG	8.72	1.60	0.00	

Price for electricity industrial consumers	NO	3.18	1.19	1.56
	SE	4.58	1.16	0.05
	FI	4.61	1.28	0.71
	DK	4.76	16.72	2.95
	LU	5.01	0.43	0.46
	RO	5.30	1.53	1.18
	AT	5.60	1.56	2.15
	SI	5.66	1.43	0.85
	BG	5.88	1.20	0.10
	FR	5.99	1.48	1.52
	EE	6.06	1.47	1.30
	DE	6.17	3.95	5.01
	HR	6.18	1.62	0.29
	GR	6.25	0.95	1.04
	NL	6.28	1.40	0.41
	PL	6.46	1.60	0.49
	BE	6.53	1.53	1.19
	LT	6.72	1.78	1.68
	EU28	7.08	2.26	2.25
	LV	7.19	2.07	2.68
	CZ	7.33	1.56	0.11
	PT	7.44	2.03	1.37
	HU	7.56	2.07	0.87
	IT	7.66	1.18	5.00
	ES	7.83	1.73	0.41
	IE	9.29	0.92	0.58
	SK	9.31	1.95	0.45
	CY	11.17	2.18	0.85
	MT	11.74	0.58	0.00
	UK	13.19	2.69	0.29
	KO	4.44	0.74	0.58
	BiH	4.47	0.77	0.00
MNG	5.10	0.99	0.00	
SRB	5.45	1.14	0.26	
FYROM	6.05	1.09	0.00	

Figure 27, Page 56: Gas POTP and PTP for household and industrial consumers – Europe and EnC countries – 2015 (euro cents/kWh)
Source: Eurostat (26 April 2016) and ACER calculations.

	Country	PTP (euro cents/KWh)	VAT and recoverable taxes (euro cents/KWh)	Other taxes (euro cents/KWh)
Prices for gas household consumers	RO	1.65	0.63	0.98
	HU	2.78	0.75	0.00
	EE	3.23	0.70	0.28
	DK	3.42	1.57	2.85
	LT	3.55	0.75	0.00
	BG	3.62	0.72	0.00
	HR	3.73	0.93	0.00
	LV	3.88	0.85	0.18
	PL	4.06	0.94	0.00
	SK	4.13	0.83	0.00
	LU	4.25	0.41	0.24
	NL	4.32	1.33	2.04
	SI	4.44	1.12	0.63
	CZ	4.78	1.01	0.00
	BE	4.78	1.04	0.21
	DE	5.11	1.08	0.60
	EU28	5.14	0.88	0.62
	AT	5.31	1.21	0.69
	IT	5.44	1.30	1.62
	FR	5.71	1.04	0.43
	GR	5.75	0.82	0.59
	IE	5.78	0.83	0.37
	UK	6.21	0.31	0.00
	SE	6.28	2.31	2.94
	ES	6.64	1.45	0.23
	PT	7.56	1.84	0.40
	MD	2.96	0.22	0.00
	SRB	3.94	0.39	0.00
	BiH	4.07	0.74	0.33

Prices for gas industrial consumers	RO	1.75	0.55	0.54
	LT	1.94	0.41	0.00
	BE	2.05	0.31	0.05
	AT	2.36	0.93	1.03
	DE	2.38	0.53	0.40
	BG	2.40	0.49	0.05
	DK	2.40	3.81	0.35
	UK	2.40	0.50	0.05
	CZ	2.41	0.53	0.12
	NL	2.42	0.54	0.15
	FR	2.44	0.26	0.07
	PL	2.52	0.59	0.00
	EU28	2.57	0.52	0.21
	IT	2.65	0.19	0.04
	FI	2.65	0.97	1.39
	HU	2.70	0.77	0.17
	LV	2.71	0.61	0.17
	EE	2.77	0.59	0.17
	ES	2.81	0.60	0.06
	SI	2.85	0.69	0.28
	IE	2.87	0.28	0.14
	SK	2.90	0.61	0.14
	GR	2.93	0.45	0.57
	SE	3.01	3.55	0.87
	LU	3.04	0.26	0.02
	PT	3.16	0.73	0.01
	HR	3.19	0.80	0.04
	FYROM	2.46	0.47	0.17
	MD	2.52	0.20	0.00
	SRB	3.67	0.37	0.00
BiH	4.07	0.90	1.25	

Figure 28, Page 56: Electricity POTP and PTP for household and industrial consumers considering purchasing power – Europe and EnC countries – 2015 (euro cents/kWh)

Source: Eurostat (26 April 2016) and ACER calculations.

Category	Country	PTP (euro cents/KWh)	VAT and recoverable taxes (euro cents/KWh)	Other taxes (euro cents/KWh)
Prices for gas household consumers	DK	7.17	4.54	10.97
	NO	7.57	2.17	1.11
	FI	8.19	2.40	1.82
	SE	9.36	2.93	2.34
	FR	9.89	2.21	2.91
	LU	11.13	1.10	2.56
	NL	11.38	3.02	2.94
	AT	11.41	3.04	3.77
	EE	12.93	2.88	1.82
	DE	13.71	4.52	10.07
	EU28	14.01	2.89	3.88
	SI	14.07	3.64	2.44
	LT	14.25	3.56	2.69
	PT	14.79	5.45	9.08
	GR	14.81	2.47	4.21
	IT	14.86	2.21	7.21
	MT	14.97	0.75	0.00
	UK	15.85	0.79	0.00
	HU	15.86	4.29	0.00
	HR	15.87	4.15	0.72
	LV	16.02	4.19	3.94
	CZ	16.30	3.48	0.18
	BE	16.53	1.87	1.84
	BG	16.96	3.39	0.00
	CY	16.99	3.30	0.94
	IE	17.79	2.61	1.52
	RO	18.44	5.02	2.47
	SK	18.49	3.79	0.48
	PL	19.33	4.64	0.84
	ES	20.56	4.54	1.05
	SRB	10.61	2.23	0.52
	BiH	14.37	2.43	0.00
AL	15.84	3.17	0.00	
FYROM	17.22	3.11	0.00	
MNG	17.27	3.16		

