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Directorate for Financial and Enterprise Affairs
COMPETITION COMMITTEE

Annual Report on Competition Policy Developments in Norway

-- 2024 --

This report is submitted by Norway to the Competition Committee FOR INFORMATION.

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Norway

Executive summary

1. The goal of competition policy in Norway is to promote competition and efficient use of society's resources, thus stimulating productivity and innovation to the benefit of consumers and businesses. An integral part of this policy is to ensure that markets function well, allowing businesses to compete on equal terms and offer better products and services. Ultimately, this contributes to increased value creation and sustainable use of resources.
2. Several important legal and policy developments occurred in 2024. To ensure a modern and future-proof competition policy, the Government appointed an expert committee in September 2024 to conduct a comprehensive review of the Competition Act. The review will consider developments in EU/EEA competition law, sustainability, digitalisation and national security. The committee is expected to deliver its report 1. December 2025.
3. A regulation prohibiting the use of restrictive covenants that prevent the establishment of grocery stores came into effect on 1 January 2024. The regulation applies to new covenants from that date and is intended to reduce barriers to entry by addressing the grocery chains' use of legal restrictions on competing retail activity.
4. In December 2024, the Norwegian Parliament adopted an amendment to the Competition Act granting the Norwegian Competition Authority (NCA hereafter) a new enforcement tool – market investigation – which will be used to improve competition and increase consumer welfare. The new provisions will enter into force 1 July 2025. Currently, the NCA can only intervene in cases involving a breach of the Competition Act. Market investigation changes this by allowing the Authority, following a thorough investigation, to adopt behavioural or structural remedies to strengthen competition if serious competition problems are identified.
5. The NCA enforces the Competition Act and supervises competition in various markets. Important tasks for the NCA in this regard are effective enforcement of the prohibitions against anti-competitive agreements and abuse of dominant position in the Competition Act, merger control and active advocacy work. The NCA also endeavours to be a centre of competence in competition-related matters.
6. In its work to control and assess concentrations, the NCA carefully reviews mergers and acquisitions that might impede effective competition. In 2024, the Authority received and assessed 151 merger notifications, of which 97 percent were cleared within 25 working days.
7. Some of the more important merger cases, potential abuse of dominance and cartel cases are mentioned in this report.
8. The grocery sector in Norway has a high degree of concentration in most parts of the value chain. This sector has therefore been a priority for the Norwegian Government and the NCA for several years. The Government has implemented several measures, and is considering additional ones, to strengthen competition in this sector. Examples are assessments of private labels and the supply of wholesale and distribution services. The NCA's activities include enforcement, market analyses, and various forms of advocacy to strengthen competition in the grocery sector.

9. Notably, in August, the NCA concluded the so-called ‘price hunter case’ by imposing a total of NOK 4.9 billion (USD 462 million)¹ in fines on the three largest grocery chains in Norway, NorgesGruppen, Coop and Rema 1000 for breaching the Competition Act. The Authority found evidence that the grocery chains’ cooperation on extensive price monitoring in each other’s stores was illegal.

10. As part of its broader efforts to promote competition in the grocery sector, the Government tasked the NCA in 2023 with analysing purchasing prices, gross and operating margins, and profitability across the sector’s industry-, wholesale- and retail level. The analysis, presented in June 2024, showed a continued narrowing of differences in purchasing prices. The findings revealed no evidence that grocery retailers had exploited the COVID-19 pandemic or the war in Ukraine to increase prices. However, the analysis did indicate that profitability remains higher than would be expected in a market characterized by strong competition.

11. The NCA’s Grocery Report for 2023 provides a broader assessment of the competitive situation in the market. The report, which was presented in early 2024, attracted significant media attention. Among other things, it evaluates the grocery chains’ store establishment strategies and the degree of local competition.

12. By the end of 2024, the NCA had a total of 99 employees, including staff on temporary leave.

13. In February 2025, Gjermund Nese was appointed Acting Director General of the NCA.

1.1. Summary of new legal provisions of competition law and related legislation

14. **Market investigation.** In December 2024, the Norwegian Parliament adopted legislative amendments establishing a legal framework for market investigations in the Competition Act. The new provisions, which will enter into force on 1 July 2025, will give the NCA a new legal instrument to address serious competition concerns, even in the absence of an infringement of competition law. The new instrument draws inspiration from corresponding frameworks in the UK and Iceland, and it supplements the existing enforcement instruments in the Norwegian Competition Act. It is intended to address broader market dysfunctions, not just focusing on anti-competitive behaviour by individual companies.

15. The new provisions will enable the NCA to initiate a market investigation if there are indications that competition within a market is, or is at risk of, being significantly restricted. A draft decision to conduct a market investigation shall be subject to a public hearing before a final opening decision may be adopted by the NCA. Following a thorough analysis of the competitive conditions in the market in question the NCA may, if it finds that the competition is significantly restricted or at risk of being significantly restricted, impose any behavioural or structural remedies considered necessary to eliminate or mitigate the restrictions. Any measures must be proportionate and not go further than necessary.

