



DH Prices: legislation and models

Crélida Mata



Euroheat & Power



Who we are:



International association for sustainable district heating and cooling



Voice and forum of the sector



Research & Innovation platform (DHC+) involved in 20 active European projects



160+ members from more than 30 countries
National DHC associations, utilities, manufacturers, equipment suppliers, start-ups, universities, research institutes and consultancies





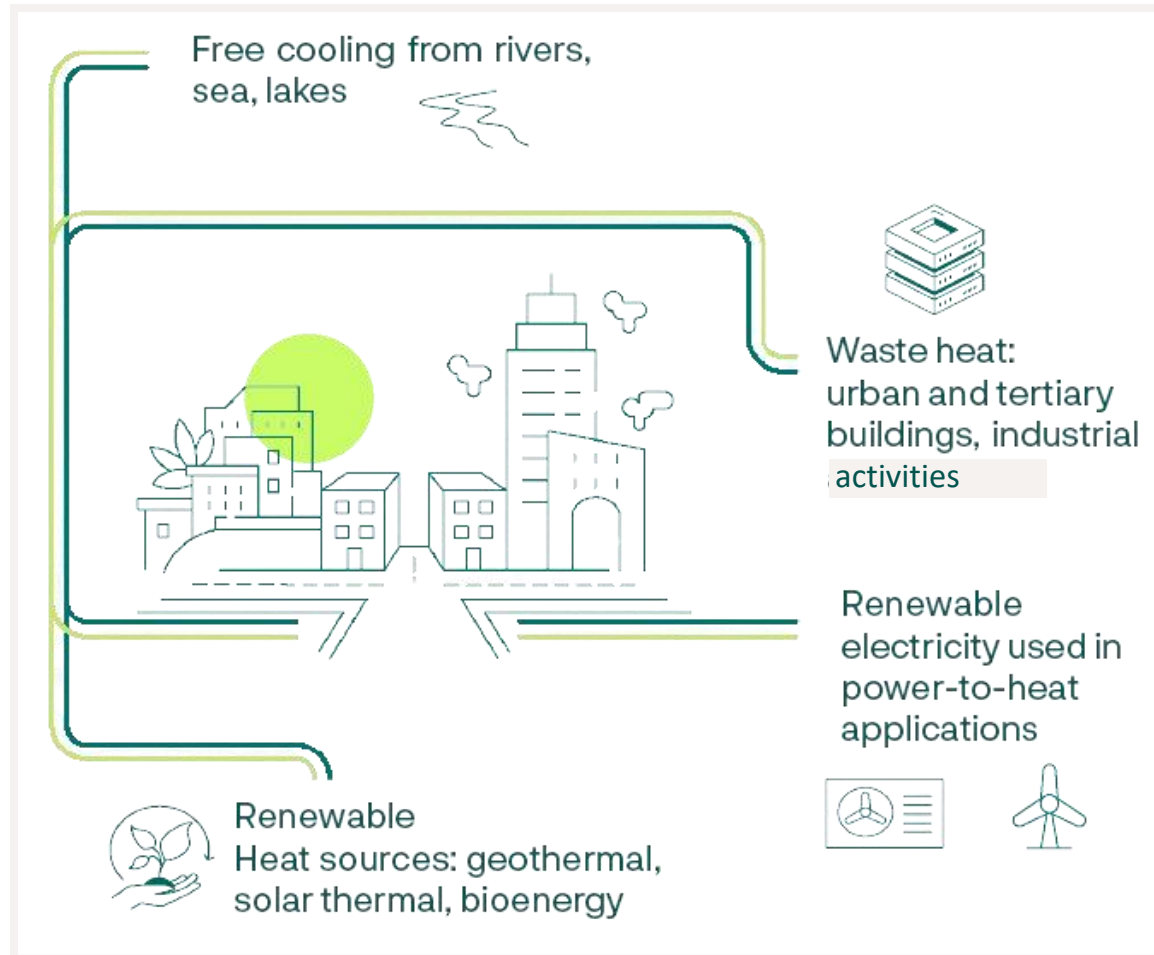
District heating and cooling: a unique energy infrastructure

