Electricity & Gas Retail Markets Report
Q1 2013

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The Commission for Energy Regulation,
The Exchange,
Belgard Square North,
Tallaght,
Dublin 24.

www.cer.ie

1.0 Introduction

The purpose of this paper is to provide industry and interested stakeholders with relevant information[1] on the developments of competition in the electricity and gas retail markets in the first quarter of 2013.

2.0 Market Share

2.1 Electricity Market Share by Customer Numbers & MWhs

This section contains the market share data for all electricity suppliers. Data is presented in terms of actual customer numbers and consumption (MWhs) for Q1 2013 as well as showing the change in percentage share since the previous quarter.[2]

Q1 2013	Domestic Market Share	
	Cust Nos	MWhs
Electric Ireland	1,298,784	1,461,481
Airtricity	371,351	485,359
Bord Gáis Energy	317,185	444,047
PrePayPower[4]	27,682	27,110
Others	4,510	10,898
Total	**2,019,512**	**2,428,895**

1 (a) Domestic Market

Q1 2013	Small Business Market Share		Medium Business[3] Market Share	
	Cust Nos	MWhs	Cust Nos	MWhs
Electric Ireland	86,757	322,418	13,713	264,696
Airtricity	39,553	230,693	3,767	304,421
Bord Gáis Energy	17,752	100,634	1,128	86,173
Energia	45,249	337,332	5,667	378,480
Others	202	3,440.05	157	22,251
Total	**189,513**	**994,517**	**24,432**	**1,056,021**

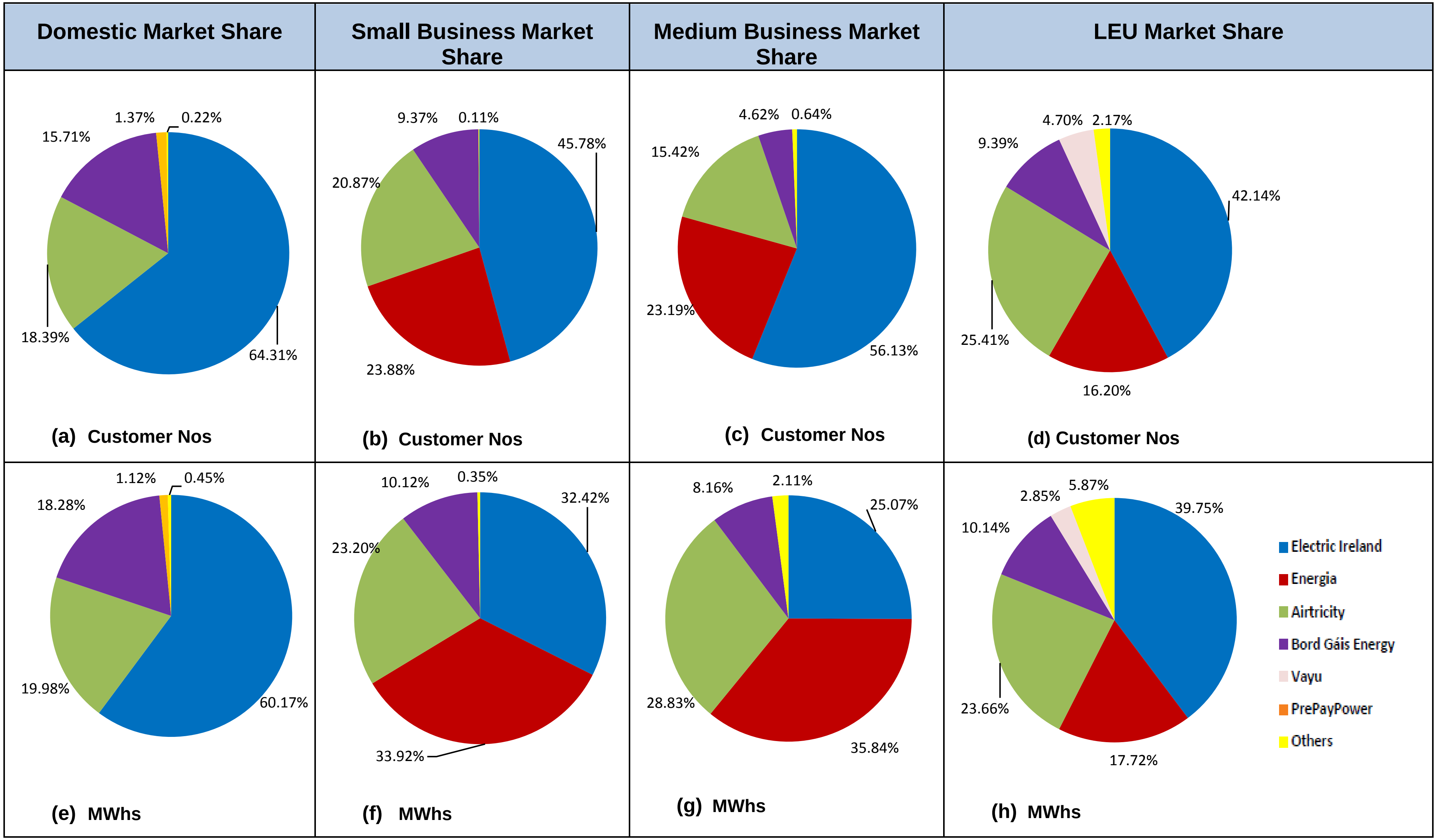
1 (b) Small Business & Medium Business Markets