16. Market investigations can be used in any sector. There are, however, extensive exemptions applicable to the agriculture and fisheries sectors, analogous to those established for the prohibitions on anti-competitive agreements and the abuse of a dominant position.

¹ The exchange rate in this document is per 19. March 2025.

17. A decision made by the NCA imposing remedies in conclusion of a market investigation can be challenged before the Norwegian Competition Tribunal.

18. **Interest on administrative fines.** The Ministry of Trade, Industry and Fisheries adopted a regulation on the accrual of interest on administrative fines for infringements of the Competition Act. The regulation supplements Section 29 (5) of the Act, and applies retroactively from 1 January 2023. The regulation aims to strengthen the effectiveness of the Act by incentivising undertakings to pay fines on time. It also ensures more equal treatment between undertakings and the state by entitling undertakings to interest payments in cases where an imposed fine is later reduced or annulled following an appeal or court decision. The regulation is aligned with similar rules under EU/EEA. A new regulation which clarifies the rules related calculation and payment of interest was adopted in November 2024, and retroactively entered into force January 2023. The regulation clarified the Government's obligation to repay collected fines to the undertakings with interest if the fine is reduced or repealed after payment is made.

1.2. Other relevant measures, including new guidelines

19. **Regulation on prohibition of the use of restrictive covenants that limit the establishment of grocery businesses.** In January 2024 a new regulation came into force that applies to the establishment of new restrictive covenants from that date and does not cover covenants already in place prior to the regulation's entry into force. The regulation is primarily intended to cover covenants that restrict the establishment of grocery operations on properties owned by others. Such rights are typically established through leasing agreements or purchase.

20. In 2024, the NCA conducted new analysis to map the extent of restrictive covenants used by the grocery chains. It included the covenants established by companies that directly or indirectly control, or are controlled by, NorgesGruppen, Rema, Coop and Bunnpris. The investigations revealed that the market players held restrictive covenants established before the regulation took effect, and that there were some plans to remove them. Some actors had already started the process of removing the covenants after being called out by the NCA. Furthermore, the investigation found that several partners of the grocery chains have imposed restrictive covenants in favour of the grocery chains. As access to suitable premises constitutes a significant barrier to entry in the grocery market, the NCA will continue its efforts to gain a better overview of the chains' control over properties that may be used for grocery shops.

21. No new guidelines were introduced in 2024.

1.3. Government proposals for new legislation

22. **Expert committee to review and modernise the Competition Act.** In September 2024, the Government appointed an expert committee to conduct a comprehensive review and modernisation of the Competition Act, which has been in force since 2004 and was last the object of an extensive review more than a decade ago. The aim of the review is to ensure that the competition legislation remains an effective instrument, and is aligned with broader developments in case law, EU/EEA competition policy, and societal and market trends.

23. The committee has been tasked with undertaking a holistic revision of the legal framework to reflect significant economic and structural changes, particularly those driven by digitalisation, which has led to more complex and wide-ranging competition cases. Other key issues that will be assessed include:

- Review the objective of the Competition Act in light of developments in national and EU/EEA competition policy
 - Potential amendments to the merger control regime, including whether rules to safeguard specific societal interests such as national security, geopolitical considerations and sustainability should be enacted
 - The functioning of the Competition Appeals Tribunal and the broader appeals system
 - Potential improvements to procedural rules and amendments to the sanctions for breach of the Act
 - Potential amendments to section 14 of the Act, which gives the Government authority to adopt regulations restricting anti-competitive terms, agreements and conduct
24. The committee is led by Kristin Hjelmaas Valla, partner in the law firm Kvale, and is composed of legal and economic experts from both academia and private practice. One member has been nominated by each of the following: the NCA, the Confederation of Norwegian Enterprise (NHO), and the Norwegian Confederation of Trade Unions (LO). The committee will deliver its recommendations in an Official Report (NOU) to the Ministry of Trade, Industry and Fisheries by December 2025.

2. Enforcement of competition legislation/rules and policies

25. According to the Competition Act, the primary responsibilities of the NCA are as follows:
- Monitor adherence by businesses and industry to the Competition Act's prohibitions against anti-competitive cooperation and abuse of a dominant position
 - Ensure that mergers, acquisitions, and other forms of concentrations do not significantly restrict competition
 - Implement measures to increase the transparency of markets
 - Enforce Articles 53 and 54 of the EEA Agreement
 - Call attention to any restrictive effects on competition of public measures and, where appropriate, submit proposals to the relevant public authorities aimed at promoting competition and facilitating market access by new competitors
26. The NCA may impose civil sanctions in the form of administrative fines on undertakings that infringe the competition rules. In addition, the Competition Act includes provisions on penalties for individuals. However, no individuals have been penalised pursuant to the Competition Act as of 2004.