13 % of the heat market

80 Million citizens connected in the EU

19,000 DHC Networks in the EU

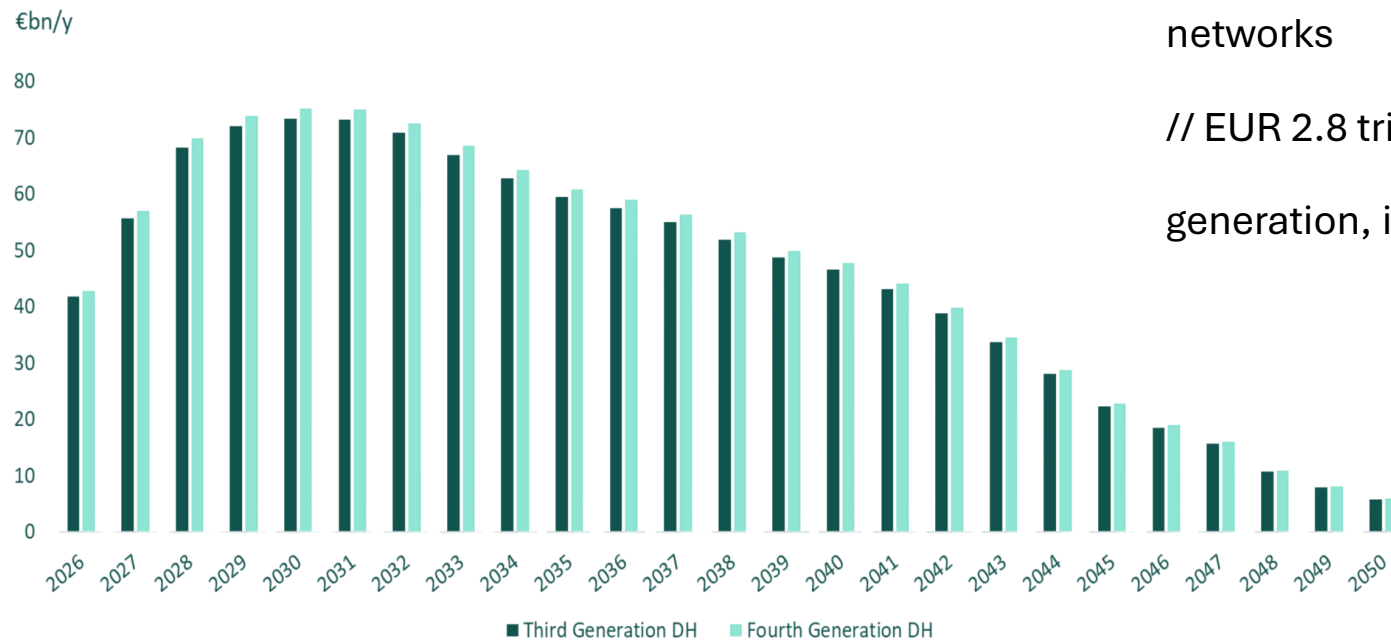
46.5 % of renewable & waste heat in the mix



Harnessing local recovered and renewables energy sources

Significant investments needed to scale-up efficient DHC solutions!

Investment in District heating by 2050



Source: Heat Roadmap Europe 5, Aalborg University, 2025.