Q1 2013	LEUs Market Share	
	Cust Nos	MWhs
Electric Ireland	700	764,825
Airtricity	422	455,171
Bord Gáis Energy	156	195,074
Energia	269	340,994
Vayu	78	54,880
Others	36	112,977
Total	**1,661**	**1,923,921**

1 (c) LEU Market

Tables 1 (a)-1 (c) Q1 2013 Electricity Customer Nos. & MWhs

[1] The primary sources of data in this report are: Electricity: MRSO (Meter Registration System Operator), ESBN (ESB Networks) and Gas: GPRO (Gas Point Registration Operator), Gaslink, BGN (Bord Gáis Networks).
[2] Only electricity suppliers with greater than 1% share of MWhs are reported separately in each market segment.
[3] 'Medium-sized business' includes low voltage maximum demand (DG6) and public lighting (DG 3&DG4).
[4] PrePayPower is now reported separately as it has a market share of MWhs of greater than 1%.



Figures 1 (a) – 1 (h) Q1 2013 Electricity Market Share by Market Segment

Q4 2012-Q1 2013	Domestic Market - Change in Market Share	
	Cust Nos	MWhs
Electric Ireland	-0.23%	+0.58%
Airtricity	+0.33%	+0.13%
Bord Gáis Energy	-0.55%	-1.01%
Others	+0.46%	+0.3%

2 (a) Domestic Market

Q4 2012-Q1 2013	Small Business - Change in Market Share		Medium Business - Change in Market Share	
	Cust Nos	MWhs	Cust Nos	MWhs
Electric Ireland	-0.10%	+1.38%	+0.16%	+0.19%
Airtricity	-0.41%	-0.51%	-0.56%	+1.72%
Bord Gáis Energy	+0.04%	-0.30%	-0.23%	-0.10%
Energia	+0.47%	-0.56%	+0.71%	-1.80%
Others	+0.01%	-0.01%	-0.07%	0.00%

2 (b) Small Business & Medium Business Markets

Q4 2012-Q1 2013	LEUs - Change in Market Share	
	Cust Nos	MWhs
Electric Ireland	+0.02%	-1.14%
Airtricity	-0.80%	+1.24%
Bord Gáis Energy	+0.02%	+0.83%
Energia	+0.57%	-0.72%
Vayu	+0.19%	+0.19%
Others	+0.00%	-0.40%

2 (c) LEU Market

Tables 2 (a)-2 (c) Change in Electricity Market Share from Q4 2012 - Q1 2013 by Supplier

- Customer numbers have decreased in the domestic, small business and LEU segments since Q4 2012, by 0.09%, 0.09% and 0.2%, and increased in the medium business market (by 0.17%).
- Electric Ireland remains the largest supplier (customers and MWhs) in the domestic (share of MWhs of 60.17%) and LEU segments (share of MWhs of 39.7%). Electric Ireland also has the largest share of customers in the small and medium business markets (shares of 45.8% and 56.1%).
- Energia is the largest supplier in terms of MWhs in the small and medium business segments with shares of 33.9% and 35.8% respectively. Energia has increased its share of customers, but reduced MWhs, in all segments in which it operates.
- Electric Ireland has increased its share of MWhs but its share of customers has reduced in the domestic and small business markets. Its share of customers has also increased in the medium and LEU segments.
- Bord Gáis Energy lost market share in terms of customers in the domestic and medium business markets, and in terms of MWhs in the domestic, small and medium markets. It has increased market share (customers & MWhs) in the LEU segment since Q4 2012.
- Airtricity has increased market share of customers and MWhs in the domestic market, but has lost customer share in the other segments. Its share of MWhs increased in the medium and LEU segments.
- PrePayPower entered the domestic market in 2011. PrePayPower now has a share of customers of 1.37% and of MWhs of 1.12%.

