



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Federal Electricity Commission ElCom

An aerial photograph of a large dam and power plant complex. The dam is a long, white structure with a red roof, situated on a river. To the right of the dam is a large, white, multi-story building with a red roof, likely the power plant. The surrounding area is lush green with trees and fields. In the background, there are rolling hills covered in dense forest. The sky is clear and blue.

ElCom in 2025: A brief overview

Facts & figures

50

employees

19

women

5

interns are employed

11

cantons represented on the staff

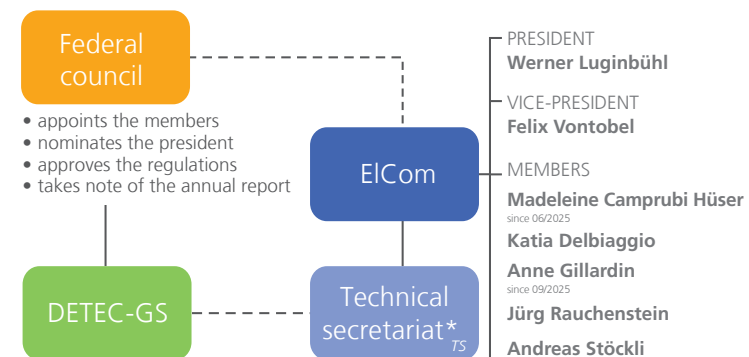
46

average staff age

What is ElCom?

ElCom is the Federal Electricity Commission, comprising seven members supported by a Technical Secretariat. As the regulatory authority for the electricity sector, it oversees grid fees and basic supply energy prices, monitors the security of electricity supply, and proposes measures to the Federal Council if shortages are expected in the medium to long term. It also regulates national and international electricity transmission and trading.

The seven members of the Commission are appointed by the Federal Council. They are independent of the electricity industry and hold their positions on a part-time basis. The Commission is not subject to instructions from the Federal Council or any other authority. It is supported by a Technical Secretariat in Bern, headed by Urs Meister. ElCom's staff of approximately 50 prepare its casework and draft its decisions.



* Administratively linked to the general secretariat of Department of the Environment, Transport, Energy and Communications

Who supplies Switzerland with electricity?

Switzerland has around 580 distribution network operators, whose role is to operate the networks and ensure that customers receive their electricity supply. The sector is extremely diverse: while the 23 largest network operators each supply more than 50 000 end users, the average operator supplies just under 1700 – and some fewer than ten. The ten largest network operators account for over 52 per cent of total energy distributed.

Where does electricity come from?

Switzerland's electricity market is split in two: the open market and the regulated basic supply. Since 2009, only large consumers using at least 100 000 kWh per year are free to choose their electricity supplier. Consumers using less than 100 000 kWh – virtually all private households and many businesses – do not have a choice: they are tied to the basic supply from their local network operator.

Around 55 per cent of end consumption is by customers in the basic supply segment. Production and distribution of electricity for basic supply are quite distinct: most network operators generate little or none of the electricity they sell. Overall, network operators cover only around a third of their basic supply from their own production; the rest is purchased on the wholesale electricity market.

Key topics in 2025

Security of electricity supply and reserves

In May 2025, ElCom published an analysis of the security and resilience of the electricity system through to 2030 and 2035. The findings show that significant uncertainties remain regarding the expansion of renewables, the operating lifetime of nuclear power plants, trends in consumption and import capacity. ElCom therefore continues to recommend holding reserves as a form of insurance, with a minimum of 500 MW for 2030 and between 700 and 1400 MW for 2035. The need for additional reserves beyond this by 2035 cannot be ruled out, particularly in a scenario where import capacity is severely constrained.

Given the wide range of uncertainties over this timeframe, ElCom continuously monitors developments and reviews its analysis and reserve recommendations accordingly.