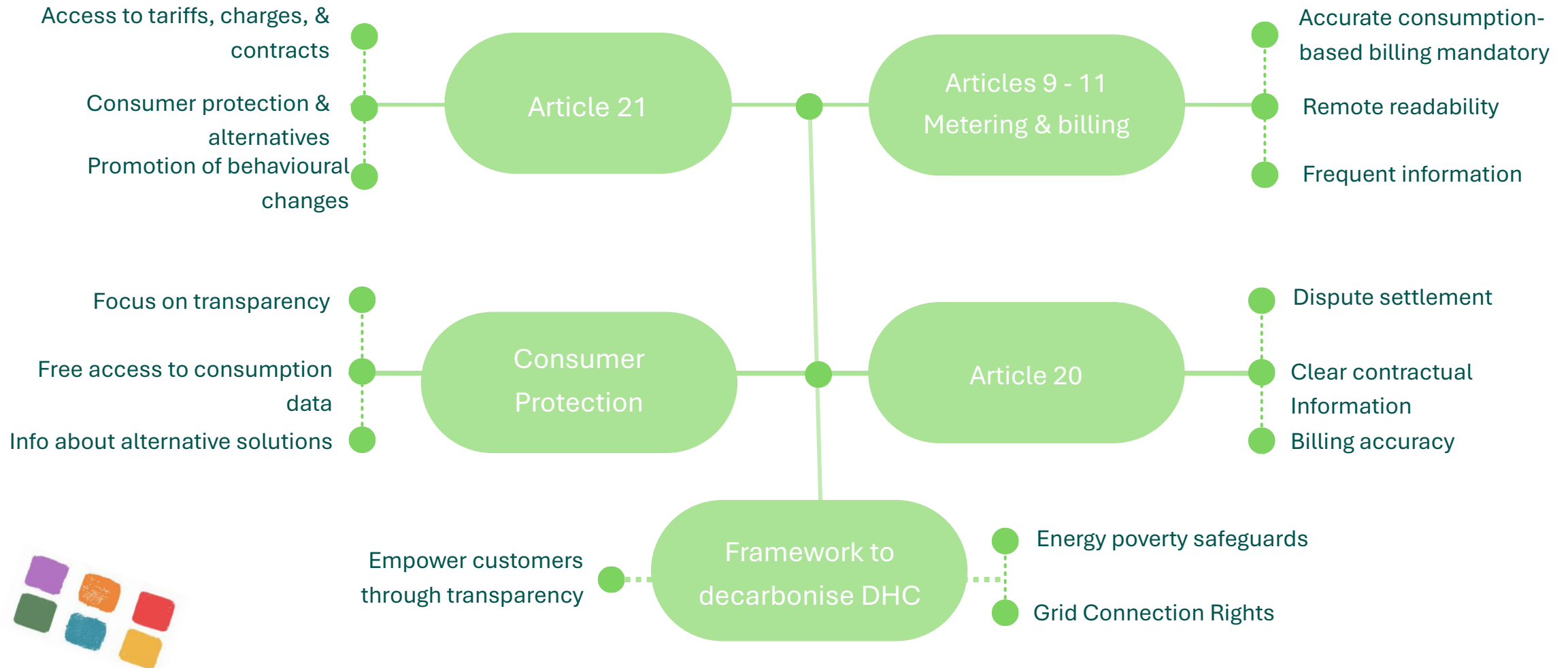
Costs by 2050: EUR 1.16 trillion for DHC infrastructure, including around €190 billion refurbishment costs for existing networks

// EUR 2.8 trillion needed for the whole heating sector: generation, infrastructure, grids

CAPEX intensive but
low OPEX



EED – transparency in DH pricing



Pricing modelling – key findings

- No harmonised approach to DH pricing: reflects different market structures & national regulatory philosophies
- Cost-based pricing most common across countries reviewed
- Need to balance affordability and long-term sustainability
- Regulation determines incentive structure
- Liberal systems rely on transparency & competition
- Price caps protect consumers but can limit flexibility



Free market vs
regulation

- DH price models vary considerably across Europe. Different regulatory approaches that take local context into account are needed!