2.1. Action against anticompetitive practices, including agreements and abuse of dominant position

2.1.1. Summary of activities

27. The Authority endeavours to work broadly, with various types of cases in a diverse range of markets of importance to the Norwegian consumers.

28. Tip-offs, complaints, and leniency applications are important to ensure the greatest possible direct and indirect effects of enforcement. Through targeted informational measures, the NCA has experienced an increase in tip-offs related to possible infringement of the Competition Act.

29. Moreover, the NCA has adopted a more proactive approach to uncovering cartels. Several projects on uncovering cartels ex officio have been initiated since 2017. In addition, the NCA aims at utilizing the possibilities that digital tools provide, using new sources and methods for data analysis for the detection of cartels.

30. A summary of activities is presented below.

Table 2.1. Investigative Work Activities 2014-2024

Cases / locations	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Securing evidence, cf. section 25 of the Competition Act	1/2	1/3	3/3	2/10	2/6	1/2	2/8	3/11 ²	0	1/4
Depositions (formal statements), cf. section 24 of the Competition Act	5/45	4/17	4/20	4/34	6/39	3/6	0	1/5	4/14	1/2

31. The Norwegian Competition Act has had provisions on leniency since 2004. The threshold for seeking leniency appears to be relatively low, and some of the NCA's larger cases were instigated by leniency applications. However, surveys in previous years have indicated a lack of knowledge about the possibility to apply for leniency among business leaders in Norway. To address this, the NCA has intensified its communication efforts through media channels regarding the leniency programme and the possibility for anonymous tip-offs.

32. In 2024, the NCA received 33 tip-offs concerning competition-restricting public measures which were subject to further examination. These tip-offs contributed to the NCA's ability to carry out the tasks under Section 9 e of the Competition Act, which involves pointing out competition-restricting effects of public measures. If required by the NCA, the body responsible for the measure shall respond to the NCA within a specified deadline. The response shall, among other things, explain how competitive considerations will be addressed.

33. Additionally, the NCA received 455 tip-offs concerning possible infringements of Sections 10 and 11 of the Competition Act, which address illegal cooperation between undertakings and abuse of a dominant position, respectively.

34. To further evaluate the follow-up of received tip-offs, an internal tip-off group has been established with participants from the NCAs three market departments.

2.1.2. Description of significant cases, including those with international implications

35. **Market for driving training.** In November 2024, the NCA carried out unannounced inspections at several driving schools based on a suspicion of illegal collaboration in violation of Section 10 of the Competition Act. The inspections aimed to

² The number is different from the previous annual report because evidence collection in one case was counted twice.

confirm or reject this suspicion. The district court approved the NCAs petition to collect evidence (dawn raid), and relevant material was seized for further examination.

36. **Market for relocation services.** In September 2021, the NCA started an investigation among undertakings in the market for relocation services. In April 2024, the NCA issued a statement of objections in the case.

37. **Market for financial services.** In February 2022, the NCA carried out unannounced inspections (dawn raid) at KLP due to suspicion of a violation of Section 11 of the Competition Act, which pertains to abuse of a dominant position in the market. KLP plays a crucial role in providing pensions for over 900 000 Norwegian consumers in the public sector. The company's total managed assets range between NOK 700 billion and 1 trillion (66 billion to 94 billion USD), depending on the time period. The suspicion relates to KLP's possible anticompetitive conduct in the market for occupational pensions. Relevant materials were seized to confirm or reject the suspicion of a breach of the prohibition against abuse of dominant position in section 11 of the Competition Act. The investigation is ongoing.

38. As part of the case, the NCA has sought legal clarification of the scope of legal privilege under the Competition Act for documents prepared by in-house lawyers. The case is scheduled to be heard by the Court of Appeal in late April 2025.

39. **Health-related market.** In May 2021, the NCA initiated an investigation, and conducted a dawn-raid at the facilities of the undertakings involved. The investigation was based on suspicion relating to illegal exchange of competition-sensitive information between the parties, in violation of Section 10 of the Competition Act. After thorough investigation, the NCA did not find sufficient grounds to take the case further and decided to close the investigation in June 2024. However, the Authority will continue to monitor the market closely, as it consists of a limited number of players with strong positions across multiple levels of the value chain.

40. **'Price hunters' in the grocery market.** The NCA has prioritised monitoring competition in the grocery market for many years. The market is highly concentrated both at the wholesale and retail level. Competition challenges in this market have a significant impact on Norwegian consumers, as it is crucial to avoid unnecessary price increases. In 2023, the NCA continued its investigations in the grocery market, assessing the substantial materials seized in a dawn raid conducted in 2018. The core of the case relates to an agreement between the grocery chains, which allowed them to access each other's stores to collect shelf price information for use in comparative advertising. The NCA learned that each chain had developed an organisation of 'price hunters' to collect prices from competing grocery stores.

