

Breaking Free from Russian Natural Gas Without Creating New Dependencies: Four Recommendations for the EU

KEY POINTS

1. The EU has reduced Russia's share of natural gas imports from about 45% to around 13-15%. The EU plans to stop Russian gas imports completely by 2027.

2. However, the process is not easy. In 2026, EU imports of Russian LNG reached record levels. At the same time, the EU is buying more LNG from the U.S. and the global market.

3. Gas storage is around 68% and gas prices are still high. The EU needs better control, more suppliers, and more support for the member states that may face problems.

implement stricter oversight, pursue genuine diversification, and support the member states most at risk.

Since Russia's full-scale invasion of Ukraine in 2022, the European Union has been trying to reduce its dependence on Russian fossil fuels. In January 2026, EU member states adopted a regulation to stop Russian pipeline gas and LNG imports. Russian LNG imports will be completely banned at the beginning of 2027, while the pipeline gas ban will start in the fall of 2027 (Council of the EU, 2026b). However, the process is not finished yet. Russian LNG imports reached record levels in the first half of 2026. One reason was that some buyers purchased more gas before the 2027 ban. The closure of the Strait of Hormuz also made the global LNG market tighter and increased gas prices.

At the same time, the EU is buying more LNG from the United States. This helps replace Russian gas, but it can also create another type of dependence.

For this reason, the EU should follow the phase-out deadlines, close loopholes that allow Russian gas imports to increase, use different suppliers, and help the member states that are more exposed to this change.

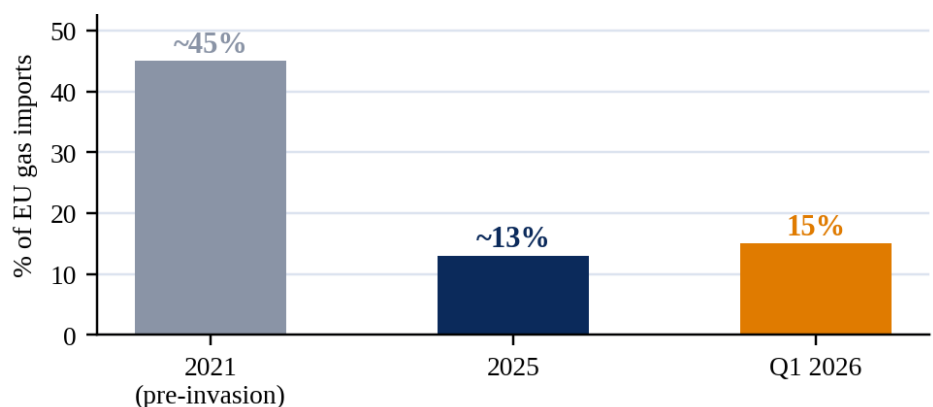


Figure 1. Russia's share of EU gas imports. Note. Data from GIS Reports (2026) and IEEFA (n.d.); measures differ slightly by source.

Background: From Dependence to a Legal Phase-Out

Before 2022, Russia provided about 45% of the EU's pipeline gas and LNG imports (GIS Reports, 2026). After the Russian invasion of Ukraine, EU countries decided to reduce this dependence.

In March 2022, EU leaders agreed to reduce their dependence on Russian energy. Later, the European Commission presented the REPowerEU plan. Its main goal was to end Russian energy imports by the end of 2027. The EU also introduced new sanctions. In October 2025, the 19th sanctions package included a ban on Russian LNG under long-term contracts, planned to start on January 1, 2027 (European Commission, n.d.).

The first important legal step was Regulation (EU) 2026/261. It was adopted on January 26, 2026, and entered into force on February 3, 2026 (Council of the EU, 2026b, n.d.). Companies have to inform authorities about their Russian gas contracts, and member states had to prepare plans to find other gas suppliers.

The ban is being introduced step by step. Short-term LNG contracts have been banned since April 25, 2026. Short-term pipeline gas contracts ended on June 17, 2026. Some long-term pipeline gas contracts can continue until September 30, 2027 (OilPrice.com, 2026).

The EU's Current Situation

The amount of gas imported from Russia has decreased a lot, but it has not completely stopped. Russian gas still represents about 12% of EU gas demand (ACER, 2026). In the first quarter of 2026, Russia was still the EU's third-largest gas supplier, after Norway and the United States, and represented about 15% of the EU's gas import mix (IEEFA, n.d.).

Russian oil is different. It represented less than 3% of EU oil imports in 2025 (GIS Reports, 2026). However, EU countries still paid about \$5.9 billion for Russian pipeline gas and \$6.7 billion for Russian LNG in 2025 (IEEFA, 2026).

The remaining Russian pipeline gas mainly comes through TurkStream via Türkiye and serves Hungary and Slovakia. Both countries opposed the regulation. Hungary said that the regulation could affect member states' right to decide their own energy mix (Council of the EU, 2026a).