Prices for gas - industrial consumers

NO	2.27	0.85	1.11
DK	3.53	12.39	2.19
SE	3.60	0.91	0.04
FI	3.71	1.03	0.57
LU	4.19	0.37	0.38
AT	5.12	1.42	1.96
FR	5.45	1.35	1.38
NL	5.74	1.28	0.37
BE	5.90	1.38	1.08
DE	5.92	3.79	4.80
SI	7.07	1.79	1.08
EU28	7.08	2.26	2.25
GR	7.54	1.15	1.25
IT	7.62	1.18	4.98
EE	8.24	1.99	1.76
IE	8.34	0.82	0.52
ES	8.75	1.94	0.45
PT	9.55	2.61	1.76
HR	9.75	2.56	0.46
UK	10.20	2.08	0.22
RO	10.47	3.01	2.33
LV	10.57	3.04	3.94
LT	11.02	2.92	2.76
PL	11.20	2.77	0.83
CZ	11.40	2.43	0.16
CY	12.48	2.43	0.95
BG	12.60	2.56	0.22
HU	13.40	3.67	1.56
SK	14.03	2.94	0.68
MT	14.63	0.73	0.00
BiH	9.36	1.59	0.00
MNG	10.09	1.96	0.00
SRB	11.92	2.50	0.58
FYROM	14.80	2.67	0.00

Figure 29, Page 61: Gas POTP and PTP for household and industrial consumers considering purchasing power – Europe and EnC countries – 2015 (euro cents/kWh)

Source: Eurostat (26 April 2016) and ACER calculations.

Category	Country	PTP (euro cents/kWh)	VAT and recoverable taxes (euro cents/kWh)	Other taxes (euro cents/KWh)
Prices for gas household consumers	DK	2.54	1.17	2.12
	RO	3.26	1.25	1.94
	LU	3.55	0.35	0.19
	NL	3.95	1.23	1.86
	BE	4.32	0.94	0.19
	EE	4.38	0.95	0.38
	UK	4.80	0.24	0.00
	AT	4.85	1.11	0.63
	DE	4.90	1.04	0.57
	HU	4.92	1.33	0.00
	SE	4.93	1.81	2.30
	EU28	5.14	0.88	0.62
	IE	5.19	0.75	0.34
	FR	5.20	0.95	0.37
	IT	5.41	1.29	1.62
	SI	5.55	1.40	0.80
	LV	5.70	1.25	0.26
	LT	5.82	1.23	0.00
	HR	5.88	1.47	0.00
	SK	6.22	1.25	0.00
	GR	6.99	0.99	0.71
	PL	7.04	1.62	0.00
	ES	7.42	1.61	0.26
	CZ	7.44	1.56	0.00
BG	7.74	1.55	0.00	
PT	9.71	2.35	0.52	
BiH	8.53	1.55	0.69	
SRB	8.59	0.86	0.00	

Prices for gas: industrial consumers	DK	1.78	2.83	0.26
	BE	1.85	0.29	0.05
	UK	1.86	0.38	0.04
	FI	2.13	0.78	1.12
	AT	2.15	0.84	0.94
	NL	2.22	0.50	0.13
	FR	2.22	0.23	0.07
	DE	2.28	0.51	0.39
	SE	2.36	2.78	0.69
	LU	2.54	0.21	0.02
	EU28	2.57	0.52	0.21
	IE	2.57	0.26	0.12
	IT	2.64	0.19	0.05
	ES	3.15	0.68	0.06
	LT	3.18	0.67	0.00
	RO	3.46	1.08	1.06
	GR	3.56	0.55	0.69
	SI	3.57	0.86	0.34
	CZ	3.75	0.83	0.18
	EE	3.76	0.80	0.22
	LV	3.98	0.89	0.25
	PT	4.06	0.93	0.01
	SK	4.37	0.91	0.20
	PL	4.38	1.01	0.00
	HU	4.77	1.36	0.29
	HR	5.04	1.27	0.05
	BG	5.13	1.05	0.11
	FYROM	6.02	1.16	0.41
	SRB	7.98	0.81	0.00
	BiH	8.53	1.89	2.63

Figure 30, Page 57: The compounded annual growth rate (CAGR) of the electricity energy component and non-contestable charges – selection of countries in Europe – 2012–2015
Source: ACER Retail Database (2016) and NRAs.

Component change 2014-2015 (%)			
MS	Energy component (2012-2015)	Non-contestable charges (2012-2015)	POTP (2012-2015)
NO	-0.22	-0.04	-0.08
CY	-0.22	-0.06	-0.16
SK	-0.13	0.00	-0.05
MT	-0.11	-0.03	-0.09
DK	-0.10	0.04	0.02
HU	-0.10	-0.12	-0.11
HR	-0.09	-0.04	-0.07
SI	-0.09	0.06	0.00
IT	-0.09	0.04	-0.02
BE	-0.09	0.00	-0.03
DE	-0.08	0.06	0.01
CZ	-0.08	-0.02	-0.04
AT	-0.06	0.06	0.01
SE	-0.04	-0.04	-0.04
PT	-0.04	0.06	0.03
NL	-0.03	0.04	0.01
FI	-0.02	0.00	-0.01
LU	-0.02	0.06	0.03
ES	-0.01	-0.02	-0.01
PL	0.01	0.05	0.03
LV	0.02	0.05	0.04
FR	0.02	0.06	0.05
GB	0.03	0.08	0.05
IE	0.03	-0.03	0.00
LT	0.03	-0.03	-0.01
GR	0.05	0.09	0.07
RO	0.07	0.04	0.05
EE	0.22	0.02	0.08

Figure 31, Page 58: The year-on-year change in RES charges and POTPs for electricity households – selection of countries in Europe – 2014–2015 (%)

Source: ACER Retail Database (2016) and NRAs.