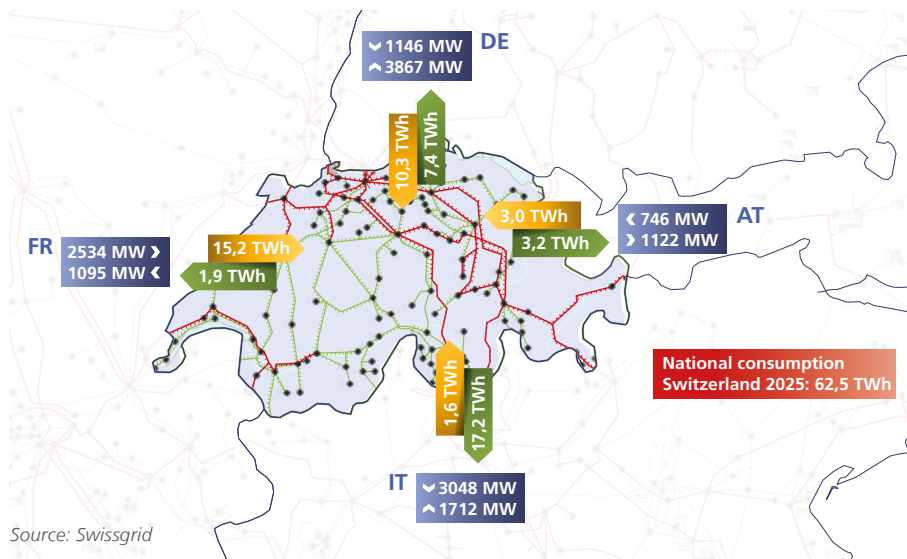
International

Cross-border electricity trading is critically important for both the economy and security of supply. For a small country such as Switzerland, the ability to import electricity is a crucial safeguard. If Switzerland had to be entirely self-sufficient at all times, it would need far greater domestic production or reserve capacity. The winter of 2025/26 – when the Gösgen nuclear power plant went offline – illustrated just how important import capacity is. Adequate cross-border grid capacity (net transfer capacity: NTC) is therefore essential, and depends on Switzerland's transmission network being included in the capacity calculations for the CORE region (Central Europe).

ElCom approved a technical agreement with neighbouring countries at the end of 2024, but the planned improvements did not materialise. Instead, only a scaled-back interim solution is being put in place from early 2026, which improves Switzerland's grid security but still falls short of a joint capacity calculation with neighbouring transmission system operators. Switzerland thus remains structurally excluded from the European optimisation process.

Energy imports and exports

- Extra-high-voltage power grid: 380 kV
- High-voltage power grid: 280 kV



Source: Swissgrid

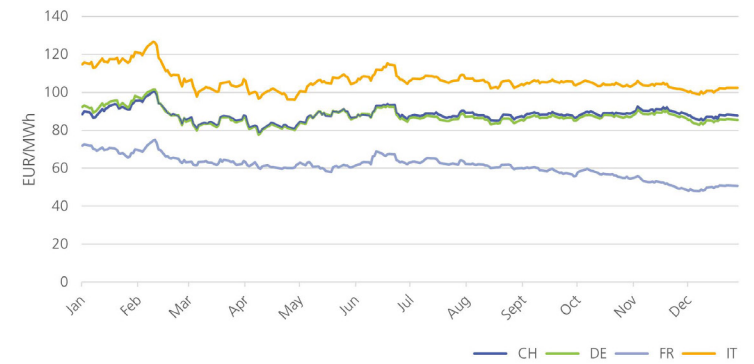
In the diagram, the values shown in the yellow arrows indicate energy imported into Switzerland from the country in question, while the green arrows indicate energy exported from Switzerland. The blue boxes show import and export capacity (NTC, annual average in MW).

Market developments and measures

In 2025, ElCom published a detailed analysis of market conditions during the energy crisis of summer 2022. The findings suggest that the Swiss market proved ill-equipped to withstand such a period of stress, owing to limited liquidity – itself a consequence of the market's small size, the relatively low number of players and Switzerland's limited market integration with Europe. The general breakdown of market and competition mechanisms during the crisis appeared particularly pronounced in Switzerland, which is likely to have amplified the exceptional price increases seen at that time.

Wholesale prices in 2025 remained relatively high compared to the years before 2022.

Market trends



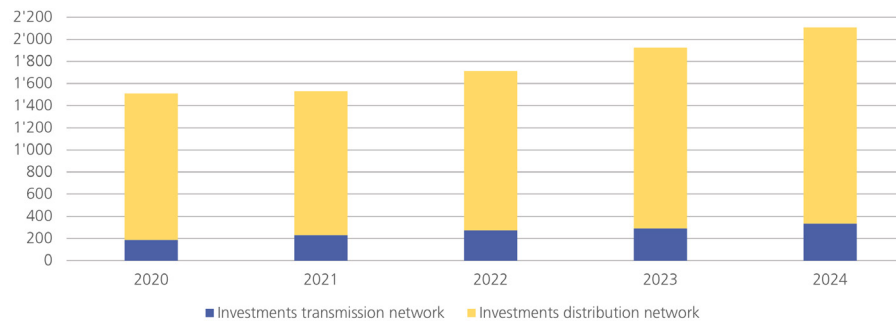
The chart shows the trend in wholesale prices for 2025 throughout 2025 for delivery destinations in Switzerland, Germany, France, and Italy.

