

# Energy Regulatory Office

<https://www.ure.gov.pl/en/energy-in-poland/25,Heat.html>  
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## Heat

The main feature of entities operating within the heating services sector is the local range of their activities. Particular sources and heating networks have local range, which means, that domestic heating market does not exist nationwide, as is the case with electricity and gas.

The specificity of heating supply is based on the fact, that heating is supplied to customers through heat transmission - hot water or steam. The vulnerability of the transmission on losing quality during the transport process determines its supply by pipes on short distances.

The heating service sector uses in its activity centralized and scattered systems of supplying in heat. That means, that the heating needs of the customers in the frame of heating and usable hot water are covered by heat produced both in centralized sources of heat and delivered through heating networks to many customers, as well as heat produced in local sources, individual for certain customers (scattered systems).

On the local heating market, the customer does not have the possibility to choose the company supplying heat transmission with specified parameters through the network, and the supplier has limited possibilities to win customers, which come from present existing technical conditions (range and parameters of existing networks) as well as economic (high capital-consumption of building new parts of the network and its development). Moreover, the parties, besides the agreement, are bound by fixed connection. The customer has, on the other hand, theoretically the possibility to choose the source, from which to purchase heat delivered through heating network. The choice will be always very limited by technical conditions, such as the configuration of heating network and transmission possibilities of its particular parts.

Due to this fact, competition on the local heating market can partly develop between heating enterprises by choosing technologies to produce heat, which in turn should be the factor leading to the decrease of costs and prices offered by the enterprises. Competition is also justified on the level of decision making, concerning the building and expansion of existing heating systems.

It is possible to observe big diversification of organizational solutions in Polish heating systems, and their strong dependence local conditions and historical facts. Particular elements of heating systems (heat sources, heating networks, heat distribution centers) may belong to different enterprises, municipalities or other owners as well as be utilized by different enterprises.

Responsibility for energy security on local heating markets burdens generally energy enterprises. The state of local energy security in the scope of providing heat, that is, the ability to meet the heating needs of customers on the local heating market depends not only on the economic-financial situation of energy enterprises, but also on the financial condition of the customers, with which the regularity of payments for providing heat is strictly connected. Payment arrears of customers against enterprises may threaten to support the heat delivery continuity.

Heating enterprises in most cases are integrated vertically and own licenses for different types of heating activities. Around 65% of them connect production with transmission and distribution of heat, and over 25% besides production and distribution deal with turnover.

Technical capabilities of heating enterprises are characterized by big disintegration and diversification. Heating enterprises have different size of sources to produce heat, however, the quantity predominance have smaller source. In 2008 the installed power of licensed heating enterprises amounted to 62 752,3 MW, and available - 60 530,5 MW. Over 1/3 of the heating production potential is concentrated in two voivodeships, namely in śląski and mazowiecki. The lowest share in domestic potential of installed and available power was available in the following voivodeships: lubuskie, świętokrzyskie, podlaskie and warmińsko-mazurskie (by around 2%).

Around 90% of licensed heating enterprises are concentrated on producing heat. In 2007 they produced (including recovery) almost 435 thousand of TJ of heat. Part of these enterprises (17,7%) produced heat in co-generation with the production of electricity. Presently over 62% of produced heat (251 TJ) was produced in co-generation, in power stations and in heat and power plants belonging to professional electro-energy, professional heating as well as to industry at the same time. The structure of fuels used to produce heat has been slightly changing in the past few years. The basic fuel used to produce heat is still hard coal, but its share is constantly decreasing. On the other hand, the share of heat produced by using biomass is slowly growing.

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