41. Following increased activity of 'price hunting', the NCA examined the grocery chains' pricing and information flows in 2016, including the practice of collecting price information from competing stores. That examination led the Authority to conduct unannounced inspections at NorgesGruppen, Coop, Rema 1000 and Bunnpris' premises in 2018 on the suspicion of exchange of strategic information between these grocery chains. After further investigation, the NCA decided not to proceed with the case against Bunnpris.

42. In December 2020, the NCA issued a statement of objections stating that it considered imposing fines totalling NOK 21 billion (USD 1.9 billion) on NorgesGruppen, Coop and Rema 1000. The NCA suspected that the grocery chains violated the prohibition against anti-competitive cooperation. The preliminary assessments indicated that the grocery chains had cooperated in a manner that may have led to higher grocery prices for Norwegian consumers. The parties submitted their responses in late February 2022.

43. In February 2024, the NCA dropped the accusation that the price hunter activities constituted a restriction of competition by object. However, the NCA continued investigating whether the collaboration restricted competition by effect – a less serious offence.

44. In August 2024, the NCA concluded that the collaboration between the NorgesGruppen, Coop and Rema 1000 constituted an infringement of the Competition Act and imposed fines totalling NOK 4.9 billion (USD 462 million). The investigation found that the grocery chains' cooperation in allowing extensive price-tracking activities in each other's store harmed competition by increasing price transparency between competitors without providing benefits to consumers.

45. The alleged illegal cooperation lasted from January 2011 until at least April 2018, when the NCA conducted dawn raids at the grocery chains' offices. During this period, price-tracking activities intensified, allowing the chains to track competitors prices multiple times per day. The investigation found that this practice contributed to reduced price competition, as grocery chains could anticipate competitors' price reactions, making price increases more attractive and price reductions less effective.

46. The following fines were imposed: i) NorgesGruppen NOK 2.3 billion (USD 216.2 million), ii) Coop NOK 1.3 billion (USD 122.2 million), iii) Rema 1000 1.3 billion (USD 122.2 million).

47. The grocery chains were also ordered to cease cooperation and any similar practices with equivalent effects.

48. The NCA decision has been appealed to the Competition Appeal Tribunal.

2.1.3. Summary of development in cases that were appealed

49. The NCA's decisions to impose administrative fines can be appealed to the Competition Appeal Tribunal. The Tribunal shall consider appeals against all decisions pursuant to the Competition Act, i.e. rulings in merger cases, fines for abuse of dominance and collusive behaviour, as well as decisions relating to access to file and duty to provide information. Decisions by the Competition Tribunal may be appealed to the designated appeals court, Gulating Appeals Court, and ultimately to the Supreme Court.

50. A legislative amendment which entered into force in July 2023 grants the NCA the right to appeal decisions by the Tribunal in cases regarding anti-competitive collusion (section 10), abuse of dominant position (section 11), obligation to cease anti-competitive conduct (section 12), regulations adopted by the Government pursuant (section 14) and article 53 and 54 of the EEA agreement, cf. section 39 nr. 6. The NCA did not appeal any cases in 2024. The NCA cannot appeal the Tribunal's decisions in merger cases.

2.2. Mergers and acquisitions

51. An important task for the NCA is to assess and prohibit concentrations that will significantly impede effective competition. To fulfil this task, the NCA has been equipped with three different tools: i) the general notification rules for transactions exceeding the thresholds, ii) the extended duty to provide information regarding transactions and iii) the power to impose notification requirements on any transactions or minority acquisitions (call-in option).

52. The first tool is the most important in merger control, according to which the acquirer of control or merging parties have a duty to notify the NCA about any concentrations, such as mergers, acquisitions, agreements and full-functioning joint

ventures by which they acquire control of other undertakings, if the combined annual turnover of the undertakings concerned exceeds NOK 1 billion (USD 94 million) in Norway.

53. The NCA can impose an extended disclosure requirement on certain undertakings in sectors and industries that are characterised by structural issues and a high degree of concentration. The requirement entails that the undertaking is required to inform the NCA when they acquire control of or merge with another undertaking operating in specified markets or industries, even if the notification thresholds are not exceeded. For some undertakings, the disclosure requirements also cover acquisition of minority shareholdings. A breach of the requirement can be sanctioned with an administrative fine. The NCA may use the call-in option to impose a duty to file a merger notification if it finds that the transaction should be further examined.

54. The NCA also has the authority to impose a duty to notify any concentration or a minority acquisition, if it has reason to suspect that the transaction will impact competition or if other factors indicate that the Authority should examine the case more closely (call-in). The NCA must use the call-in option within a deadline of three months from the conclusion of the transaction agreement or acquisition of control. This tool is particularly relevant when analysing established firms that acquire start-ups and in preventing killer acquisitions.

55. If the transaction exceeds the notification thresholds or the NCA has imposed a duty to notify, it is subject to a stand-still obligation until clearance, and the NCA may sanction illegal implementation with an administrative fine.