DH pricing structures

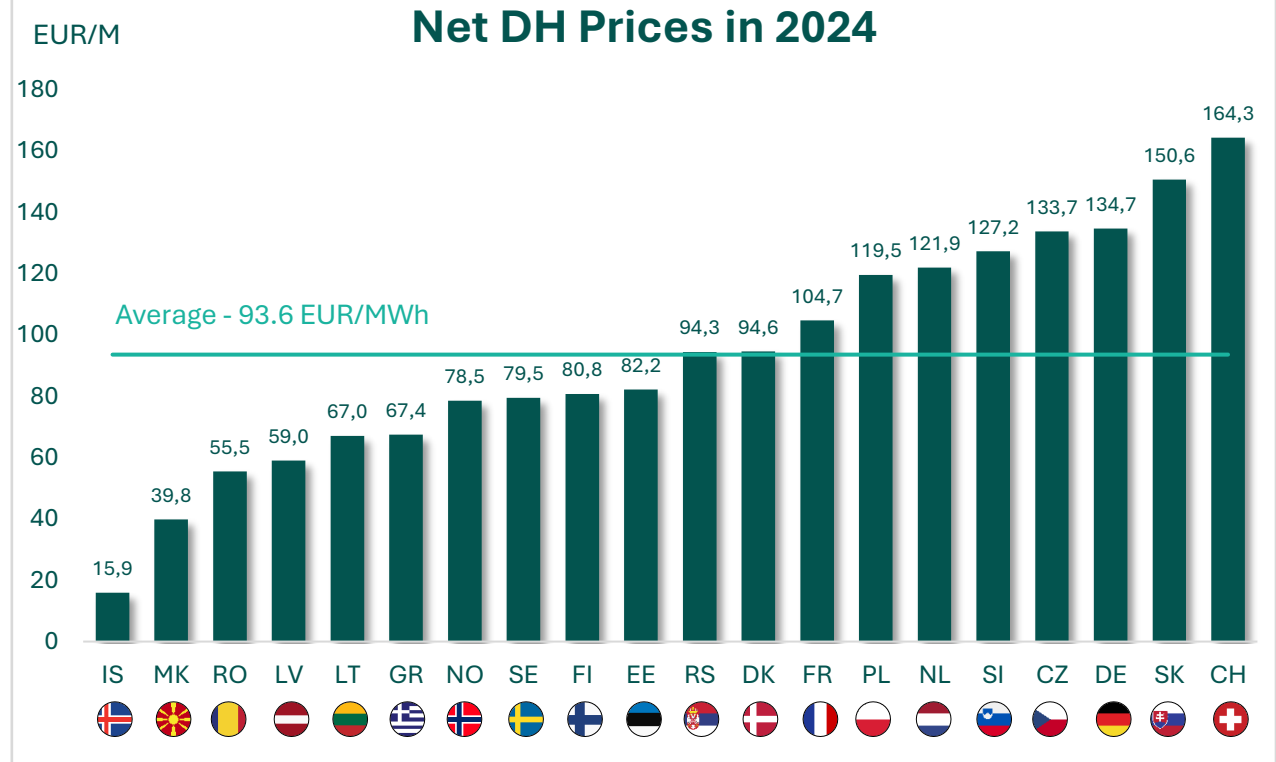
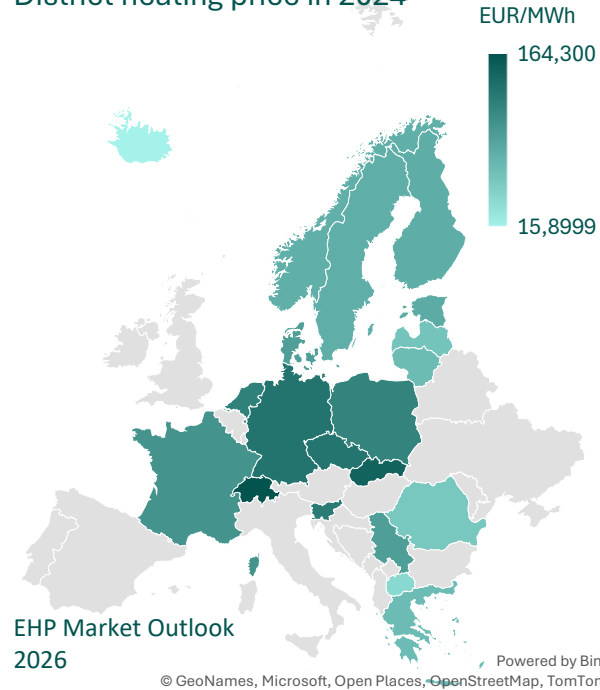
Country	DH price regulation	Pricing structure	Methodology	Consumer protection
 Czech Republic	Regulated	Single or 2-part	Cost + reasonable profits	No discrimination. Regulatory oversight.
 Denmark	Regulated	Fixed + variable	Non-profit, cost-based	Non-profit rules to safeguard consumers who are required to connect to DH if they live in DH zones). Price caps; regulated profits and costs.
 Finland	Liberal	2-part (Typically)	Free and open market	Right to disconnect & ban on unfair pricing. Focus on transparency.
 Poland	Regulated	Fixed + variable	Cost + (requires approval)	Transparency, metered billing, and regulated procedures for complaint resolution. Support for vulnerable households.
 Serbia	Regulated	2-part price: fixed + variable	Cost +	Public/municipal oversight; evolving framework.
 Slovakia	Regulated	2-part	Cost + justified profit (cap & efficiency)	Price caps. Regulated profits and costs.
 Sweden	Liberal	2-part price: fixed + variable	Negotiated, market-based	Dispute resolution mechanisms, 60-day notice; right to negotiate; dispute resolution.



DH prices across Europe

Country	Net DH Price (EUR/MWh)
 Iceland	15.9
 North Macedonia	39.8
 Romania	55.5
 Latvia	59.0
 Lithuania	67.0
 Greece	67.4
 Norway	78.5
 Sweden	79.5
 Finland	80.8
 Estonia	82.2
 Serbia	94.3
 Denmark	94.6
 France	104.7
 Poland	119.5
 The Netherlands	121.9
 Slovenia	127.2
 Czech Republic	133.7
 Germany	134.7
 Slovakia	150.6
 Switzerland	164.3