2.2 Gas Market Share by Customer Numbers & GWhs[5]

This section contains the market share data for all gas suppliers. Data is presented in terms of actual customer numbers and consumption (GWhs) for Q1 2013 as well as showing the change in the percentage share since the previous quarter.[6]

Q1 2013	Domestic Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	400,774	2,239
Airtricity	108,050	634
Electric Ireland	91,242	511
Flogas	31,427	181
Others	2	0
Total	**631,495**	**3,565**

3 (a) Domestic Market

Q1 2013	NDM IC[7] Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	10,336	268
Airtricity	1,446	46
Electric Ireland	852	14
Flogas	5,938	212
Energia	3,923	135
Vayu	534	29
Others	3	0
Total	**23,032**	**704**

3 (b) NDM IC Market

Q1 2013	FVT[8] eligible Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	574	270
Airtricity	140	43
Flogas	406	195
Energia	333	163
Vayu	297	176
Others	7	3
Total	**1,757**	**850**

3 (c) FVT Market

Q1 2013	RTF[9] eligible Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	50	256
Airtricity	24	129
Electric Ireland	13	52
Gazprom	13	297
Energia	63	356
Vayu	69	379
Phoenix	16	134
Total	**248**	**1,603**

3 (d) RTF Market

Tables 3 (a)-3 (d) Gas Customer Nos. (Q1 2013) & GWhs (Q1 2013)

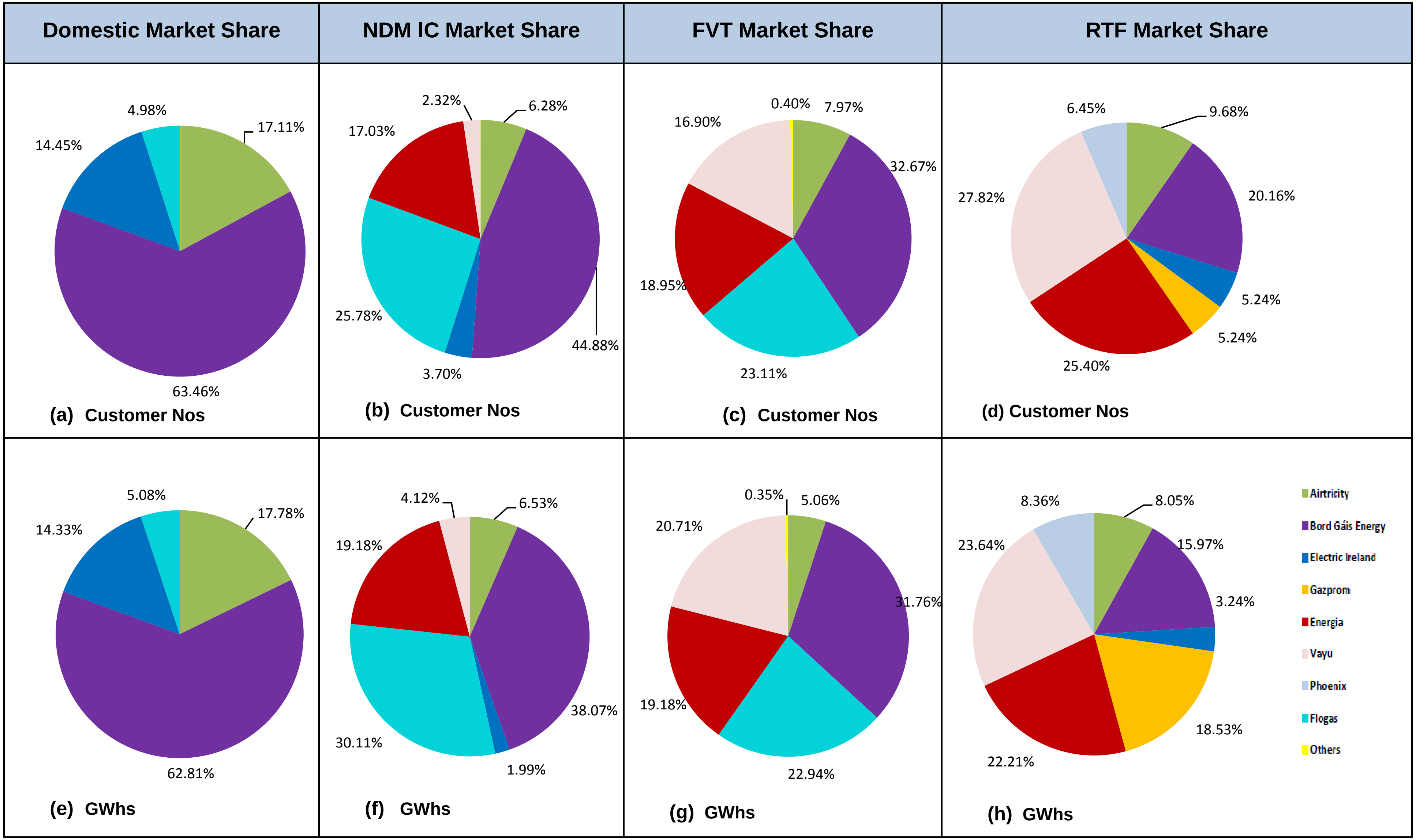
[5] The current method of calculation of gas volumes (GWhs) supplied uses Non Daily Metered (NDM) allocations data, which is derived statistically. Bord Gáis Networks (BGN) has suggested that this method of calculation is not the most statistically accurate, and when compared with reconciliation data (i.e. metered throughput), allocation data has accuracy in the range of +/-15% for NDM IC's and +/-4% for Residential. The gas consumption (GWhs) figures used are cumulative figures from the beginning of 2013.

