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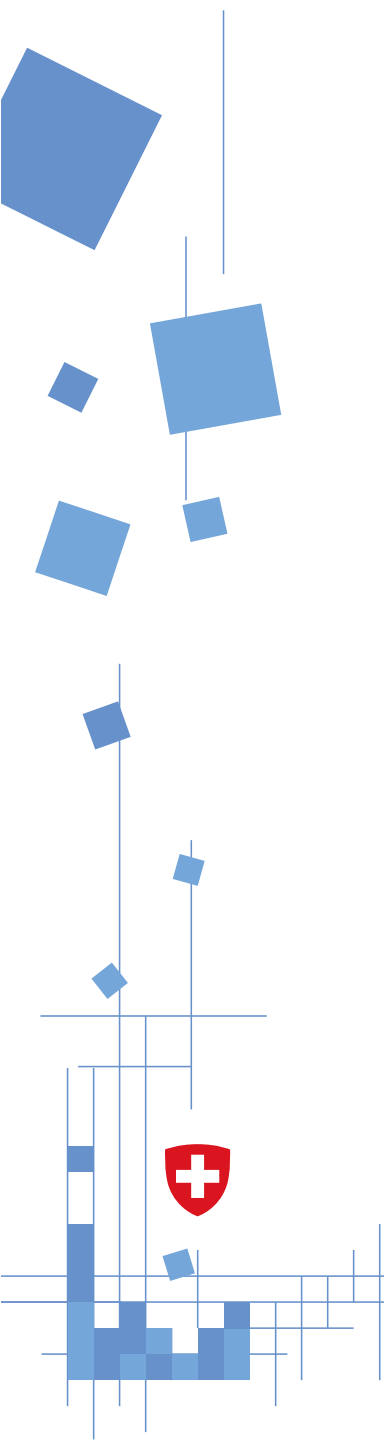
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Aligning price surveys in the energy sector with market liberalisation: current status and challenges

Mirko Huber, Federal Statistical Office (FSO) – Switzerland

Webinar: Improving the quality of energy price data
International Energy Agency, 17 September 2026



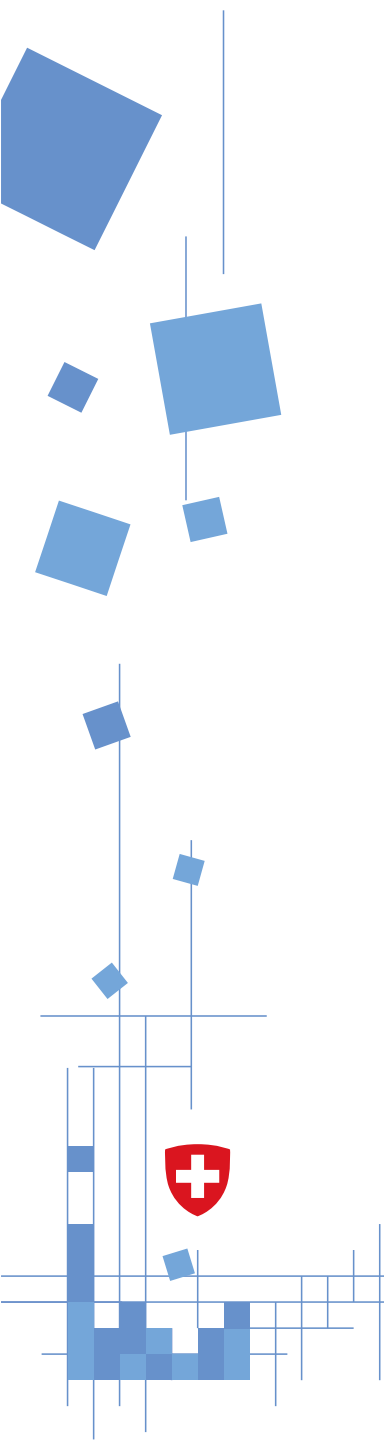
Introduction

- This presentation focuses mainly on developments in the **electricity** and **natural gas** sectors
- Unlike many other markets, the electricity sector in Switzerland is only **partially liberalised**; the gas market is not regulated/liberalised at all.
- **Further liberalisation** is on the horizon, but is politically controversial and has therefore not yet been decided