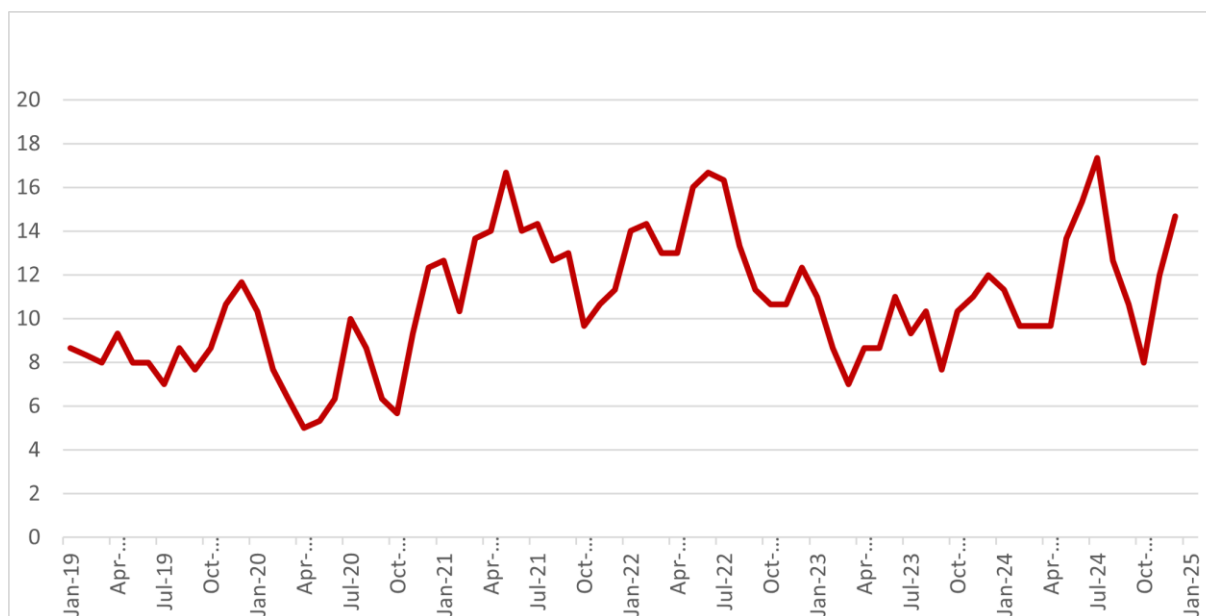
56. In addition to assessing notified mergers, the NCA monitors mergers that previously have been approved with remedies. In most of these cases, a monitoring trustee, appointed by the NCA, ensures that the conditions are met.

2.2.1. Statistics on number, size and type of mergers notified and/or assessed under competition law

57. In 2024, the NCA received 151 notifications, compared to 113 in 2023. Notably, 73 percent of the notifications (111) are so-called simplified notifications, relating to concentrations that are not likely to affect competition negatively.

58. In 2021 and 2022, the NCA received a record number of merger notifications. A plausible explanation for this increase may be that many firms had a difficult time during the pandemic. In 2023, however, the number dropped back to pre-pandemic levels. In 2024 the number of notifications rose again, likely driven by increased economic uncertainty and market adjustments.

Figure 2.1. Notifications of mergers and acquisitions – January 2019 – December 2024 (3 months running average)



59. The NCA aims at managing merger cases efficiently and provide businesses with a speedy resolution. By focusing on front-loading resources in each case, the NCA has been able to handle cases more efficiently, freeing up internal resources for other prioritized cases.

60. Of the 151 notifications of mergers and acquisitions received by the NCA in 2024, 147 were closed within 25 working days, i.e. 97,3 percent. For the NCA, thorough control of concentrations is an important part of its work. Notwithstanding, efficient clearance has proved to be beneficial for the involved parties and contributed to increased predictability and swiftness in the merger control.³

2.2.2. Summary of significant cases

61. The NCA has the power to require businesses in highly concentrated markets, such as power production and the grocery market, to inform the Authority of all acquisitions. By monitoring these markets closely, the NCA can stay informed of new developments and potential competition issues. The NCA periodically evaluates whether such obligations should be imposed on additional market participants. For more information on this subject, see subsection 1.2 and the introduction of subsection 2.2.

62. In April 2024, the NCA assessed the **merger between TGS Newco and PGS**, two companies operating in the market for geophysical services, with a primary focus on seismic data. After issuing a statement of potential intervention and conducting a thorough analysis, the NCA concluded that the merger would not impede effective competition. The case was therefore closed.

63. In September 2024, the NCA prohibited **Norva24 Vest's acquisition of Vitek Miljø**. In August, the NCA issued a notice stating that intervention could be necessary. The decision was based on concerns that the merger would significantly weaken competition in

³ As the NCA receive notifications throughout the year, sometimes there is an overlap over the years when the cases are registered in our systems.

the market for emptying and flushing services in the former Hordaland region. The two companies are already the largest providers of these services in the area and are each other's closest competitors. The acquisition would have led to increased market concentration, reducing competitive pressure, which could have resulted in higher prices and lower service quality for private, public and business customers. In January 2025, the Competition Appeals Board upheld the NCA's decision to prohibit the merger.