Grid expansion

Swissgrid anticipates a significantly increased need for renewal of the transmission network in the coming decades, given the age of existing infrastructure. This is leading to a sharp rise in the number of power line projects and associated approval proceedings, frequently resulting in delays to maintenance and replacement projects essential for reliable and safe grid operation.

The parliament is currently working on measures to streamline approval procedures for grid upgrades and expansion. Demands on the grid are likely to continue growing, driven by the expansion of solar photovoltaic generation, the electricity needs of electric vehicles, and the increasing connection of battery storage systems and data centres.

Investments in networks



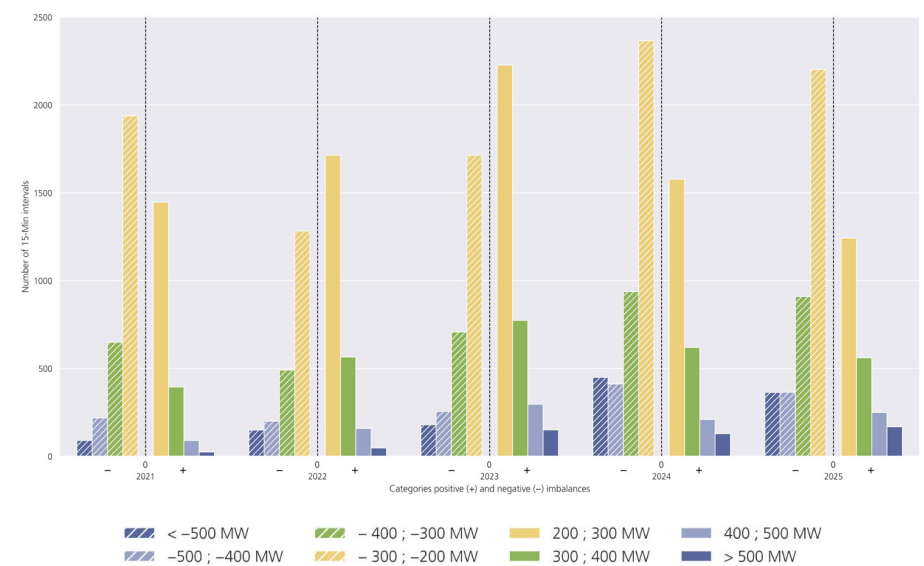
The diagram shows investment in the distribution and transmission networks in Switzerland over the past five years, with actual values for 2020 to 2024; figures for 2025 will be available from 2027.

Growing imbalances

Balancing energy is used to maintain stability in the electricity grid. In recent years, the Swiss control zone has faced increasing imbalances: incorrectly forecast supply and demand have to be offset using costly balancing energy. For now, these imbalances translate primarily into higher costs, which are billed to consumers as balancing energy charges. However, if imbalances continue to grow, the risks to supply stability will increase accordingly.

A key factor behind forecast deviations is solar PV output, which is harder to predict and requires shorter-term, more localised forecasts. Together with the SFOE and Swissgrid, ElCom has set up a working group to raise awareness among market players and ultimately develop concrete measures to improve the situation. 2025 showed signs of improvement on the previous year.

Evolution of imbalances



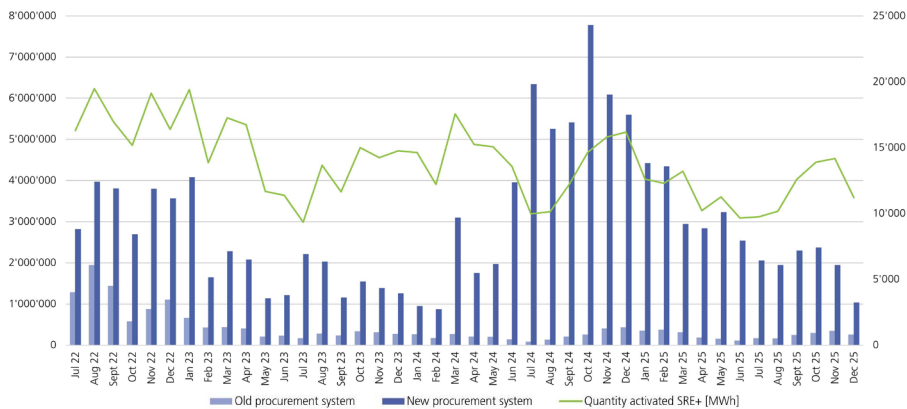
The diagram shows the trend in large positive and negative imbalances over the past five years, measured by the number of 15-minute values. Extreme events ($\pm > 400$ MW) in particular have tended to increase in recent years.