Alignment of electricity price surveys with the (partial) liberalisation

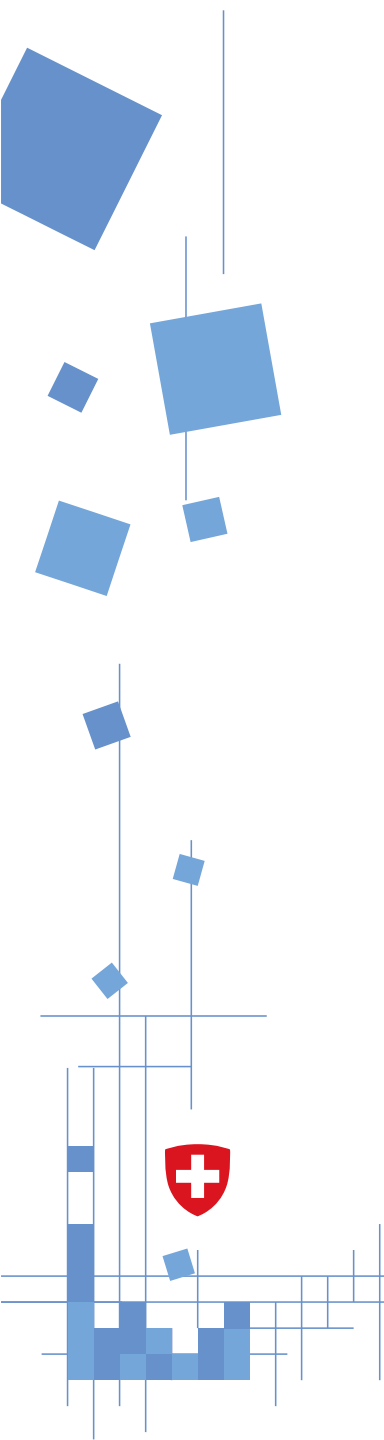




Survey methodology

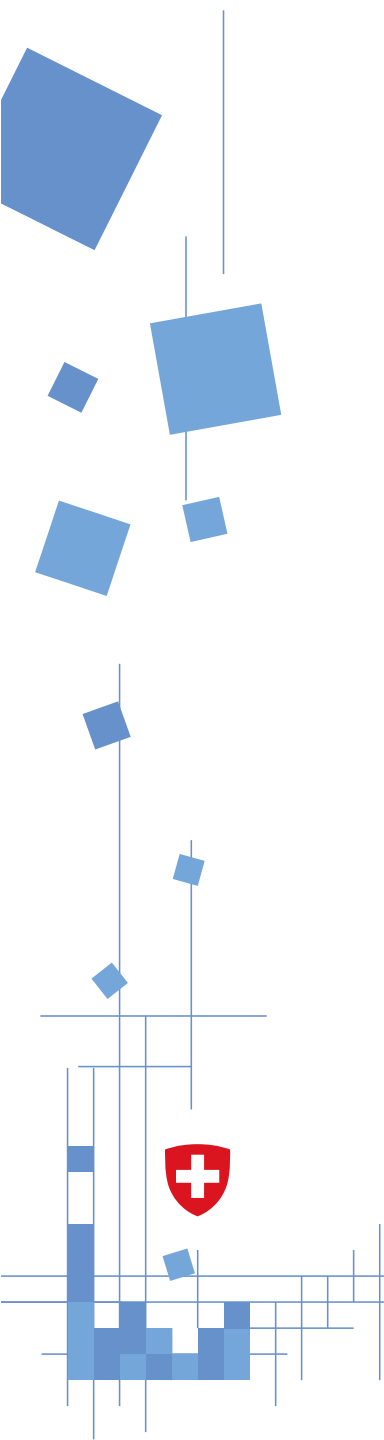
- **Electricity:**
 - **Direct collection of average prices** from around 40 electricity supply companies in Switzerland (from 100 MWh/a) four times a year
 - **Tariffs** (regulated basic supply) for households and small businesses via the regulator (Elcom)
 - Market coverage approx. **60%**
- **Stratified survey** using predefined size categories based on annual consumption
- Collection and updating of **weighting data** every 5 years





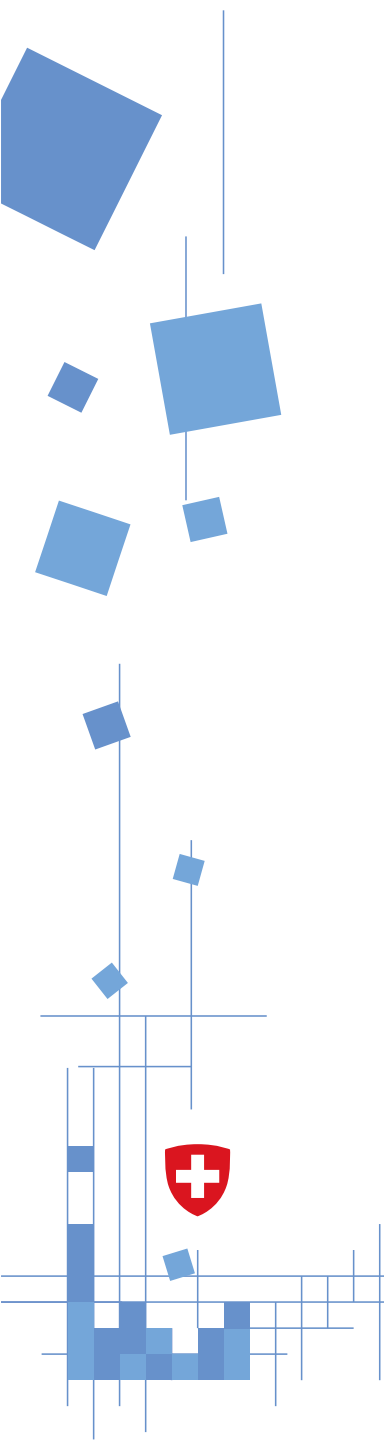
Liberalisation of the electricity market

