

# ETS2 AND CZECHIA'S ENERGY SELF-SUFFICIENCY: CAN CARBON PRICING SUPPORT THE PHASE-OUT OF IMPORTED GAS AND OIL?

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Editor: Rebeka Hengalová

March 2026

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**Co-funded by  
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## Introduction

*In an era of escalating climate change, geopolitical tensions and deepening dependence on imported fossil fuels, the Czech Republic stands at a turning point in its energy transition. With fossil fuel imports historically securing major portions of the country's gas and oil supply chains, concerns over energy security have emerged alongside environmental imperatives.<sup>1</sup> Therefore, the implementation of Emissions Trading System 2 (ETS2) offers a dual-faced opportunity: on one hand, it can serve as another impulse for reducing reliance on foreign oil and gas, enhancing national resilience and autonomy; on the other, it risks becoming a flashpoint of political division and social backlash, especially among households and small enterprises in rural areas sensitive to rising costs.*

Reflecting the climate commitments under the Paris Agreement<sup>2</sup>, the European Green Deal<sup>3</sup> and its Fit for 55 files<sup>4</sup>, the EU established carbon pricing mechanisms<sup>5</sup> to support the climate neutrality by 2050 goal.<sup>6</sup> The longest-running mechanism, the Emissions Trading System (ETS, also referred to as ETS1), established in 2005, is the cornerstone of the EU's climate policy, charging the greenhouse gas (GHG) emissions from large emitters, such as major power plants, heating plants, heavy industry, and the aviation and maritime sectors<sup>7</sup> It operates on a “cap-and-trade” principle, setting a gradually declining limit on total emissions and currently covering approximately 38 % of GHG EU emissions<sup>8</sup>. Building on this framework, the ETS2<sup>9</sup> newly focuses on road transport, local heating of buildings, and emissions from small energy and industrial enterprises, aiming to cover an additional 47 %<sup>10,11</sup>. In contrast to ETS1, where obligations are placed directly on emitters, ETS2 regulates fuel suppliers who must purchase

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<sup>1</sup> Please note that this text was written before oil crisis of March 2026+. International Energy Agency. *Czech Republic 2021: Energy Policy Review*. Paris: IEA, 2021.

<sup>2</sup> United Nations. *Paris Agreement*, adopted 12 December 2015, entered into force 4 November 2016, United Nations Framework Convention on Climate Change (UNFCCC).

<sup>3</sup> European Commission, Directorate-General for Communication. *The European Green Deal: Delivering the EU's 2030 Climate Targets*. Luxembourg: Publications Office of the European Union, 2023.

<sup>4</sup> Council of the European Union. *Fit for 55: The EU Plan for a Green Transition*. Brussels: Council of the EU, 2025.

<sup>5</sup> Apart from the ETS, there is the Carbon Border Adjustment Mechanism (CBAM), a EU policy instrument that places a carbon price on certain imported goods to prevent carbon leakage and ensure that foreign producers face costs comparable to those imposed under the EU ETS.; European Parliament and Council of the European Union. *Regulation (EU) 2023/956 Establishing a Carbon Border Adjustment Mechanism*. Official Journal of the European Union L 130 (May 16, 2023).

<sup>6</sup> European Commission, Fit for 55: Delivering the EU's 2030 Climate Target on the Way to Climate Neutrality, COM(2021) 550 final (Brussels: European Commission, 2023).

<sup>7</sup> European Environment Agency (EEA), *Trends and Projections in Europe 2023: Tracking Progress towards Europe's Climate and Energy Targets* (Copenhagen: EEA, 2023).

<sup>8</sup> European Commission, *EU ETS Handbook* (Brussels: Directorate-General for Climate Action [DG CLIMA], 2024).

<sup>9</sup> The ETS2 was set to be introduced in 2027, but is currently postponed to 2028.

<sup>10</sup> The remaining 15 % belongs to agriculture and waste management.

<sup>11</sup> Jakob Graichen and Sylvie Ludig, *Interim Report: Supply and Demand in the ETS 2. Assessment of the New EU ETS for Road Transport, Buildings and Other Sectors* (Dessau-Roßlau: German Environment Agency / Öko-Institut e.V., 2024); European Commission, Directive (EU) 2023/959 of the European Parliament and of the Council Amending Directive 2003/87/EC, Official Journal of the European Union L 130/134 (2023).

and surrender emission allowances corresponding to the carbon content of the fuels they sell. This upstream design should simplify administration and ensure that carbon costs are internalised throughout the value chain, eventually reflected in consumer prices<sup>12</sup> to adopt lower<sup>13</sup>. Therefore, the projected price increases after ETS2 implementation for oil fuels are estimated at 12-14 % and for coal up to 56 %<sup>14</sup>. However, the existing projections vary greatly, as illustrated by the Czech National Bank study, which states that in the moderate price increase scenario, oil fuel prices could increase by 9-10 % and coal prices by.<sup>15</sup> Hence, this question still faces a lot of uncertainties.