[6] Only gas suppliers with greater than 5 customers are reported separately in each market segment.

[7] Non-daily metered industrial and commercial.

[8] Fuel variation tariff.

[9] Regulated tariff formula.



Figures 2 (a) – 2 (h) Q1 2013 Gas Market Share by Market Segment

Q4 2012 - Q1 2013	Domestic - Change in Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	-2.18%	-5.47%
Airtricity	-0.03%	-1.19%
Electric Ireland	+2.07%	+5.93%
Flogas	+0.14%	+0.73%

4 (a) Domestic Market

Q4 2012 - Q1 2013	NDM IC- Change in Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	-1.65%	-0.92%
Airtricity	+0.99%	+2.16%
Electric Ireland	+0.78%	+0.90%
Flogas	+0.13%	-0.42%
Energia	-0.11%	-1.99%
Vayu	-0.14%	+0.32%

4 (b) NDM IC Market

Q4 2012 - Q1 2013	FVT- Change in Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	-0.99%	-3.27%
Airtricity	+5.34%	+2.69%
Flogas	+0.76%	-0.16%
Energia	-0.82%	+2.82%
Vayu	-4.30%	-2.26%
Others	0%	+0.17%

4 (c) FVT Market

Q4 2012 - Q1 2013	RTF- Change in Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	+0.65%	-5.12%
Airtricity	-0.08%	+1.83%
Electric Ireland	+1.18%	+0.31%
Gazprom	-0.45%	-0.85%
Energia	+3.86%	+1.54%
Vayu	-3.88%	+3.97%
Phoenix	-1.27%	-1.69%

4 (d) RTF Market

Tables 4 (a) – 4 (d) Change in Gas Market Share from Q4 2012 - Q1 2013

- Customer numbers have increased in the domestic, IC, FVT and RTF segments since Q4 2012, by 0.15%, 0.36%, 0.4% and 0.8%.
- Bord Gáis Energy remains the largest supplier (customers and GWhs) in the domestic (share of customers of 63.46%), IC (share of customers of 44.88%) and FVT (share of customers of 32.67%) markets.
- Energia is the largest supplier in terms of customers in the RTF segment with a share of 25.4%, and Vayu is the largest in this segment in terms of GWhs (23.64% share).
- The RTF segment has the largest number of suppliers operating.
- Bord Gáis Energy continues to lose market share in terms of customers in the domestic, IC and FVT markets, however, has increased market share in the RTF segment since Q4 2012.
- Flogas and Electric Ireland have gained market share of customers in all the segments in which they respectively operate. Airtricity has lost customer share in the domestic and RTF segment but gained in IC and FVT.
- Energia lost market share in the IC and FVT segments but gained in the RTF. Vayu lost market share across all segments.

3.0 Customer Switching & New Registrations

Customer switching is a key indicator of retail competition and supplier activity within the retail market. This section contains data on customer switching activity with a breakdown of suppliers' switches in the relevant markets and new registrations.

