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European Union Sanctions on Russian Natural Gas Supplies in the Context of the Security of Central European Countries

The entry into force of successive EU restrictions on imports of Russian natural gas is intended to complete the process of phasing out supplies from Russia and to permanently reshape the structure of the European market for this commodity. The REPowerEU regulation, adopted in early 2026, provides for a gradual phase-out of imports: from a ban on concluding new contracts, through restrictions on short-term agreements, to the complete elimination of Russian LNG and pipeline natural gas supplies by the end of 2027. Although the share of Russian natural gas in EU imports fell from approximately 45% before Russia's full-scale aggression against Ukraine to around 12% in 2025, this still represents significant volumes that will need to be replaced. For Central Europe, the key challenge will, therefore, be to secure alternative sources of supply, transmission routes, storage capacity, and contractual flexibility.

European countries still importing natural gas from Russia. Following the expiry of transit through Ukraine in early 2025, Russian natural gas currently reaches Europe primarily through the TurkStream pipeline and its European branch, which enters the EU via Bulgaria. Hungary and Slovakia remain the main recipients, alongside Serbia outside the EU. Natural gas from this pipeline may also be directed to Romania and Greece as well as to Balkan countries, including North Macedonia and Bosnia and Herzegovina. Hungary represents a particular case: in 2021, the state-owned company MVM CEEnergy concluded a 15-year contract with Gazprom for the supply of 4.5 bcm of natural gas per year, valid until 2036, with most of the volume delivered via Serbia and TurkStream. Subsequent agreements signed after 2022 further increased Budapest's dependence on Russian natural gas. Slovakia's SPP has declared that it is preparing for long-term operation without Russian natural gas, while at the same time maintaining a long-term contract with Gazprom that remains in force until 2034. Serbia, although not an EU member state, remains particularly dependent on Russian supplies; its contract has been extended several times on a short-term basis, while deliveries via Bulgaria amount to approximately 2.2 bcm per year. A second form of Russia's continued presence on the market is LNG. According to available data, Russian LNG was delivered primarily to terminals in countries with substantial regasification capacity, including France, Spain, Belgium, and the Netherlands. Some of these volumes may subsequently have been redirected within the EU market. The Yamal LNG project remained the most important source of Russian LNG for the EU, while additional sanctioned supplies may have originated from the Arctic LNG 2 and Portovaya LNG projects. EU regulations, however, are also closing this route, as short-term LNG contracts have been subject to earlier phase-out deadlines, while long-term contracts are to be prohibited from 1 January 2027.

The significance of the ban for the security of natural gas supplies to Europe. On 17 June 2026, a ban entered into force covering supplies of Russian natural gas delivered by pipeline under short-term contracts (shorter than one year). The ban has a dual effect on energy security; firstly, it strengthens the resilience of the EU by limiting Russia's ability to use natural gas as an instrument of political pressure and by systematising the process of phasing out supplies that, after 2022, became a source of systemic risk. The requirement for prior import authorisation, verification of the origin of natural gas, and the preparation of national diversification plans strengthens control over flows and reduces the risk of circumvention. For Central European states, this also means the end of regulatory uncertainty, as companies and governments receive a clear time horizon within which they must adjust contracts, infrastructure, and procurement portfolios.



Secondly, however, the ban may temporarily increase the region's exposure to price volatility and capacity constraints. The most vulnerable to this are the landlocked countries that have historically relied on long-term contracts, storage facilities, and eastern routes. Hungary and Slovakia feared that a rapid phase-out of Russian natural gas would raise costs and complicate system balancing during winter. The issue is not merely the replacement of volumes, but also the provision of flexibility: alternative LNG requires access to terminals, regasification capacity, interconnectors, and competitive transmission bookings. If south-east infrastructure and west-east connections are not developed faster than Russian supplies are reduced, price pressure may become concentrated precisely in Central Europe.