MS	Change in RES (2014-2015)	Change in POTP (2014-2015)
LV	62%	12%
NL	58%	0%
IE	57%	-3%
LU	48%	6%
PT	45%	3%
DK	34%	0%
SI	26%	-5%
AT	23%	2%
GB	20%	14%
NO	18%	-10%
EE	16%	6%
RO	15%	2%
IT	12%	-1%
CZ	2%	1%
DE	-1%	-1%
FR	-1%	4%

Figure 32, Page 58: The compounded annual growth rate (CAGR) of the gas energy component and non-contestable charges – Europe – 2012–2015 (%)

Source: ACER Retail Database (2016) and NRAs.

	Contestable charges (2012-2015)	Non-contestable charges (2012-2015)	POTP (2012-2015)
HR	-19%	-15%	-18%
BG	-18%	-20%	-19%
LT	-17%	0%	-11%
BE	-16%	-3%	-10%
DK	-15%	-3%	-7%
GR	-13%	-6%	-12%
LU	-12%	10%	-6%
FR	-12%	8%	-2%
HU	-10%	-17%	-13%
IT	-9%	0%	-4%
ES	-8%	-3%	-5%
EE	-7%	-25%	-15%
CZ	-6%	-2%	-4%
NL	-6%	2%	-2%
DE	-5%	2%	-2%
PL	-3%	-12%	-7%
AT	-3%	2%	0%
SE	-3%	2%	0%
SK	-2%	1%	-1%
FI	1%	2%	2%
LV	1%	-4%	-1%
IE	1%	-3%	-1%
GB	3%	0%	2%
RO	4%	3%	3%
PT	4%	7%	6%
SI	6%	15%	10%

Figure 33, Page 6-: Number of electricity and gas offers from price comparison tools in ACER database, capital cities, November-December
Source: ACER Retail Database (2014, 2015, 2016).

Offer	MS	2013	2014	2015
Electricity	DE	376	404	453
	SE	368	378	425
	NO	23	100	319
	FI	204	401	259
	PL	77	133	194
	DK	124	83	120
	GB	20	69	102
	AT	40	53	76
	ES	32	54	68
	NL	71	86	65
	CZ	61	69	64
	IT	29	23	33
	EE	14	40	33
	PT	11	17	33
	LV	1	1	33
	BE	17	19	25
	IE	10	9	23
	FR	22	22	21
	SK	19	23	20
	LU	16	18	20
	HR	7	4	15
	GR	4	6	9
	SI	36	5	7
	LT	1	1	5
HU	4	4	4	
RO	1	1	4	
Gas	DE	278	290	322
	CZ	22	74	158
	GB	27	41	58
	DK	29	42	52
	NL	58	72	51
	AT	15	28	46
	IT	22	23	31
	ES	45	25	25
	SE	16	20	23
	FR	19	21	22
	BE	12	14	19

Gas	SK	20	18	17
	LU	6	9	13
	PL	1	1	13
	IE	7	6	12
	PT	9	10	11
	SI	27	11	10
	HU	4	4	4
	FI	1	1	2

Figure 34, Page 60: Type of energy pricing of electricity-only offers in capital cities as a percentage of all offers – November–December 2015 (%)

Source: ACER Retail Database (2016).

MS (number of offers)	Fixed	Variable	Spot-based	Other/cannot say
LT (5)	80%			20%
IT (33)	79%	21%		
GB (102)	67%	33%		
DE (453)	60%	40%		
BE (25)	60%	40%		
SE (425)	59%		27%	14%
NL (65)	55%	18%		26%
RO (4)	50%			50%
FI (259)	49%	35%	16%	
AT (76)	47%	12%	1%	39%
PL (194)	46%	46%		7%
FR (21)	43%	52%		5%
EE (33)	42%	15%	42%	
HR (15)	40%	53%		7%
DK (120)	40%	46%	14%	
LV (33)	30%	70%		
GR (9)	22%	56%		22%
NO (319)	22%	18%	42%	18%
CZ (64)	22%	6%		72%
IE (23)	17%	83%		
LU (20)	10%	90%		
ES (68)	7%	91%	1%	
PT (33)	3%	12%		85%
SI (7)		100%		
MT (1)		100%		
SK (20)				100%
HU (4)				100%
BG (1)				100%
CY (1)				100%

Figure 35, Page 61: Type of energy pricing of gas-only offers in capital cities as a percentage of all offers – November–December 2015 (%)

Source: ACER Retail Database (2016).

MS (number of offers)	Fixed	Variable	Spot-based	Other/Cannot say
IT (31)	81%	19%		
FR (22)	73%	27%		
DE (322)	70%	30%		
SE (23)	61%	22%	17%	
AT (46)	59%	33%		9%
DK (52)	58%	12%	31%	
GB (58)	53%	47%		
NL (51)	53%	47%		
BE (19)	42%	53%		5%
CZ (158)	42%	58%		1%
IE (12)	25%	75%		
ES (25)	20%	80%		
SK (17)	12%			88%
SI (10)	10%	90%		
LU (13)	0%	100%		
BG (1)				100%
EE (1)				100%
FI (2)				100%
GR (1)				100%
HR (1)				100%
HU (1)				100%
LT (1)				100%
LV (1)				100%
PL (13)				100%
PT (10)				100%
RO (1)				100%

Figure 36, Page 64: CR3 in the retail electricity and gas markets for household consumers in EU MSs and Norway by metering points and absolute six-year change – 2015 and 2009–2015 (%)

Source: CEER National Indicators Database (2016) and ACER calculations.