## Czechia's Energy Mix: Where do imported fossil fuels come from?

Since there is a projected change in the energy and transportation sector in the following years, it is of a great importance to map the current situation in the Czech setting regarding its energy mix as well as imports and exports of fossil fuels the consumption of which might decrease with the new ETS2 system. Currently, Czechia remains highly dependent on fossil fuel imports: natural gas imports cover the overwhelming share of domestic consumption (95 %) and all crude oil needs are met by imports only, transported by the Druzhba (42 %) and IKL (58 %) oil pipelines mainly from Russia (2715 kt), Azerbaijan (2610 kt) and Kazakhstan (1015 kt) according to the Ministry of Industry and Trade 2024 report.<sup>16</sup> Consequently, the imported crude oil is then processed in two major Czech refineries located in Litvínov and Kralupy nad Vltavou.<sup>17</sup> In fact, the transport sector is by far the dominant use of oil products in Czechia. International Energy Agency (IEA) country data indicates that around 70-80 %<sup>18</sup> of Czech final consumption of oil products goes to transport, while road transport represents the main share.<sup>19</sup> This means that the bulk of imported crude oil and refined products ends up as petrol or diesel for vehicles, aviation fuel etc. rather than household heating. Indeed, oil is a minor component of household heating in Czechia since it accounts for a small percentage compared to gas, district heating and solid fuels. On the contrary, imported gas represents a meaningful share of household and district heating source, accounting for around 40 % of

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<sup>12</sup> However, an immediate phase-out of fossil fuels is not always possible for households and small businesses, thus, targeted financial and administrative support is necessary.

<sup>13</sup> European Commission, ETS2 Implementation Guidance: Fuel Supplier Obligations and Upstream Coverage (Brussels: DG CLIMA, April 2024).

<sup>14</sup> Öko-Institut, ETS II and Fuel Price Impacts in the European Union: Modelling Results (Berlin: Öko-Institut Policy Paper, September 2024); Bruegel, Making the Best of the Social Climate Fund (Brussels: Bruegel Policy Brief, 2023).

<sup>15</sup> Czech National Bank (Česká národní banka). *Monetary Policy Report: Summer 2025*. Prague: ČNB, 2025.

<sup>16</sup> Ministerstvo průmyslu a obchodu (MPO), Zpráva o činnosti a hospodaření Energetického regulačního úřadu a Národní zpráva o elektrizační a plynárenské soustavě České republiky za rok 2023 (Praha: MPO, 2024).

<sup>17</sup> ČEZ Group, Annual Report 2023 (Prague: ČEZ, 2024).

<sup>18</sup> The remaining 20–30 % is mainly split between industries, services, residential use and losses.

<sup>19</sup> International Energy Agency (IEA), Czech Republic 2023 Energy Profile (Paris: IEA, 2023).

total national gas utilization which can be further broken down to approximately 26 % of direct household gas use and 14 % of gas used in district heating plants for heat production.<sup>20</sup>

## Diversification of imports as a means to self-sufficiency?

Since the beginning of the Russian aggression in Ukraine, energy self-sufficiency is no longer seen purely as an environmental or economic goal, but as a geopolitical necessity. There are visible efforts to diversify gas sources, deviating from Russian pipeline supply and shifting the focus to either Western or Nordic sources.<sup>21</sup> Despite net zero direct Russian pipeline imports in most of the 2024, there have been temporary increases in natural gas flows from Russia, resulting in spikes month-to-month. According to the Czech Statistical Office<sup>22</sup>, such peaks in supplies can reach up to 60 % of the total volume of gas import to Czechia which happened during January 2024 mostly due to re-imports via Slovakia. In other months, when LNG or Norwegian gas dominated Central European flows, the share of Russian-origin gas dropped to single digits. The importance of fossil fuel product imports, and their origin can be further supported by the fact that local natural gas production, managed by Moravian Oil Mines (Moravské naftové doly, MND), is negligible and accounts only for approximately 1-2 % of the domestic demand, and 3 % for crude oil production respectively.<sup>23</sup>

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<sup>20</sup> Czech Statistical Office (ČSÚ), Statistika energetické bilance 2024 (Prague: ČSÚ, 2024).