District heating price in 2024



Evolution of net DH prices

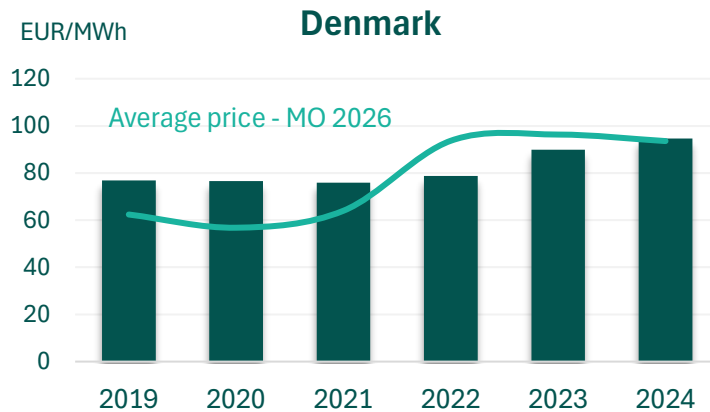
Liberalised market

+23.1% between 2021 - 2024



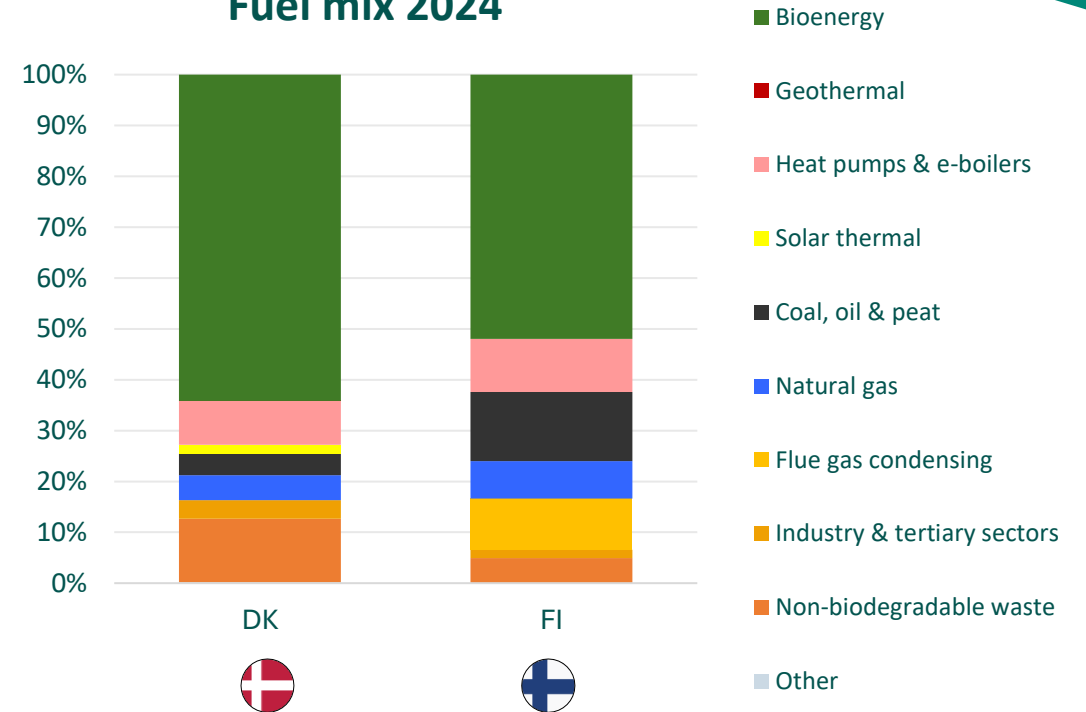
Regulated market

+24.7% between 2021 - 2024



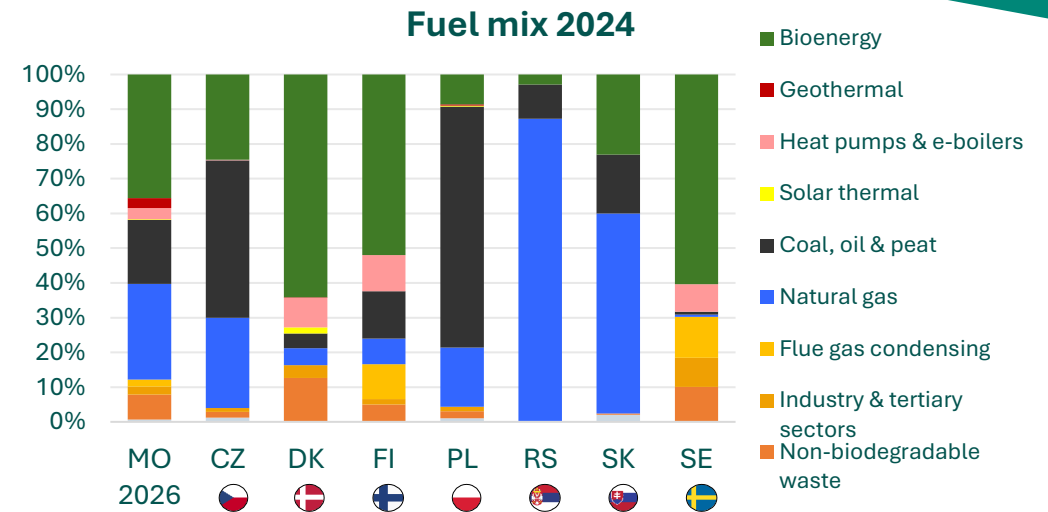
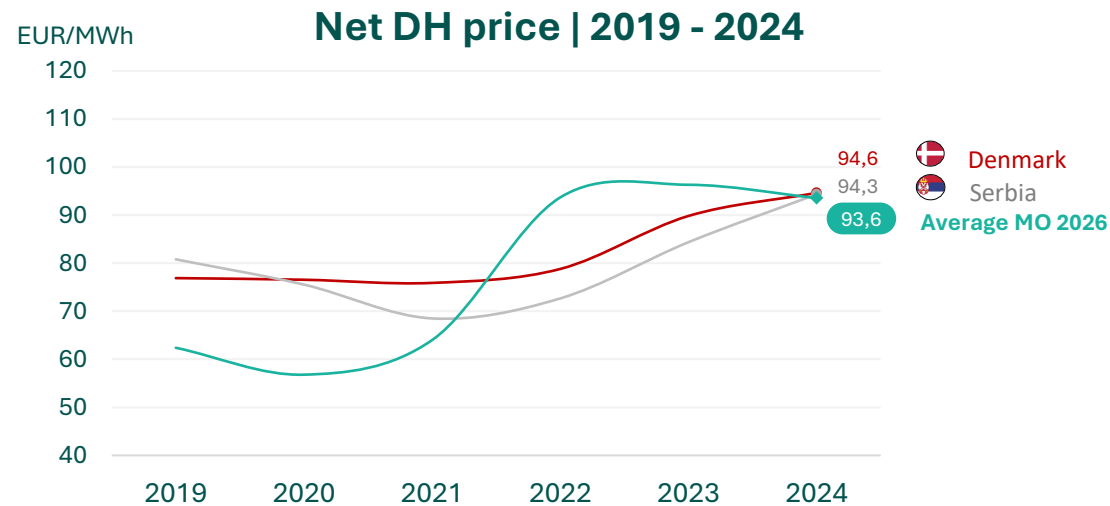
Market structure does not necessarily dictate price evolution!

Fuel mix 2024



DH prices & energy supply composition

Higher shares of fossil fuels do not always mean higher price volatility...but...



► Serbia – 97.1% natural gas share, price increase amounted to 37.7% between 2021 - 2024

► Denmark – 9.1% fossil, price increase amounted to 24.7% between 2021 - 2024



Source	MO 2026	CZ	DK	FI	PL	RS	SK	SE
Renewables	41.9%	24.7%	74.6%	62.4%	9.2%	2.9%	23.0%	68.3%
Fossils	45.9%	71.3%	9.1%	21.0%	86.4%	97.1%	74.5%	1.5%
Waste heat	11.5%	2.8%	16.2%	16.6%	3.3%	0%	0.4%	30.3%
Other	0.7%	1.2%	0.1%	0.05%	1.0%	0%	2.0%	0%

Key takeaways



Diverse Regulatory Approaches

There are various heat price regulation models ranging from market-based to strict oversight, reflecting diverse national contexts.

Consumer Protection and Transparency

There is a growing emphasis on safeguarding consumers and enhancing transparency in heat price regulation across Europe.

Safeguarding investment

Rising investment needs, volatile prices, and social concerns present challenges that require proactive regulatory engagement. Despite difference in approach, several countries try to balance the financial sustainability of suppliers with affordability for end users

Enabler for District Heating Growth

Effective heat price regulation is key to the expansion and transformation of DHC systems in Europe. EU regulation contributes by providing guidelines to reinforce consumer protection while allowing individual countries to set their pricing models.

Hvala na pažnji!
Thank you for your attention!

Crélida Mata
Euroheat & Power
cm@euroheat.org