MS	Electricity (2015)	Gas (2015)	Electricity change (2009-2015)	Gas change (2009-2015)
AT	60	75	-4	-10.3
BE	74.8	72.3	-16.9	-19.5
BG	100	100		
CY	100			
CZ	78	75.2	-20	-23.8
DE	40	22	-10	-3.42
DK	45	93	0	-7
EE	85	92	-8	0
ES	89.66	88.1	-5.54	-7.9
FI	40	95		
FR	99	92	3	-5
GB	54	63	-7	-9
GR	99.91	100	-0.09	
HR	99	61.78	-1	1.94
HU	73.19	83	-14.02	11.6
IE	89.9	88.43	-9.94	-11.57
IT	83.8	52.8	-6.1	1
LT	100	100	0	0
LU	98	100	3	7
LV	98	100	-2	
MT	100			
NL	78	76	-3.1	-3.4
NO	38		6	
PL	77.11	99.55		-0.38
PT	91	99.5	-9	1.6
RO	84.45	92.27	12.99	-2.58
SE	44	85	-3	
SI	65.9	67.4	-10.8	-6.6
SK	86.85	93.8	-13.15	-6.2

Figure 37, Page 64: Absolute number of suppliers with market shares above 5% measured by metering points in retail electricity and gas markets for household consumers and absolute one-year change – 2015 and 2014–2015 (number of suppliers)

Source: CEER National Indicators Database (2016) and ACER calculations.

MS	Electricity (2015)	Gas (2015)	Electricity change (2014-2015)	Gas change (2014-2015)
AT	5	3	-1	0
BE	5	5	0	0
BG	3	2	0	0
HR	1	3	0	0
CY	1		0	
CZ	5	5	1	0
DK	6	3	6	0
EE	2	1	0	0
FI	4	1	0	0
FR	2	2	0	0
DE	4	3	0	0
GB	6	6	0	0
GR	1	1	0	0
HU	2	4	-2	0
IE	4	5	0	2
IT	1	4	0	1
LV	1	1	0	0
LT	1	1	0	0
LU	2	2	0	0
MT	1		0	
NL	3	3	0	0
NO	4		0	
PL	5	1	0	0
PT	2	3	0	0
RO	4	2	-1	0
SK	3	3	0	0
SI	7	5	1	-1
ES	3	4	0	0
SE	4	4	-1	0

Figure 38, Page 65: Net entry of nationwide active suppliers into the retail electricity and gas markets for household consumers and three-year net entry average – 2015 and 2013–2015 (number of suppliers)
Source: CEER National Indicators Database (2015) and ACER calculations.

Electricity		
MS	Net entry (2015)	Average net entry (2013-2015)
RO	15	9
DE	8	9
CZ	0	9
PL	4	7
AT	9	6
NL	3	6
FI	6	6
GB	11	6
IT	9	5
ES	0	4
PT	4	3
DK	4	3
BE	3	1
LV	5	1
FR	0	1
SI	2	1
IE	1	1
GR	1	1
LT	0	0
HU	1	0
BG	0	0
LU	0	0
MT	0	0
CY	0	0
SK	1	0
NO	-5	0
HR	0	0
EE	0	-5

Gas		
MS	Net entry (2015)	Average net entry (2013-2015)
CZ	3	9
DE	11	8
NL	2	8
GB	12	7
IT	6	6
BE	12	5
PL	9	4
AT	2	3
RO	4	2
EE	6	2
ES	4	2
SI	0	2
PT	2	1
SK	0	1
FR	2	1
IE	0	0
DK	1	0
SE	0	0
CY	0	0
LT	-1	0
LV	0	0
GR	0	0
HR	0	0
LU	0	0
BG	-3	-2
HU	-1	-2

Figure 39, Page 66: Five-year average of external switching rates and three-year average of internal switching rates of electricity and gas household consumers – 2011–2015 and 2010–2013 (%)

Source: CEER National Indicators Database (2016) and ACER calculations.

Electricity		
MS	External switching rates (2011-2015)	Internal switching rates (2010-2013)
CY	0.00	
BG	0.00	0.50
HU	NA	0.75
LU	0.10	2.25
LV	0.00	3.25
RO	0.01	5.50
LT	0.00	8.00
EE	0.40	13.00
PL	0.86	4.75
HR	1.18	0.00
GR	1.25	
AT	2.04	1.50
SK	3.09	3.50
DK	3.32	2.50
FR	3.50	4.25
SI	4.67	1.25
EU average	5.73	4.19
CZ	5.84	2.50
IT	5.90	4.50
DE	7.90	5.25
SE	10.02	7.00
FI	10.12	3.75
ES	11.38	5.50
BE	11.70	5.00
GB	12.62	5.25
NL	12.77	4.75
IE	13.00	5.25
NO	13.32	2.67
PT	19.75	6.50

Gas		
MS	External switching rates (2011 - 2015)	Internal switching rates (2010 - 2013)
LT	0.02	
HU		0.50
NO		1.00
FI		1.00
HR	0.00	1.00
LV	0.00	2.00
LU	0.02	2.00
PL	0.09	2.00
BG	0.00	2.75
GR	0.00	2.75
RO		4.25
SE	0.65	4.00
AT	2.54	1.75
SI	4.84	1.50
SK	4.85	3.50
IT	5.50	1.75
FR	6.50	4.75
EU average	6.63	2.76
EE	6.72	2.25
DE	7.90	6.25
DK	7.92	2.50
CZ	9.38	2.25
GB	11.80	5.00
NL	12.72	4.00
BE	13.62	4.25
ES	14.35	3.00
IE	16.77	3.50
PT	26.40	2.25

Figure 40, Page 67: Proportion of electricity and gas consumers who have not switched and consumers who are supplied by a different supplier than their incumbent supplier – 2014 and 2015 (%)

Source: CEER National Indicators Database (2016) and ACER calculations.