64. In November 2024, **Saferoad withdrew its merger notification for the acquisition of Ze Bra Holding**. Both companies operate in the market for road marking. The NCA had issued a notice indicating that intervention could be necessary, as the acquisition could reduce the number of competitors in the market. Saferoad is already the largest player in the market, and the merger could have negatively impacted prices and conditions for the customers. Following these concerns, Saferoad chose to withdraw its notification.

2.2.3. Extended disclosure agreements

65. The aim of the disclosure requirements mentioned in section 2.2 is to prevent acquisitions by large companies of smaller market players that harm competition.

66. In 2024, the NCA imposed disclosure requirements for some new markets and undertakings. Currently, the following markets and undertakings are subject to extended disclosure requirements:

- Motor fuel retailing: Uno-X Mobility, St1 Norge AS, Certas Energy Norway AS, Circle K Norge AS, YX Norge AS
- Electricity generation: Statkraft AS, Eviny AS, Skagerak Energi AS, Å Energi AS and Hafslund Kraft AS
- Waste management and recycling: Norsk Gjenvinning Norge AS
- Grocery store chains: Norgesgruppen ASA, Coop Norge SA, Rema 1000 and Bunnpris IK Lykke AS
- Newspapers: Amedia AS, Polaris Media ASA and Schibsted ASA
- Home security systems: Verisure AS and Sector Alarm Group AS
- Laundry services: Nor Tekstil AS
- Garden centres: Plantasjen Norge ASA
- Suppliers of concrete: Nordic Concrete Group AS, Heidelberg Materials Norway AS and Unicon AS
- Accounting systems: Visma AS
- Online marketplaces: Schibsted ASA
- Charging services for electric cars: Mer Norway AS, Circle K Norge AS, Eviny Elektrifisering AS, Recharge AS and Tesla Norway AS
- Sport equipment: Sport Holding AS

67. The NCA regularly considers whether it is necessary to impose disclosure requirements on other market players.

3. Proposals for regulatory reforms, trade- and industrial policies etc.

3.1. Cooperating bodies

68. The NCA holds regular meetings for information and contact purposes with sector regulators such as the Financial Supervisory Authority of Norway, the Norwegian Communications Authority, the Norwegian Water Resources and Energy Directorate, the Norwegian Consumer Authority, and the Norwegian Consumer Council. The contact with some of these bodies is formalised by cooperation agreements which provide a better framework to exchange information. Meetings are both on regular and ad hoc basis, depending on whether there are cases where both competition policy and sector-based regulations are essential. Moreover, the NCA has continued to maintain good relations with other public institutions throughout 2024.

3.2. International cooperation

69. The NCA prioritizes international cooperation, with the European Competition Network (ECN), Nordic network, the International Competition Network (ICN) and the OECD as the most important networks. The NCA aims to be an active contributor to these networks, submits written contributions for the OECD Competition Committee and presents cases in ECN Working Groups.

70. The Agreement on the European Economic Area (EEA) makes Norway an integral part of the European single market. The EEA links the EU member states and three of the member states of the European Free Trade Association (EFTA) (Iceland, Liechtenstein and Norway) into an internal market governed by the same basic rules. Thus, the agreement entails the free movement of goods, services, capital and persons. The agreement also entails common rules for competition, public procurement and state aid, in order to ensure equal and fair conditions of competition between companies throughout the EEA. As a result of the single market, many cases concerning anti-competitive conduct include companies that operate across borders, affecting consumers in many countries. Thus, active participation in the ECN is particularly important to Norway and the NCA.

71. In its enforcement of the EEA competition rules, the NCA has regular contact with the EFTA Surveillance Authority (ESA) concerning ongoing cases with a cross-border dimension, to ensure consistent application and enforcement of article 53 and 54 of the EEA Agreement (corresponding to TFEU article 101 and 102). In 2021, ESA launched the EFTA Competition Network. The network has also been active with webinars, capacity building seminars and physical meetings on policy-oriented issues in 2024.

72. Another important cooperation arena is the Nordic cooperation, which is formalized in an agreement between the Nordic Competition Authorities and facilitates effective cooperation on cross-border enforcement. The cooperation also comprises informal contact through various networks, a biannual meeting between the DGs and an annual meeting focusing on topical enforcement related issues. In 2024, the annual Nordic meeting between the competition authorities took place in Turku, Finland.

73. In 2024 and 2025 the NCA cooperated with the other Nordic competition authorities in organizing two webinar series, each consisting of four webinars, covering issues decided by the Antimonopoly Committee of Ukraine (AMCU).