- A long-term **increase** in the proportion of **market-based** transactions in the total
- 2020: Approx. **35%** of energy sales are based on market prices (approx. **80%** of eligible companies)
- 2025: Approx. **39%** of the energy sales are now based on market prices (approx. **80%** of eligible companies)



The impact of liberalisation on price surveys in the electricity sector

- New **market players** (pure traders rather than electricity supply companies)
- New **pricing models** (including rapid price adjustments)
- Existing suppliers are withdrawing from certain market segments, whilst others are expanding
- Price surveys now only **retrospectively** possible
 - **A delay of 2–14 months** before inclusion in the price index
- Differentiation of surveys into (regulated) **energy tariffs / market prices for energy / network services**
- **Change in methodology** upon introduction of the average price method (prospective vs. retrospective price collection)



Adjustments to price surveys

- From 2015: Collection of average prices for **large end-users** (3 GWh/year and above)
- From 2020: Collection of average prices for **medium-sized end customers** (100 MWh/year and above)
- From 2023: **quarterly** price survey for end customers using 100 MWh/year or more

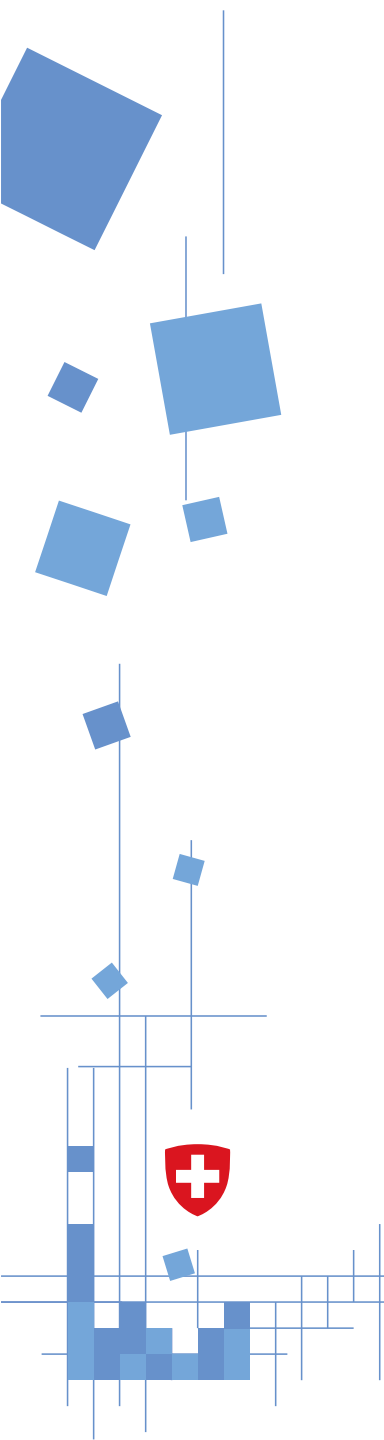
Liberalisation of the electricity market

Future scenarios for price surveys:

- (possible) **Electricity market agreement** with the EU:
 - Adjustment of the data collection methodology may be required
 - Extension of liberalisation to households optional but not compulsory
 - Regulated basic supply remains possible