MS	Electricity		
	Consumers with incumbent suppliers (2015)	Consumers with non-incumbant suppliers (2015)	Consumers with incumbent suppliers (2014)
CY	100.00	0.00	100.00
BG	100.00	0.00	100.00
LT	100.00	0.00	100.00
RO	99.88	0.12	99.98
GR	99.57	0.43	99.83
LU	99.16	0.84	NA
LV	98.94	1.06	99.50
PL	97.56	2.44	98.14
HU	97.52	2.48	97.65
HR	92.16	7.84	93.11
FR	88.42	11.58	90.36
SK	87.98	12.02	90.42
ES	80.40	19.60	83.16
SI	78.49	21.51	82.88
DE	72.57	27.43	74.59
NO	70.00	30.00	64.81
CZ	69.26	30.74	69.09
IE	59.59	40.41	NA
BE	42.64	57.36	53.70
GB	35.52	64.48	34.13
NL	34.00	66.00	NA
PT	33.66	66.34	52.54
FI	NA	NA	NA
MT	NA	NA	NA
SE	NA	NA	NA
EE	NA	NA	NA
AT	NA	NA	NA
IT	NA	NA	NA
DK	NA	NA	NA

Gas			
MS	Consumers with incumbent suppliers (2015)	Consumers with non-incumbant suppliers (2015)	Consumers with incumbent suppliers (2014)
GR	100.00	0.00	100.00
LT	100.00	0.00	100.00
HR	100.00	0.00	100.00
BG	100.00	0.00	100.00
LV	100.00	0.00	100.00
FI	100.00	0.00	100.00
HU	100.00	0.00	98.18
LU	99.83	0.17	99.85
RO	99.82	0.18	99.93
PL	99.59	0.41	99.31
DK	92.64	7.36	94.59
FR	80.27	19.73	83.28
DE	79.38	20.62	82.96
SK	79.30	20.70	81.24
CZ	70.00	30.00	93.39
ES	64.05	35.95	66.03
IE	55.12	44.88	52.03
BE	51.92	48.08	49.55
GB	36.83	63.17	37.84
NL	34.00	66.00	NA
PT	22.72	77.28	34.98
CY	NA	NA	NA
SI	NA	NA	NA
IT	NA	NA	NA
SE	NA	NA	NA
NO	NA	NA	NA
AT	NA	NA	NA
EE	NA	NA	NA
MT	NA	NA	NA

Figure 41, Page 68: Number of offers per supplier available in capital cities – 2014 and 2015
Source: ACER Retail Database (2016).

MS	Electricity		Gas	
	2014	2015	2014	2015
AT	2.0	2.2	1.8	2.3
BE	2.4	2.8	2.3	2.7
BG	1.0	1.0	1.0	1.0
CY	1.0	1.0		
CZ	2.3	1.9	2.3	2.1
DE	2.7	2.6	2.8	2.7
DK	3.2	3.3	3.8	4.0
EE	3.3	4.1	1.0	1.0
ES	1.9	1.7	4.2	4.2
FI	5.6	5.2	1.0	2.0
FR	2.0	1.8	3.0	2.4
GB	2.7	3.2	2.6	2.5
GR	1.0	1.1	1.0	1.0
HR	1.0	2.5	1.0	1.0
HU	1.0	1.0	1.0	1.0
IE	2.3	3.3	1.5	3.0
IT	2.1	2.5	2.1	2.4
LT	1.0	2.5	1.0	1.0
LU	3.0	4.0	3.0	4.3
LV	1.0	4.1	1.0	1.0
MT	1.0	1.0		
NL	3.4	3.4	3.4	3.0
NO	2.8	5.1		
PL	5.1	7.2	1.0	1.0
PT	4.3	3.3	4.0	2.8
RO	1.0	2.0	1.0	1.0
SE	4.2	4.5	3.3	3.4
SI	1.3	1.0	1.1	1.1
SK	1.0	1.0	1.1	1.0

Figure 42, Page 68: Ability of consumers to compare prices easily in retail electricity and gas markets for household consumers – 2015 (score)

Source: DG Justice and Consumers (2014 and 2016).

MS	Electricity (score)		Gas (score)	
	2013	2015	2013	2015
AT	6.0	8.0	5.9	8.0
BE	6.8	6.4	6.7	6.7
BG	4.6	5.0	6.9	7.1
HR	4.9	5.5	5.9	6.4
CY	6.0	6.8		
CZ	6.5	6.8	6.4	6.9
DK	5.1	4.9	5.2	5.3
EE	5.4	7.2	6.9	7.9
FI	6.3	6.8		
FR	7.2	8.2	6.9	7.9
DE	7.6	7.9	7.1	8.0
GB	6.0	6.7	6.2	6.6
GR	5.7	6.5	7.0	7.1
HU	6.3	7.3	5.7	7.5
IE	6.3	7.1	6.4	6.9
IT	5.6	6.2	6.4	6.4
LV	4.0	6.1	5.7	7.1
LT	8.1	7.3	8.7	8.8
LU	7.2	8.3	7.6	8.3
MT	6.7	7.3		
NL	6.6	6.4	6.6	6.5
NO	6.2	6.4		
PL	6.0	5.8	6.8	6.7
PT	6.0	6.5	6.6	7.7
RO	7.0	6.9	6.9	7.1
SK	7.1	7.3	7.3	7.5
SI	7.4	7.3	7.9	8.0
ES	5.0	4.5	5.9	5.8
SE	5.7	5.7		

Figure 43, Page 69: Consumer expectations perceived in retail electricity and gas markets for household consumers – 2015 (score)

Source: DG Justice and Consumers (2014 and 2016).