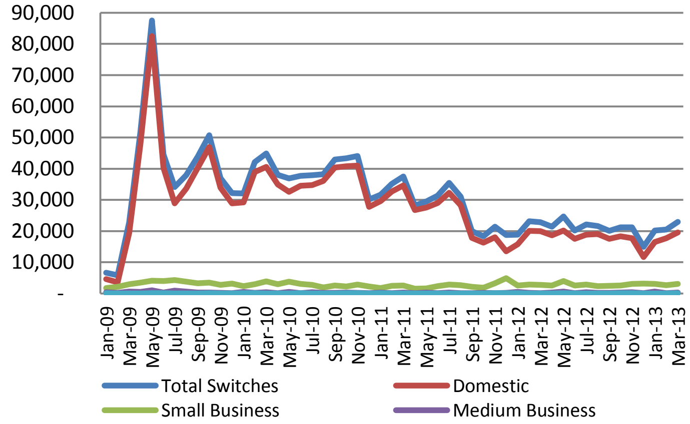


Figure 3 Total Switching - Electricity

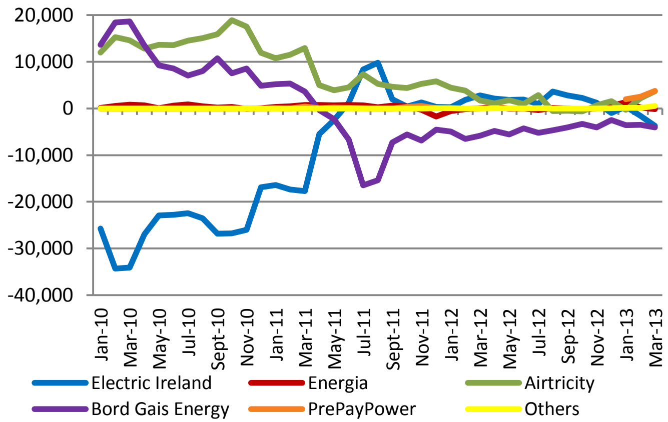


Figure 4 Total Net Change by Supplier - Electricity

Total Switching		
	Electricity	**Gas**
Q1 2012	64,788	26,705
Q2 2012	66,271	26,245
Q3 2012	63,730	27,276
Q4 2012	57,267	30,353
Q1 2013	63,574	30,783
% Change Q1 2012 - 2013	*-1.9%*	*+15.27%*

Table 5 Electricity & Gas Switching Trends

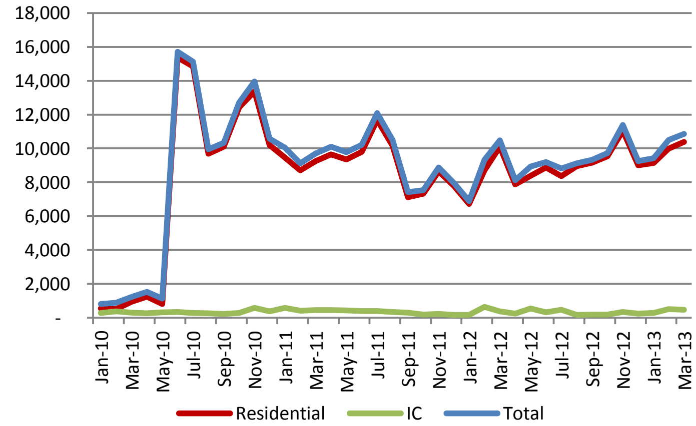


Figure 5 Total Switching - Gas

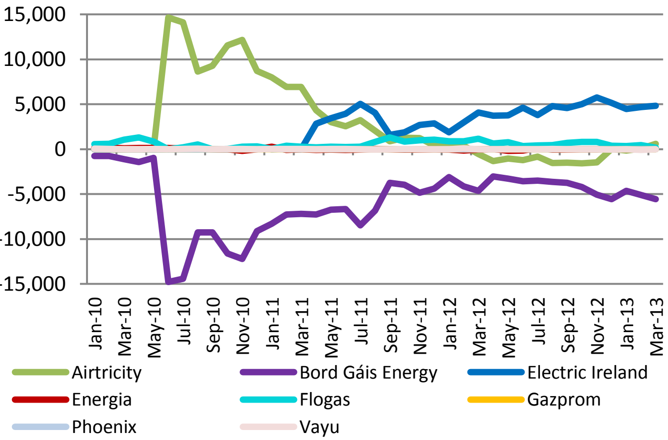


Figure 6 Total Net Change by Supplier - Gas

Electricity Switching

- Total switching in electricity was 63,574 in Q1 2013 (84.7% of which was in the domestic market). This represented an increase in switching since Q4 2012 of 11%, however a slight decrease when compared to Q1 2012 of -1.9%.
- Compared to Q1 2012, switching in the domestic and LEU segments has decreased (by 3.6% and 22.6% respectively), but switching increased in the small business and medium segments (by 7.7% and 22.3% respectively).
- At supplier level, Bord Gáis Energy experienced the largest net loss in Q1 2013 (of -11,163). This loss was larger than the loss Bord Gáis Energy experienced in Q4 2012 but lower than its losses in Q1, Q2 and Q3 2012.
- Electric Ireland experienced its first net loss in a quarter since Q2 2011 (of -4,899).
- PrePayPower gained the majority of customers in Q1 2013 (+8,274). Airtricity also gained significantly (+5,557) and Energia (+1,463).