74. The NCA is an active participant in the ICN. From 2021 till 2024 the NCA was a co-chair of the ICN Merger Working Group, after having served as a co-chair for its Advocacy Working Group.

75. In addition, the NCA also has informal cooperation with other authorities on a bilateral basis.

3.3. Expressing competition concerns related to existing or proposed regulations

76. According to section 9 of the Competition Act, the NCA shall supervise competition in all markets, by implementing measures to promote market transparency, and by calling attention to any restrictive effects on competition caused by public measures.

77. In this regard, the NCA advocates for changes in regulations in order to facilitate competition through lower entry barriers, new business models, and stronger incentives to compete.

78. Anti-competitive regulations exist in a number of different areas, and the NCA has taken steps to address them. One of these steps is to include a function on the NCA's website that allows the general public to submit encrypted submissions regarding perceived regulatory restrictions on competition. The tip-offs are first reviewed by an internal task-force, and then considered for prioritisation by the relevant market department.

79. Further, it is a key part of the NCA's advocacy efforts to raise awareness of the importance of competition and to influence a competitive culture across markets. The NCA's advocacy efforts are particularly directed towards small and medium sized enterprises, as surveys have documented a clear need for increased awareness of and familiarity with competition law.

80. In 2024, the NCA has been active in its advocacy work and received significant media attention. The Authority continues to be active in the media, explaining the importance of effective enforcement of the competition legislation and its direct impact on consumers. In addition to TV appearances and interviews, the NCA's employees published 11 op-eds on topical issues. Additionally, the NCA released 1 podcast episode and produced 4 webcasts presenting basic knowledge on competition law. These webcasts are particularly relevant for small and medium-sized enterprises.

81. Notably, media analytics and a survey indicate that the NCA has been highly visible in 2024 with 4652 media news items referencing the NCA.

82. As a consultative body in public hearings, the NCA assess if the impact on competition is considered appropriately when new policies are proposed. The Authority prioritises consultations where its influence is most likely to result in a positive outcome for competition. This approach has proven to be effective use of resources. In 2024, the NCA submitted 12 hearing statements to various ministries and authorities regarding proposed legal amendments on a broad range of topics.

83. The Authority has continued to develop separate thematic webpages about prioritized markets or markets in which the Authority has additional tasks. The NCA had developed such thematic webpages for the taxi market, the fuels market, the digital economy, sustainable development and competition, and the grocery market.

4. Resources of the competition authority

4.1. Resources overall

4.1.1. Annual budget

84. The annual budget for the NCA for 2024 was NOK 142.9 million (USD 13.4 million).

4.1.2. Number of employees (person-years):

85. In 2024, the NCA's personnel resources amounted to 87.4 person-years, including administrative staff and PR-staff.

86. Number of employees (not person-years) as per 31 December 2024 amounted to 99 (including staff on temporary leave), including:

- 36 economists
- 34 lawyers
- 3 investigators
- 1 data scientist
- 23 other professionals and support staff (HR, IT and information management, PR/communications, finance, organisation development)

4.2. Human resources (person-years) applied to mergers, anti-cartels, dominance-related issues and advocacy

87. The NCA's case handling is primarily organised around sectors of the economy, with case handlers working in market departments responsible for specific markets. All case handlers work on different types of competition cases within their allocated market department.

88. Specialised legal and economic support along with quality assurance, is provided by the legal director's team and the chief economist's team, respectively.

89. All case handlers may engage in advocacy work. The Department of Communications and PR works closely with other departments to maximize media outreach related to case outcomes and advocacy work.

90. Skill development is a priority for all employees, with the NCA successfully building a staff of highly qualified and experienced case handlers. A key focus in 2024 has been competence development, particularly in leadership at different levels within the organisation and project management.

4.3. Organisational development

91. In 2024, the NCA implemented an organisational restructuring to strengthen competition law enforcement. The investigative department was dissolved, and investigative staff were fully integrated into the market departments. Each market department now has its own dedicated investigation team, ensuring a more comprehensive approach to case handling from case initiation to decision.

92. The restructuring aims to create a more holistic investigation process, with investigators working more closely with case handlers throughout the case lifecycle. The

investigative teams continue to focus on cartel and abuse of dominance cases, as well as international network activities. Additionally, the staff retains specialist knowledge in forensic IT. Developing and integrating investigative expertise across the organisation remains a key priority in 2025, with the full effects of the restructuring expected to be measurable over time.

93. Moreover, the NCA established a new unit for data and analysis to enhance digital capabilities. The unit is responsible for managing the machine learning platform and contributing to advanced analyses of both internal and external data. It plays a central role in driving digital transformation, handling large data volumes, and developing visualisation tools.

94. The continued development of digital expertise will remain a key priority in 2025. This unit will also be responsible for large-scale projects that require specialised digital expertise.