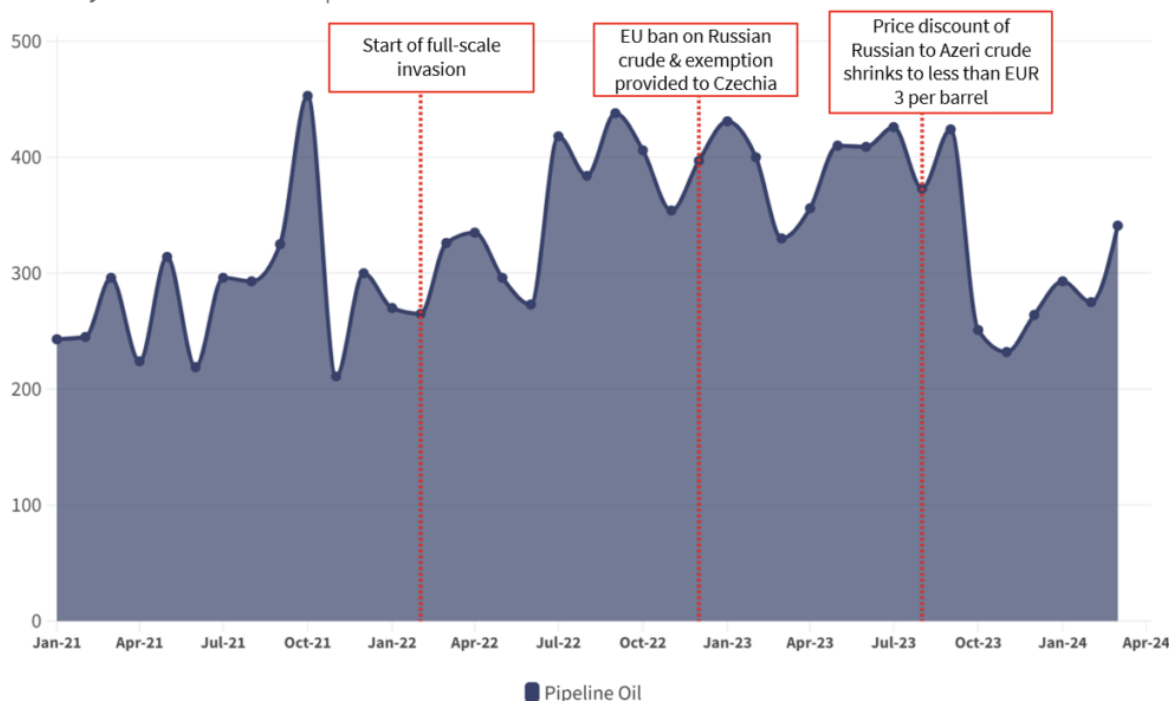
<sup>21</sup> International Energy Agency. "Global Energy Review 2022: Europe Gas Supply Shifts After Ukraine War." IEA, 2022.

<sup>22</sup> Czech Statistical Office (ČSÚ), Měsíční zpráva o dovozech a vývozech zemního plynu, leden 2024 (Prague: ČSÚ, 2024).

<sup>23</sup> ENTSOG, Transparency Platform – Monthly Gas Flows in Central Europe (Brussels: ENTSOG, 2024).

## The Czech Republic's monthly import volume of Russian crude oil via pipeline

January 2021 to March 2024 | Thousand tonnes



Source: CREA analysis • Note: Czechia experienced a significant drop in imports observed in April and June 2024 due to an unexplained disruption to oil supply via the Druzhba pipeline. Therefore, the data shown is until the end of March 2024.