Gas Switching

- Total switching in gas was 30,783 in Q1 2013 (95.9% of which was in the domestic market). This represented an increase in switching since Q4 2012 of 1.4% and a significant increase since Q1 2012 of 15.27%.
- Compared to Q1 2012, switching in the domestic and IC markets has increased by 15.62% and 7.68% respectively.
- At supplier level, Bord Gáis Energy experienced the largest net loss in Q1 2013 (of -15,301). This was the largest net loss experienced by Bord Gáis Energy since Q3 2011.
- Electric Ireland experienced the largest net gain in Q1 2013, of +13,998.
- Airtricity and Flogas had small net gains, with Energia and Vayu experiencing small net losses.

New Registrations

- In Q1 2013, there were 3,166 new electricity and 1,400 new gas registrations.
- 86% of new electricity registrations were with Electric Ireland.
- Over 72% of new gas registrations were with Bord Gáis Energy.

4.0 PAYG, Debt Flagging & Disconnections

4.1 Pay as You Go Meters – PAYG

The CER has been working with industry to facilitate the rollout of electricity and gas PAYG meters free of charge for customers experiencing financial hardship. This section looks at the trend in the installation of PAYG meters.

PAYG Meters	Q3 2011	Q4 2011	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Cumulative total
Electricity PAYG	N/A	711	2,485	3,596	4,384	4,248	5,303	**39,233 (approx. including 18,500 Token meters)**
Gas PAYG	5,445	8,188	3,276	3,491	3,431	2,532	4,369	**75,000 (approx.)**

Table 6 PAYG Meter Installations Electricity & Gas

- There were 5,303 electricity PAYG meters installed in Q1 2013. This represents a 24.8% increase since Q4 2012. The total number of electricity PAYG meters installed since October 2011 is 20,733. In addition, there are approximately 18,500 token meters in operation.
- There were 4,369 gas PAYG meters installed in Q1 2013 (of which 82.7% were installed for financial hardship reasons). This represents a 72.5% increase since Q4 2012. The total number of gas PAYG meters installed since December 2008 is approximately 75,000 with almost 30,732 since October 2011.

4.2 Debt Flagging

Where a customer requests to change to a new supplier, the customer's existing supplier has the facility to inform the new supplier if the customer has an outstanding debt, above the industry thresholds approved by the CER. The new supplier can then choose whether to proceed with or cancel the change of supplier (CoS) request where this 'flag' has been raised.

Debt Flags	Electricity Market					Gas Market				
	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Total Debt Flags	1,017	1,308	1,393	1,028	1,188	101	237	318	178	174
Debt Flagged CoS request as % total CoS	1.62%	1.86%	2.14%	1.73%	1.93%	0.38%	0.90%	1.17%	0.63%	0.57%
% of Debt Flagged CoS orders Cancelled by New Supplier	56.6%	51.5%	42.4%	31.3%	23.1%	47.5%	50.6%	49.7%	59.0%	59.8%

Table 7 Debt Flagging in Electricity & Gas

- There were 1,188 debt flags raised in the electricity market in Q1 2013 (corresponding to approximately 1.93% of all CoS requests). This represents an increase of 15.6% since Q4 2012. 23% of all debt flagged CoS requests were cancelled by the new supplier in Q1. This represents a reduction of 8.2% in the number that were cancelled in Q4 2012.
- There were 174 debt flags raised in the gas market in Q1 2013 (corresponding to 0.57% of gas switches). This represents a decrease of 2% since Q4 2012. Approximately 60% of debt flagged CoS requests were cancelled by the new supplier in Q1. This represents a slight increase in the number cancelled since Q4 2012.

4.3 Non-Payment of Account Disconnections

The disconnection of a customer's energy supply should always be the last resort and all suppliers are required to offer a payment plan and prepayment solution to customers in advance of proceeding to disconnect. This section analyses trends in disconnections for reasons of non-payment of account (NPA) in both electricity and gas.