MS	Electricity (score)		Gas (score)	
	2013	2015	2013	2015
AT	8.3	8.1	7.8	8.3
BE	7.7	7.9	7.6	8.1
BG	4.5	5.9	7.0	7.6
HR	6.5	7.0	6.6	7.4
CY	6.0	7.5		
CZ	7.2	7.0	7.1	7.1
DK	8.2	8.5	8.1	8.4
EE	6.7	8.3	7.8	8.7
FI	8.3	8.5		
FR	7.4	8.2	7.3	8.1
DE	7.9	8.0	7.4	8.3
GB	6.8	8.0	7.0	7.8
GR	5.8	6.8	7.4	7.6
HU	6.7	8.8	6.0	8.5
IE	7.5	8.4	7.2	8.2
IT	6.8	7.6	6.9	7.5
LV	7.4	7.5	7.5	8.4
LT	7.5	7.8	8.2	8.8
LU	8.0	8.3	7.5	8.4
MT	6.9	8.0		
NL	8.0	8.0	7.6	8.0
NO	7.1	7.3		
PL	6.9	7.2	7.2	7.9
PT	6.8	7.6	7.5	8.4
RO	6.6	7.9	6.9	7.9
SK	7.8	8.6	7.9	8.7
SI	8.4	8.2	8.4	8.8
ES	5.8	5.8	6.9	7.2
SE	8.0	8.2		

Figure 44, Page 69: Mark-up and relationship between wholesale prices and the energy component of the retail electricity price in the household segment for a selection of countries with non-regulated retail prices – 2008–2015 (euros/MWh)

Source: ACER Retail Database (2016), Eurostat (26 August 2016), NRAs, European power exchanges data (2016) and ACER calculations.

Retail energy component (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
AT	67.8	71.0	71.0	80.2	76.8	75.8	70.5	64.6
BE		69.8	74.1	75.8	78.3	70.9	69.4	83.3
CZ			47.5	45.9	48.2	44.2	36.6	37.7
DE	80.1	79.8	87.7	80.7	84.5	86.6	77.2	74.1
EE				31.8	48.3	47.9	46.0	43.4
FI	55.0	55.1	58.1	64.5	61.3	60.3	56.2	52.7
GB	101.4	88.3	89.3	90.6	101.0	103.3	113.2	115.5
GR					55.0	65.8	78.7	91.5
IE				86.9	103.5	96.3	104.1	93.2
IT	94.4	92.0	77.9	80.7	91.7	85.0	79.6	77.4
LU	62.6	90.9	73.0	71.3	74.7	69.8	72.1	62.1
NL	84.8	91.4	78.9	77.9	78.8	76.2	74.5	69.2
NO	59.0	45.5	60.3	53.5	43.5	52.2	46.5	33.0
SE	62.0	54.2	67.0	63.9	60.2	56.5	47.7	40.8
SI				60.5	62.3	61.2	58.5	57.3

Wholesale price (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
AT	62.1	64.6	57.4	54.0	55.4	52.0	42.7	36.9
BE		66.8	59.8	53.9	55.3	53.6	46.7	46.6
CZ			56.8	52.2	53.7	50.6	42.2	36.5
DE	62.1	64.6	56.9	53.2	54.4	50.6	42.8	37.0
EE				44.8	41.5	44.8	39.5	33.0
FI	46.6	50.8	48.3	48.1	51.3	44.6	43.8	41.3
GB	72.3	73.3	56.5	56.5	62.0	64.2	62.6	60.4
GR					60.1	44.0	59.5	53.3
IE				66.2	67.9	71.3	61.9	53.7
IT	85.6	88.7	70.4	73.4	78.0	74.6	65.3	56.7
LU	62.6	65.0	55.6	52.4	53.3	49.8	41.0	35.5
NL	67.5	68.4	59.4	54.0	56.5	55.7	49.4	44.6
NO	44.1	35.8	59.6	49.4	33.3	39.1	29.4	22.0
SE	50.5	38.1	62.9	49.7	34.9	40.4	32.1	22.5
SI				60.9	57.6	47.0	43.7	43.9

Mark-up (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
AT	5.7	6.4	13.6	26.2	21.4	23.8	27.8	27.7
BE		3.0	14.3	21.9	23.0	17.3	22.7	36.7
CZ			-9.3	-6.3	-5.5	-6.4	-5.6	1.2
DE	18.0	15.2	30.8	27.5	30.1	36.0	34.4	37.1
EE				-13.0	6.8	3.1	6.5	10.4

FI	8.4	4.3	9.8	16.4	10.0	15.7	12.4	11.4
GB	29.1	15.0	32.8	34.1	39.0	39.1	50.5	55.1
GR					-5.1	21.8	19.2	38.1
IE				20.7	35.6	25.0	42.2	39.5
IT	8.8	3.4	7.5	7.3	13.7	10.4	14.3	20.7
LU	0.0	25.9	17.4	18.9	21.4	20.0	31.1	26.6
NL	17.3	23.0	19.5	23.9	22.3	20.5	25.1	24.6
NO	14.9	9.7	0.7	4.1	10.2	13.1	17.1	11.0
SE	11.5	16.1	4.1	14.2	25.3	16.1	15.6	18.3
SI				-0.4	4.7	14.2	14.8	13.4

Figure 45, Page 72: Mark-up and relationship between wholesale prices and the energy component of the retail electricity price in the household segment for a selection of countries with regulated retail prices – 2008–2015 (euros/MWh)

Source: ACER Retail Database (2016), Eurostat (26 August 2016), NRAs, European power

Retail energy component (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
DK	80.2	46.7	60.0	67.6	52.8	48.3	46.3	38.2
ES	72.2	79.2	66.5	71.2	58.6	53.7	51.5	48.0
FR					55.6	58.5	63.7	59.6
HU					69.2	57.6	47.1	48.2
LT			45.1	47.5	47.9	48.1	49.1	49.6
LV						28.9	29.0	53.1
PL				57.4	63.2	58.6	55.5	55.4
PT	61.2	78.7	52.1	54.0	64.1	64.1	60.4	57.0
RO	35.7	31.4	33.4	32.0	25.9	36.6	37.5	41.7
SK			72.2	65.4	68.7	63.3	53.5	48.0