5. Summaries of or references to new reports and studies on competition policy issues

Margin study 2024 – Part 1⁴

95. In May 2024, the NCA published the first part of the margin study, mandated by the Ministry of Trade, Industry and Fisheries to enhance insight into profitability and competition dynamics in the grocery sector. The study examines the profitability of selected suppliers and the three largest grocery chains – NorgesGruppen, Rema 1000 and Coop – which operate at both the wholesale- and retail level – over the period 2017 to 2022.

96. The study is based on financial data from a range of suppliers across different product markets, as well as the three largest grocery chains. The NCA calculated gross margins, operating margins, and return on net operating assets to assess profitability trends in the grocery sector.

97. The study finds no clear evidence that grocery chains or suppliers exploited external crises such as the COVID-19 pandemic or the war in Ukraine to increase prices or boost profits. While groceries prices rose by 8.9 percent between December 2021 and December 2022, the study shows that operating margins and returns on capital declined in 2022, returning to pre-pandemic levels.

98. However, the study reveals consistently high profitability across the grocery value chain, exceeding what would typically be expected in a market characterised by intense competition and low barriers to entry. These results are consistent with previous assessments done by the NCA, which have pointed to limited competition in the Norwegian grocery market due to high market concentration and significant structural barriers.

Margin study 2024 – Part 2⁵

99. In January 2025, the NCA published the second part of the margin study, mandated by the Ministry of Trade, Industry and Fisheries as part of ongoing efforts to assess competition in the grocery sector. The study analyses margins on product-level of selected market participants in the grocery value chain over the period 2020 to the first half of 2023.

⁴ <https://konkurransetilsynet.no/wp-content/uploads/2024/05/Rapport-marginstudie.pdf>

⁵ <https://konkurransetilsynet.no/wp-content/uploads/2025/01/Del-2.-Kartlegging-av-marginer-ved-bruk-av-informasjon-pa-produktiva.pdf>

The same information was obtained for the grocery chains' private label products. The study is based on data from branded and private label suppliers, as well as from the same grocery chains as in Part 1 of the study. This study presents gross margins and contribution margins for suppliers and gross margins for grocery chains, offering a more granular perspective of pricing and profitability than Part 1 of the study.

100. The study finds substantial variation in profitability across product categories, with some segments, such as snacks and confectionery showing high margins, while others – particularly meat and seafood private label products showed low or even negative margins. The NCA also finds that on average the grocery chains achieved 12 percent lower margins on private label products compared to branded ones.

101. While the COVID-19 pandemic initially led to increased sales volumes and revenues, the report found that profit margins remained stable. After 2022, the input costs and prices increased, volumes declined, and supplier margins decreased, while retail margins remained largely unchanged. The results from this study support the conclusions of the previous part and provide additional evidence for assessing structural conditions and potential barriers to effective competition in the grocery sector.

Joint Nordic report 2024: Competition and labour markets⁶

102. In April 2024, the Nordic competition authorities published a joint report on competition in labour markets. The report examines how agreements between firms such as no-poach agreements and wage-fixing agreements may harm both workers and consumers and constitute infringements of competition law.

103. The report found that such agreements can reduce the labour mobility and bargaining power for employees, distort efficient resource allocation, and in turn reduce competition in the downstream markets. While collective bargaining agreements negotiated by trade unions are exempt from competition law in the Nordic countries, the report focuses on agreements that fall outside these exemptions.

104. The report draws on economic theory, legal frameworks and enforcement of competition law related to labour markets and includes a survey of Norwegian companies indicating that no-poach agreements are not uncommon in parts of the Norwegian labour market. It also outlines recent enforcement actions taken by Nordic and European authorities against anti-competitive conduct in labour markets and calls for increased awareness and enforcement in this area.

Studies on competition policy issues

105. Since 2014, the NCA has administered a research funding scheme in the fields of competition economics and competition law. These funds are allocated through the national budget proposed by the government, and adopted by the Parliament. The research grant is open for applicants from all institutional backgrounds. The aim of the grant program is to encourage and support research that contributes to the development of effective competition policy and enforcement in Norway, and to enhance the competitiveness of Norwegian firms in the global market. The NCA continues to disseminate findings through its website, academic journals and both internal and external seminars.

⁶ <https://konkurransetilsynet.no/wp-content/uploads/2024/04/Competition-and-Labour-markets-Joint-Nordic-report-2024.pdf>

106. This funding has contributed to strengthening Norwegian academic capacity in these disciplines and has generated valuable insights for the enforcement and policy work. Since 2022, research funding has been allocated through dedicated funds within the NCA's annual budget.

107. In 2024, the NCA supported ongoing research projects covering topics such as competition in the grocery market, cartel policy, the media market, and digital platforms. A total of NOK 2.4 million (USD 0.225 million) in grants was awarded to three new projects, including studies on sustainability and competition in digital platform markets. An overview of new, ongoing, and completed projects in 2024 is available on the NCA's website.⁷

⁷ <https://konkurransetilsynet.no/forskning/forskningsrapporter/>