4.3.1 Electricity Disconnections

Total Electricity Disconnections	**Electric Ireland**	**Airtricity**	**Bord Gáis Energy**	**Energia**	**Total Disconnections**	**% Of total that are in the domestic market**
Q1 2011	2,051	699	406	142	**3,298**	77.26%
Q2 2011	2,389	1,477	355	182	**4,403**	80.40%
Q3 2011	2,894	2,277	727	243	**6,141**	84.09%
Q4 2011	1,191	1,940	690	131	**3,952**	82.39%
Q1 2012	887	2,658	1,325	193	**5,063**	82.50%
Q2 2012	1,248	1,276	892	194	**3,610**	82.08%
Q3 2012	1,971	1,436	649	125	**4,181**	83.58%
Q4 2012	3,091	740	614	140	**4,585**	87.50%
Q1 2013	1,105	991	429	166	**2,691**	74.92%
% Change Q1 2012-Q1 2013	*+24.58%*	*-62.72%*	*-67.62%*	*-13.99%*	***-46.85%***	

Table 8 Total Electricity Disconnections by Supplier

Domestic Disconnections	Electric Ireland	Airtricity	Bord Gáis Energy	Total
Q1 2011	1,740	532	276	**2,548**
Q2 2011	2,125	1,265	150	**3,540**
Q3 2011	2,629	2,009	526	**5,164**
Q4 2011	1,076	1,668	512	**3,256**
Q1 2012	693	2,326	1,158	**4,177**
Q2 2012	1,073	1,152	738	**2,963**
Q3 2012	1,707	1,259	530	**3,496**
Q4 2012	2,863	641	508	**4,012**
Q1 2013	859	860	297	**2,016**
% Change Q1 2012- 2013	*+23.95%*	*-63.03%*	*-74.35%*	***-51.74%***

Table 9 Domestic Electricity Disconnections by Supplier

- In Q1 2013, there were 2,691 disconnections for non-payment of account in the electricity market.
- Almost 75% of these were in the domestic market.
- There was a significant reduction in the number of electricity disconnections in Q1 2013 compared to Q1 2012 (of -46.9%). Data also shows a significant decrease in the number of disconnections since Q4 2012.
- In Q1 2013 Airtricity completed almost the same number of disconnections as Electric Ireland in the domestic market. When adjusted for market share in the domestic market, Airtricity had the highest disconnection rate per 10,000 customers. Electric Ireland continues to have the lowest rate and Bord Gáis Energy's disconnection rate has significantly reduced in Q1 2013.

Domestic Disconnection Rate	Electric Ireland	Airtricity	Bord Gáis Energy
Q1 2011	13.77	17.16	6.22
Q2 2011	16.90	38.96	3.45
Q3 2011	20.59	58.52	13.23
Q4 2011	8.41	47.02	13.39
Q1 2012	5.39	64.04	31.70
Q2 2012	8.30	31.59	20.99
Q3 2012	13.12	34.50	15.67
Q4 2012	21.94	17.56	15.46
Q1 2013	6.61	23.16	9.36
% Change Q1 2012 - 2013	+22.8%	-63.8%	-70.5%