The Problem: Three Weaknesses in the Phase-Out

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1. Russian LNG Imports Are Increasing

Russian LNG imports to the EU increased by 16% in the first quarter of 2026 compared with the same period in the previous year. This was the highest quarterly level since the Russian invasion (IEEFA, 2026).

In the first half of 2026, Russian LNG imports reached record levels and represented almost 20% of total EU LNG imports. Belgium, France, and Spain made up around 90% of these imports (Molnar, 2026). One reason was the crisis in the Middle East. When LNG supplies from Qatar decreased, some buyers turned to Russian LNG and bought more gas before the 2027 ban (OilPrice.com, 2026).

Long-term contracts are another issue. They can continue to send money to the Yamal LNG project until they expire (Brussels Signal, 2026).

2. A New Dependence Is Emerging

As Russian gas imports have decreased, the United States has become an important supplier. In 2025, it provided 57% of EU LNG imports (GIS Reports, 2026) and may become the EU's largest gas supplier in 2026 (IEEFA, n.d., 2026).

In the first half of 2026, the EU received 30.4 million tonnes of LNG from the United States, more than three times Russia's 9.9 million tonnes (Natural Gas Intelligence, 2026). Depending too much on one supplier can create risks when prices increase or supplies are interrupted. The Strait of Hormuz crisis showed this risk.

3. Low Storage Levels and High Prices Leave Little Margin for Error

EU gas storage was around 68% in mid-September 2026, below the five-year seasonal average of about 84% (Discovery Alert, 2026; Global Energy Flow, 2026). The target for November 1 was lowered to 80% (Global Energy Flow, 2026). The Dutch TTF gas price reached around ?84/MWh in early September, the highest level in about four years, and was around ?74/MWh on September 28 (Discovery Alert, 2026; Trading Economics, 2026). Low storage and high prices mean that the EU has less room for problems. A cold winter or another supply crisis could make the situation more difficult.

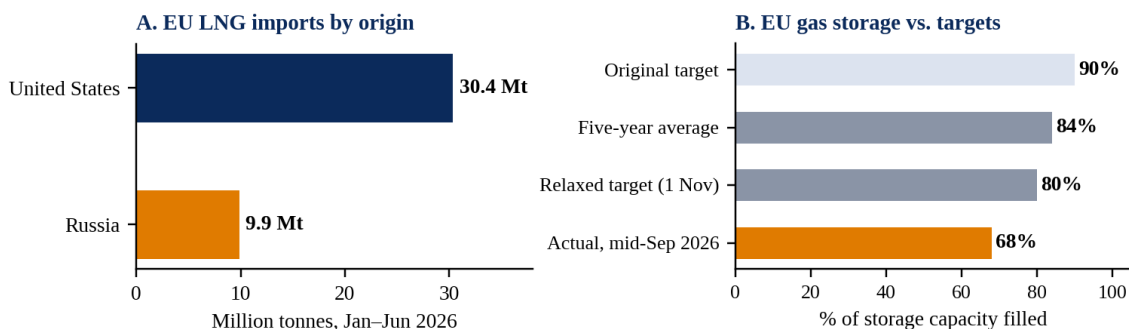


Figure 3. LNG import sources and gas storage in the EU. Note. Panel A: Natural Gas Intelligence (2026); Panel B: Discovery Alert (2026) and Global Energy Flow (2026).

What Needs to Change

1. Keep the Deadlines and Close the Loopholes.

The EU should keep the deadlines for ending Russian gas imports. It should also stop companies from buying very large amounts of Russian gas before the ban. The European Commission should publish information about Russian LNG and pipeline gas imports every three months. It should also work with Belgium, France, and Spain to find ways to end long-term Yamal LNG contracts earlier if possible (Council of the EU, 2026b; Molnar, 2026).

2. Plan Gas Diversification.

Replacing Russian gas mainly with American LNG can create a new dependence. The EU should not depend too much on one country. It should use joint purchasing, clear diversification targets, and increase gas supplies from Norway, Algeria, and the Eastern Mediterranean. It should also continue using different LNG suppliers (Council of the EU, n.d.; IEEFA, n.d., 2026).

3. Prepare Better Storage Rules.

EU gas storage levels are below the seasonal average, so the EU needs a clear winter plan. It should decide who is responsible for filling storage facilities and when. It should also use joint gas purchases and prepare demand-reduction plans that can start when storage levels fall below certain levels (Discovery Alert, 2026; Global Energy Flow, 2026).

4. Support the Most Exposed Member States.

Hungary and Slovakia are more dependent on Russian gas than some other EU countries. They need investment in new gas routes and connections with other European countries, as well as access to non-Russian gas supplies. EU financial support should be connected to clear goals (Council of the EU, 2026a, 2026b; GIS Reports, 2026). In the long term, reducing gas consumption is also important. Analysts estimate that Europe's LNG demand could decrease by about 23% between 2025 and 2030 (IEEFA, 2026).

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