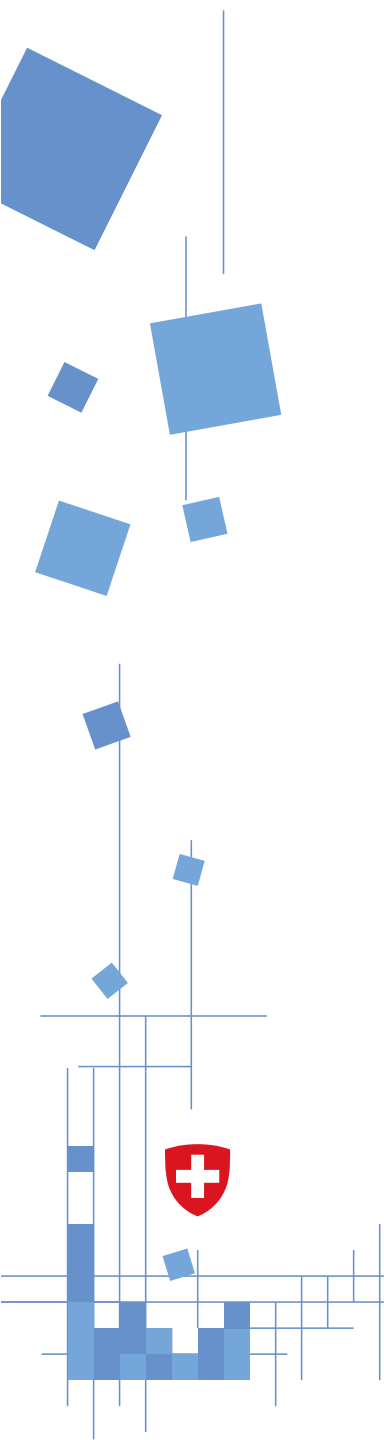
Alignment of the natural gas price survey with the actual market situation





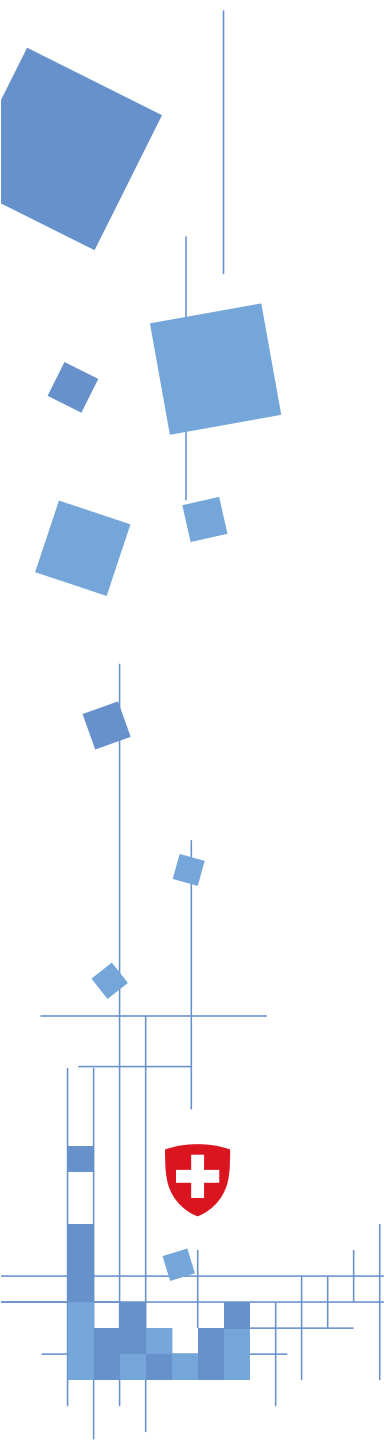
Survey methodology

- **Natural gas** (including approx. 10% biogas based on imported Guarantees of origin):
 - **Direct collection** from around 30 gas supply companies in Switzerland, four times a year
 - Until 2025, only **tariffs**; from 2026 onwards, also **market prices** (average prices)
 - Market coverage approx. **75%**
- **Stratified survey** using predefined size categories based on annual consumption
- Collection and updating of **weighting data** every 5 years



Absence of regulation regarding natural gas market

- 2025: Just under **20%** of gas sales are based on **market prices**
- **Regulation** is **rudimentary** by law (pipeline act); market mechanisms have mainly taken place through decisions by the competition authority or court rulings
- In practice, a **monopoly situation** for most end customers
- **Some** end customers (particularly large customers) have supply contracts based on **market prices**, in some cases with suppliers outside their own supply area



Changes to the price survey in the natural gas sector

- From 2026: Collection of **average prices** (including market prices) for medium-sized and (relatively) large end customers
- This will take place from 2026 **quarterly** (previously annually)
- The issue of highly seasonal fluctuations in consumption patterns leads to significant price changes during the year in some cases (the ratio of fixed to variable costs varies considerably)

Survey schedule

Sector	Data collection	Publication date	Delivery date to IEA
Gasoline, Diesel, kerosene, fuel oil, coal	Reference date between 1. and 8. of each month	t+1 month	t+1 month
Electricity – households & small businesses	1x per year (fixed prices per calendar year)	t+1 month	t+1 month
Natural Gas – households	1x per year (normally fixed prices per calendar year – price changes are taken into account t+1)	t+1 month	t+1 month
Electricity & Natural Gas – industry	Quarterly	t+3 months until t+5 months	t+3 months until t+5 months

Data publication and delivery always around the middle of the month

Miscellaneous / Questions



Thank you for your attention!



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