Table 10 Domestic Electricity Disconnections per 10,000 Customers

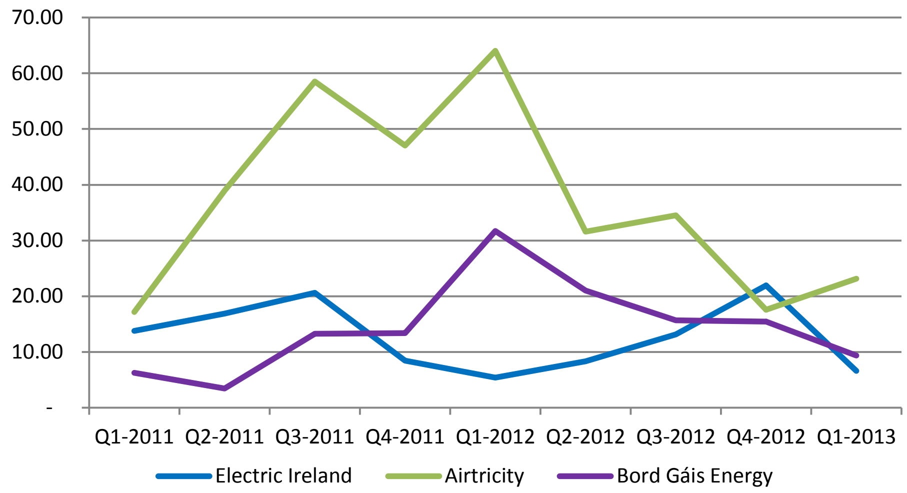


Figure 7 Domestic Electricity Disconnections per 10,000 Customers

4.3.2 Gas Disconnections[10]

Total Gas Disconnections	Bord Gáis Energy	Airtricity	Flogas	Energia	Electric Ireland	Total Disconnections	% Of total that are in the domestic market
Q1 2011	479	28	55	34	-	**596**	77.68%
Q2 2011	1,104	48	99	46	-	**1,297**	80.57%
Q3 2011	1,403	136	244	35	1	**1,819**	89.22%
Q4 2011	643	128	56	21	-	**848**	84.67%
Q1 2012	1,342	189	153	21	1	**1,706**	90.39%
Q2 2012	1,815	283	274	10	5	**2,387**	91.6%
Q3 2012	1,803	480	165	9	22	**2,479**	95.8%
Q4 2012	543	305	106	13	19	**986**	91.6%
Q1 2013	338	351	137	23	11	**860**	88.8%
% Change Q1 2012-Q1 2013	*-74.8%*	*+85.7%*	*-10.5%*	*+9.5%*	*+1000%*	***-49.6%***	

Table 11 Total Gas Disconnections by Supplier

Domestic Disconnections	Bord Gáis Energy	Airtricity	Flogas	Electric Ireland	Total Domestic
Q1 2011	381	28	54	-	**463**
Q2 2011	904	47	94	-	**1,045**
Q3 2011	1,260	134	228	1	**1,623**
Q4 2011	547	124	47	-	**718**
Q1 2012	1,217	187	137	1	**1,542**
Q2 2012	1,646	276	261	4	**2,187**
Q3 2012	1,726	471	155	22	**2,374**
Q4 2012	490	303	91	19	**903**
Q1 2013	288	338	127	11	**764**
% Change Q1 2012 - 2013	*-76.34%*	*+80.75%*	*-7.3%*	*1000%*	*-50.45%*

Table 12 Domestic Gas Disconnections by supplier

Domestic Disconn rate	Bord Gáis Energy	Airtricity	Flogas	Electric Ireland
Q1 2011	7.54	2.80	29.72	0.00
Q2 2011	18.61	4.28	51.63	0.00
Q3 2011	26.89	11.57	112.50	0.47
Q4 2011	11.98	10.44	20.54	0.00
Q1 2012	27.24	15.78	53.39	0.27
Q2 2012	37.64	24.04	96.34	0.81
Q3 2012	40.42	42.47	54.41	3.53
Q4 2012	11.84	28.04	29.85	2.43
Q1 2013	7.19	31.28	40.41	1.21
% Change Q1 2012- 2013	*-74%*	*+98%*	*-24%*	*+350%*

Table 13 Domestic Gas Disconnections per 10,000 Customers

[10] This data relates to disconnections that were undertaken for NPA reasons. It includes all credit locks, and NPA street isolations (CTSRs) and disconnect meters (DMs).

- In Q1 2013, there were 860 NPA disconnections in the gas market.
- Over 88% of these were in the domestic market.
- There was a significant reduction in the number of gas disconnections in Q1 2013 compared to Q1 2012, primarily driven by a reduction in disconnections of Bord Gáis Energy customers.
- In Q1 2013 the majority of domestic disconnections were of Airtricity gas customers. However when adjusted for market share, Flogas has the highest disconnection rate per 10,000 customers and Electric Ireland has the lowest.

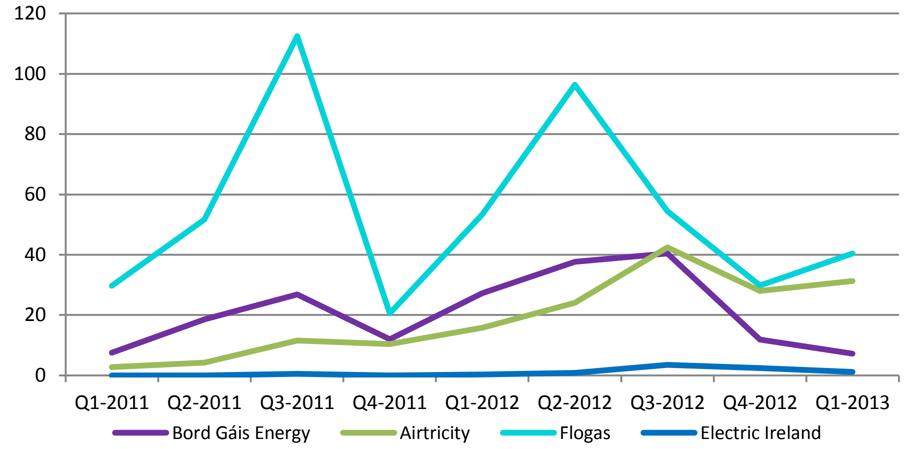


Figure 8 Domestic Gas Disconnections per 10,000 Customers