



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

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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 |