Wholesale price (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
DK	53.4	52.4	42.9	47.9	51.1	43.2	38.8	34.7
ES	58.0	59.5	49.2	47.8	52.5	53.9	50.0	51.0
FR					56.7	54.0	46.2	43.9
HU					60.6	57.3	45.8	44.5
LT			47.7	46.4	46.9	51.0	53.3	45.2
LV						55.3	53.3	45.1
PL				50.4	50.0	47.6	43.4	40.6
PT	62.8	59.2	49.6	48.0	52.6	52.3	50.0	50.6
RO	54.0	37.3	39.2	54.7	53.0	38.6	37.7	39.4
SK			46.3	53.1	45.1	39.6	35.6	20.8

Mark-up (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
DK	26.8	-5.7	17.1	19.7	1.7	5.1	7.5	3.5
ES	14.2	19.7	17.2	23.4	6.1	-0.3	1.5	-2.9
FR					-1.1	4.5	17.5	15.7
HU					8.6	0.3	1.3	3.7
LT			-2.7	1.0	0.9	-3.0	-4.2	4.4
LV						-26.4	-24.3	8.0
PL				7.0	13.2	11.0	12.1	14.8
PT	-1.7	19.5	2.5	6.1	11.5	11.9	10.4	6.4
RO	-18.3	-5.9	-5.8	-22.7	-27.1	-2.0	-0.2	2.3
SK			25.9	12.3	23.6	23.7	17.9	27.2

Figure 46, Page 73: Mark-up and relationship between wholesale prices and the energy component of the retail gas price in the household segment in a selection of countries with non-regulated retail prices – 2012 –2015 (euros/MWh)

Source: ACER Retail Database (2016), Eurostat (26 August 2016), NRAs, European power exchanges data (2016) and ACER calculations.

Retail energy component (euros/MWh)				
MS	2012	2013	2014	2015
AT	38.1	36.7	36.8	35.4
BE	47.3	35.3	35.6	28.8
CZ	37.2	33.8	36.3	38.1
EE	35.7	33.8	33.6	29.0
DE	44.4	37.5	38.0	37.7
GB	42.5	41.5	45.9	48.8
IE	36.2	36.5	36.7	35.9
IT	42.0	37.3	35.0	32.5
LU	51.1	45.6	38.8	36.7
SI	33.7	33.2	35.3	30.6
SE	42.7	44.3	40.6	39.4
NL	39.8	36.4	36.7	31.7

Wholesale price (euros/MWh)				
MS	2012	2013	2014	2015
AT	25.6	26.9	24.6	21.7
BE	24.6	27.0	23.8	21.1
CZ	35.0	30.7	24.3	21.3
EE	33.4	33.4	32.0	27.2
DE	25.9	27.2	23.9	21.1
GB	25.9	27.6	24.1	21.5
IE	26.3	28.0	24.5	22.2
IT	33.2	30.9	25.7	22.9
LU	26.3	28.0	25.0	22.3
SI	37.6	31.0	27.6	23.0
SE	35.6	33.3	27.6	25.7
NL	25.8	27.2	23.7	21.0

Mark-up (euros/MWh)				
MS	2012	2013	2014	2015
AT	12.4	9.8	12.2	13.7
BE	22.6	8.4	11.8	7.7
CZ	2.2	3.1	12.0	16.8
EE	2.2	0.5	1.5	1.8
DE	18.5	10.3	14.1	16.6
GB	16.7	13.8	12.5	27.2
IE	9.9	8.5	12.2	13.6
IT	8.9	6.3	9.3	9.6
LU	24.7	17.6	13.8	14.4
SI	-3.9	2.1	7.8	7.6
SE	7.1	11.0	13.0	13.6
NL	14.1	9.2	13.0	10.6

Figure 47, Page 75: Mark-up and relationship between wholesale prices and the energy component of the retail gas price in the household segment for a selection of countries with regulated retail prices – 2012 – 2015 (euros/MWh)

Source: ACER Retail Database (2016), Eurostat (26 August 2016), NRAs, European power exchanges data (2016) and ACER calculations.

Retail energy component (euros/MWh)				
MS	2012	2013	2014	2015
BG	35.6	37.4	33.6	19.8
HR		40.9	35.7	26.7
DK	32.7	30.1	25.9	20.8
FR	40.6	37.7	35.1	29.2
GR	52.7	43.4	57.9	44.3
HU	28.2	23.0	29.1	18.8
LV	29.2	28.2	29.5	22.2
LT	43.6	40.7	29.5	24.6
PL	30.4	25.3	29.3	27.7
PT	29.6	28.7	34.5	33.2
RO	17.5	14.3	13.7	15.9
SK	29.3	28.7	28.6	26.4
ES	32.5	30.3	30.9	26.4

Wholesale price (euros/MWh)				
MS	2012	2013	2014	2015
BG	41.8	32.0	30.9	25.8
HR		35.1	28.9	23.4
DK	29.0	27.6	24.1	20.9
FR	29.9	29.9	24.7	21.4
GR	33.8	32.2	28.2	21.9
HU	32.2	30.6	26.4	23.4
LV	33.4	32.1	29.3	24.8
LT	38.8	37.5	35.3	27.9
PL	31.5	30.5	25.1	23.4
PT	28.9	29.3	31.8	23.7
RO	10.3	10.7	11.7	12.7
SK	30.8	30.7	25.4	21.5
ES	27.6	27.3	26.2	21.9

Mark-up (euros/MWh)				
MS	2012	2013	2014	2015
BG	-6.2	5.3	2.6	-5.9
HR		5.8	6.7	3.3
DK	3.7	2.6	1.8	-0.1
FR	10.7	7.8	10.4	7.9
GR	18.9	11.2	29.8	22.3
HU	-4.0	-7.6	2.7	-4.5
LV	-4.2	-4.0	0.2	-2.6
LT	4.9	3.2	-5.8	-3.3
PL	-1.1	-5.2	4.2	4.3

PT	0.7	-0.5	2.7	9.5
RO	7.3	3.7	2.0	3.1
SK	-1.5	-2.0	3.2	5.0
ES	4.9	3.0	4.7	4.4

Figure 48, Page 77: Relationship between wholesale prices and the energy component of the retail electricity price in the industrial segment for a selection of countries with non-regulated retail prices – 2008–2015 (euros/MWh)

Source: ACER Retail Database (2016), Eurostat (26 August 2016), NRAs, European power exchanges data (2016) and ACER calculations.