Balancing energy and balancing capacity

Growing imbalances drive up demand for balancing energy, which is categorised by activation time into primary, secondary and tertiary control. Swissgrid procures the necessary capacity and energy through tendering procedures. Following the sharp rise in balancing energy market costs already seen in 2024, ECom continued to monitor price and supply developments in 2025. As a short-term corrective measure, a temporary price cap on secondary control energy (known by the German acronym SRE) of EUR 1000/MWh was introduced in March 2025. ECom's analysis showed that capping price spikes keeps overall costs down.

ECom also commissioned an external study to assess the efficiency of the SRE market and evaluate measures to improve market design and procurement mechanisms. The study found an extremely high degree of market concentration and recommended maintaining the price cap until more far-reaching measures take effect. Following a recommendation from ECom, market players and Swissgrid agreed on a contractual basis to extend the price cap until the end of 2026.

Secondary balancing energy: price and call volume



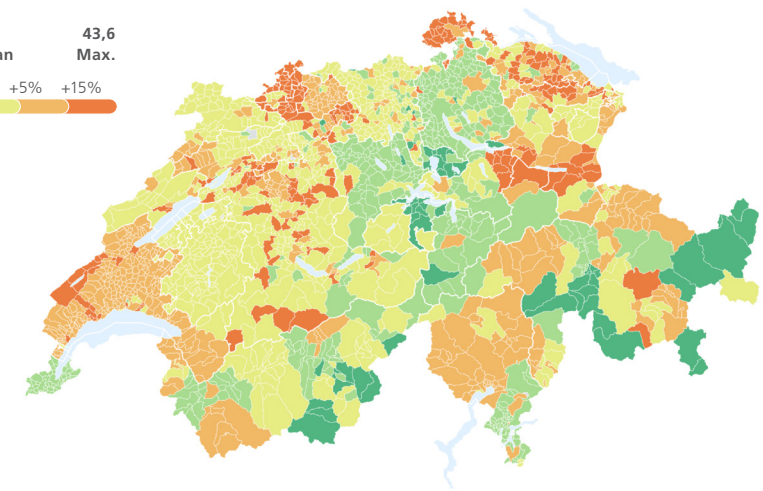
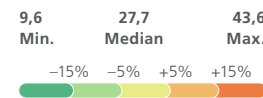
In average monthly prices for positive secondary control energy (SRE+) in EUR/MWh under the current and previous systems. The green line shows the volume of SRE+ called up in MWh. The introduction of the price cap led to lower costs from March 2025 onwards, with call-up volumes remaining broadly stable.

Tariffs

By 31 August 2025, Switzerland's approximately 580 network operators were required to notify both their customers and ECom of their electricity tariffs for the coming year. A typical household will pay 27,7 centimes per kilowatt hour (ct/kWh) in 2026 – a reduction of 13 ct/kWh on the previous year, driven mainly by lower energy prices.



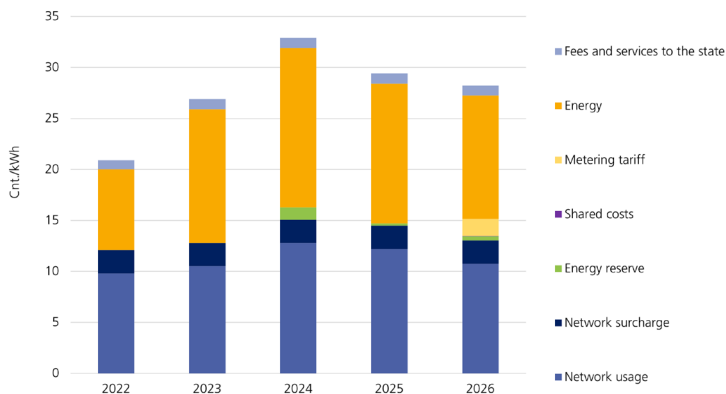
Electricity prices Switzerland



The 2026 tariffs will for the first time include shared costs relating to connection reinforcements and transitional assistance for iron, steel and aluminium producers. In addition, the metering tariff will be shown as a separate line item; previously it was included in the network usage tariff, so this does not in principle represent an additional burden for end users. From 2026, network operators will also introduce dynamic tariff models more widely, which can help improve network utilisation and thereby reduce the need for grid expansion.



Cost components for electricity



A core task of ElCom is overseeing network operators' tariffs. In this context, a Federal Supreme Court ruling of 3 December 2025 is worth noting, which confirms ElCom's practice regarding the calculation of energy costs that may be charged within energy tariffs. Profit transfers exceeding the regulated return may not be declared as part of energy costs and added to basic supply tariffs.

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ElCom's electricity price comparison website: www.strompreis.elcom.admin.ch