At the same time, data on the structure of imports indicate that the EU already has tangible options for replacing Russian supplies. In 2025, Norway was the largest supplier of natural gas to the EU, while the role of the United States has increased sharply as a result of the expansion of LNG exports. Supplies from Algeria and Azerbaijan, as well as LNG imports from other directions, are also significant. This means that the fundamental challenge is not the global availability of natural gas – further disrupted as a result of the war in the Middle East – but rather the regional distribution of the commodity and the cost of transporting it to landlocked states. For Central Europe, therefore, connections with terminals in Poland, Croatia, Greece, Germany, Italy, the Netherlands, and Belgium are crucial, as is the ability to transmit natural gas from the west and south towards the eastern part of the continent.

EU actions and the impact of the conflict in the Middle East. In order to reduce the risk of shortages, the EU should combine its sanctions policy with an active supply and demand policy. Initially, the development of infrastructure enabling natural gas supplies from non-Russian directions should be accelerated: LNG terminals, interconnectors, reverse-flow capacities, and transmission corridors. The Vertical Gas Corridor ([“IEŚ Commentaries”, No. 1620](#)) linking Greece, Bulgaria, Romania and, further north, Central Europe, is of particular importance as it enables the transmission of LNG from Greek terminals and, potentially, natural gas from Azerbaijan and other southern sources. Importantly, the Bulgarian company Bulgartransgaz has recently increased capacity at the Kulata/Sidirokastro, Negru Voda 1/Kardam and Kyustendil/Zhidilovo points, and reduced transmission costs, which will improve the conditions for transporting LNG from reliable sources, including the United States. This should be complemented by joint purchasing and demand aggregation, long-term partnerships with suppliers from Norway, the United States, Algeria, Qatar, and Azerbaijan, and the removal of regulatory barriers that hinder cross-border flows.

Furthermore, the EU should maintain storage mechanisms, but in a more flexible form than uniform filling obligations. Mandatory targets may distort price signals, especially when summer prices exceed winter prices. A better solution may be to combine minimum security requirements with national reserves, joint purchasing in crisis situations, and incentives for earlier contracting. Ukraine, which has the largest storage capacity in Europe, could serve as an additional buffer, provided that security conditions allow it, including the effective protection of infrastructure against Russian attacks.

Third, it is necessary to reduce demand for natural gas. This requires improvements in energy efficiency, the electrification of district heating, and the development of low-emission energy sources such as renewables, biomethane, and heat pumps. The lower the consumption of natural gas, the lower the vulnerability to global competition for LNG supplies. The conflict in the Middle East has highlighted this dependency: according to the International Energy Agency (IEA), the de facto closure of the Strait of Hormuz in 2026 temporarily reduced around 20% of global LNG supply, increasing price volatility in Europe and Asia and complicating the filling of European storage facilities. It is particularly important that a substantial share of Qatar's LNG exports, one of the key suppliers to the global market, passes through the Strait of Hormuz. In practice, by moving away from Russian pipelines, Europe has partly shifted the risk from relations with a single supplier to an LNG market vulnerable to maritime bottlenecks, competition with Asia, and the geopolitical situation in the Middle East.

Conclusions

- EU sanctions strengthen Central Europe's strategic security, but they do not automatically eliminate supply risks. Reducing imports of Russian natural gas lowers vulnerability to Russian political pressure



and brings greater order to the diversification process; however, it requires the effective replacement of contracts, transmission capacity, and systemic flexibility. The situation will be most difficult for landlocked states, which lack direct access to the sea and must compete for transmission capacity from LNG terminals located in other countries.

- The development of regional infrastructure is a key condition for the effectiveness of the ban. The Vertical Gas Corridor, interconnectors, reverse-flow capacities, storage facilities, and strategic reserves should be treated as components of a common security architecture, rather than solely as national projects. Without them, the ban on exports of Russian natural gas may lead to local price tensions and an uneven distribution of the costs of moving away from Russian supplies.
- Import diversification will not be sufficient if Europe remains heavily dependent on LNG. The conflict in the Middle East has shown that the global LNG market is also vulnerable to disruption, particularly in the area of the Strait of Hormuz and amid competition with Asia. The most durable way to strengthen the security of Central European states is, therefore, to simultaneously reduce natural gas consumption, develop low-emission energy sources, improve efficiency, maintain flexible reserves, and build mechanisms capable of mitigating short-term price and supply shocks.