Retail energy component (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
AT		70.7	66.9	65.7	62.3	58.7	53.1	48.6
BE		71.1	67.2	68.2	66.7	60.7	57.4	52.7
CZ			71.2	63.2	61.1	56.3	45.9	42.0
DE		68.1	64.6	64.0	61.1	59.6	51.8	48.0
EE				35.0	31.8	44.9	42.8	43.0
FI	48.8	48.5	49.1	50.7	49.4	49.6	47.0	44.6
GB	82.7	78.3	64.6	60.7	67.8	66.0	59.8	65.7
NL		77.1	65.2	62.7	62.7	60.2	55.5	51.7
NO	44.6	38.0	46.7	42.1	34.5	39.2	34.0	23.5
SE	56.4	46.9	59.0	53.6	48.2	48.4	42.0	33.1

Wholesale (Euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
AT		69.9	61.5	56.5	56.5	52.6	43.7	37.9
BE		71.9	63.7	56.7	56.7	55.0	49.3	49.7
CZ			68.8	61.2	60.1	55.9	47.0	40.5
DE		69.9	61.5	56.5	56.5	52.6	43.7	37.7
EE				46.4	48.0	48.6	44.7	38.6
FI	49.1	46.4	50.4	48.4	46.2	43.8	41.6	37.9
GB	73.5	70.2	51.0	56.8	59.7	59.1	58.4	56.6
NL		81.8	68.6	61.5	61.4	59.7	53.3	48.1
NO	43.4	39.8	52.7	46.8	35.3	39.8	31.7	24.0
SE	52.2	43.3	56.6	48.7	38.5	42.1	35.1	25.4

Mark-up (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
AT		0.8	5.3	9.2	5.8	6.0	9.4	10.7
BE		-0.8	3.5	11.5	9.9	5.7	8.1	3.0
CZ			2.4	2.0	1.0	0.4	-1.2	1.5
DE		-1.8	3.1	7.6	4.6	7.0	8.1	10.4
EE				-11.3	-16.2	-3.7	-1.9	4.4
FI	-0.3	2.1	-1.2	2.3	3.1	5.8	5.4	6.7
GB	9.2	8.1	13.5	3.8	8.0	6.8	1.4	9.1
NL		-4.6	-3.4	1.2	1.3	0.5	2.2	3.5
NO	1.2	-1.8	-6.0	-4.7	-0.8	-0.6	2.3	-0.5
SE	4.1	3.6	2.4	4.9	9.7	6.4	6.9	7.7

Figure 49, Page 78: Relationship between wholesale prices and the energy component of the retail electricity price in the industrial segment for a selection of countries with regulated retail prices –
Source: ACER Retail Database (2016), Eurostat (26 August 2016),

Retail energy component (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
DK	64.4	40.1	54.7	45.8	37.9	39.3	37.8	30.2
FR					47.8	53.6	54.2	49.7
LT				46.7	49.2	54.5	60.6	55.3
LV							49.4	47.6
PL							41.6	43.1

Wholesale price (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
DK	63.4	47.1	54.7	53.5	47.2	45.2	37.2	29.2
FR					58.1	54.6	47.6	45.0
LT				47.9	51.3	50.3	56.2	58.0
LV							57.6	51.0
PL							44.5	44.9

Mark-up (euros/MWh)								
MS	2008	2009	2010	2011	2012	2013	2014	2015
DK	1.0	-7.0	0.0	-7.7	-9.3	-5.9	0.6	1.0
FR					-10.3	-1.0	6.6	4.7
LT				-1.1	-2.0	4.2	4.5	-2.6
LV							-8.2	-3.3
PL							-2.9	-1.8

Figure 50, Page 79: Average mark-up in retail electricity (2008–2015) and gas (2012–2015) markets for the household segment in a selection of countries with regulated prices (euros/MWh)

Source: ACER Retail Database (2016), Eurostat (26 August 2016), NRAs, European power exchanges data (2016) and ACER calculations.

Electricity mark-up (euros/MWh)								
	2008	2009	2010	2011	2012	2013	2014	2015
DK	26.8	-5.7	17.1	19.7	1.7	5.1	7.5	3.5
ES	14.2	19.7	17.2	23.4	6.1	-0.3	1.5	-2.9
FR					-1.1	4.5	17.5	15.7
HU					8.6	0.3	1.3	3.7
LT			-2.7	1.0	0.9	-3.0	-4.2	4.4
PL				7.0	13.2	11.0	12.1	14.8
PT	-1.7	19.5	2.5	6.1	11.5	11.9	10.4	6.4
RO	-18.3	-5.9	-5.8	-22.7	-27.1	-2.0	-0.2	2.3
SK			25.9	12.3	23.6	23.7	17.9	27.2

Gas mark-up (euros/MWh)				
	2012	2013	2014	2015
BG	-6.2	5.3	2.6	-5.9
DK	3.7	2.6	1.8	-0.1
ES	4.9	3.0	4.7	4.4
FR	10.7	7.8	10.4	7.9
GR	18.9	11.2	29.8	22.3
HR		5.8	6.7	3.3
HU	-4.0	-7.6	2.7	-4.5
LT	4.9	3.2	-5.8	-3.3
LV	-4.2	-4.0	0.2	-2.6
PL	-1.1	-5.2	4.2	4.3
PT	0.7	-0.5	2.7	9.5
RO	7.3	3.7	2.0	3.1
SK	-1.5	-2.0	3.2	5.0