**Fig. 1:** Crude oil imports from Russia to Czechia, January 2021 to March 2024.<sup>24</sup>

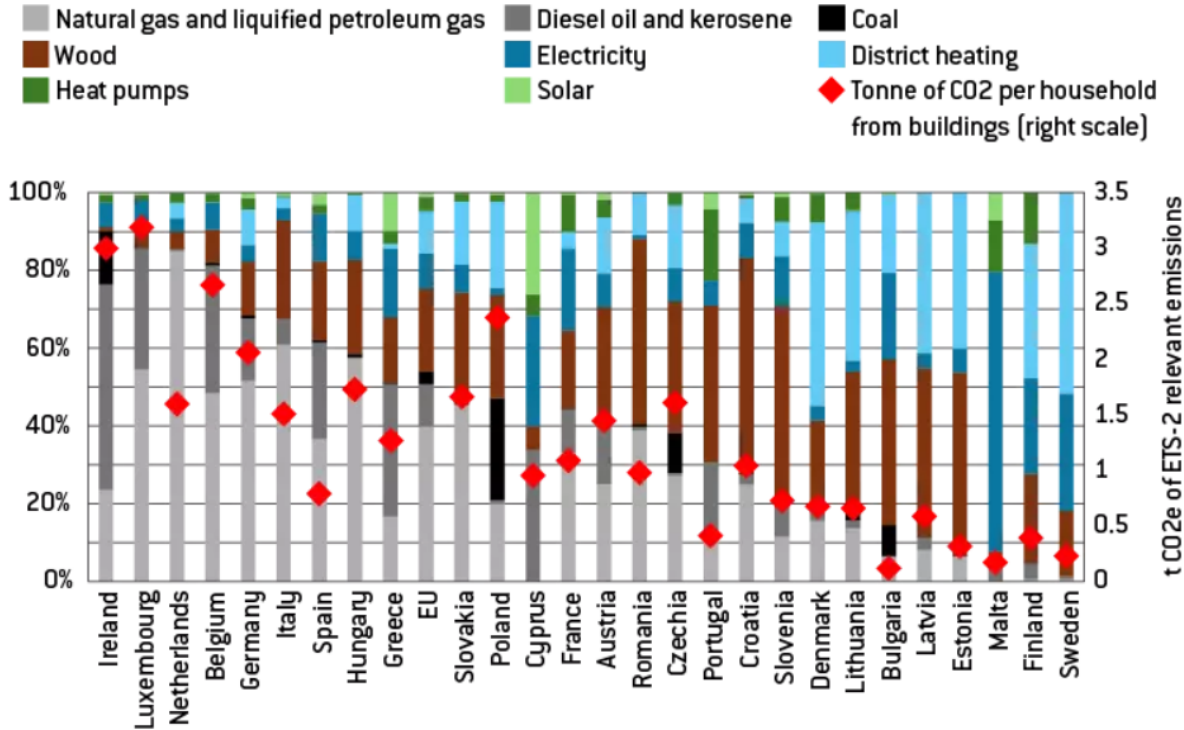
In fact, geopolitical tensions have also intensified domestic debates about sovereignty and control of energy sources.<sup>25</sup> The upcoming ETS2 is politically sensitive beyond Czechia since it directly affects households and small businesses, particularly in lower-income and rural regions. The expected increase in fuel prices for road transport and building heating implies a risk of being perceived as an “external imposition” that could disproportionately impact ordinary citizens, despite social compensation through the Social Climate Fund (SCF), a legally bound counterpart to the ETS2, and national programmes for insulation, clean heating, and e-mobility (e.g. New Green Savings).<sup>26</sup> Therefore, the EU directive imposes a responsibility to protect the most vulnerable and susceptible groups from price increases. Populist political actors and parts of the far-right have already described it as an EU-imposed obstacle and

<sup>24</sup> Wickenden, Luke, Martin Vladimirov, and Isaac Levi. 2024. Tapping the Loophole: Czechia Has Spent Five Times More on Russian Oil and Gas than Aid to Ukraine. Brussels: Centre for Research on Energy and Clean Air (CREA) and Center for the Study of Democracy (CSD).

<sup>25</sup> Tomasz Havranek, “Energy Security in Central Europe after the Russian Invasion,” *Energy Policy Journal* 42, no. 2 (2023): 55–69.

<sup>26</sup> European Commission. “Revision of the EU Emissions Trading System (ETS): Questions and Answers.” Brussels, 2023.; Ministry of the Environment of the Czech Republic. *Nová zelená úsporám (New Green Savings Programme)*. Prague, current programme documentation.

threat, thus undermining trust in European climate policies. The ETS2 can thus be perceived either as a tool for national resilience and autonomy, or a source of political division.<sup>27</sup>



**Fig. 2:** Heating mix of EU countries and emissions per households from ETS II-covered heating commodities.<sup>28</sup>

Furthermore, following climate agreements and phasing out fossil fuels, there are several possible models and frameworks that Czechia could adopt, and is already adopting in certain cases, to take steps towards energy self-sufficiency. According to the National Energy and Climate Plan of the Czech Republic (NECP), updated in December 2024, the key targets include reaching a 30% share of renewable energy sources (RES) in gross final energy consumption by 2030, increasing the RES share in electricity generation from 16.5 % in 2023 to 28 % by 2030 and further to 46 % by 2050.<sup>29</sup> The NECP emphasises increased energy efficiency, building renovations, heat-pump deployment, and improved transport efficiency via modal shift and electrification. The Czech NECP is built on the assumption that absolute energy demand will decline, not only the carbon intensity, therefore, fossil-fuel demand and imports are projected

<sup>27</sup> EUROPEUM Institute for European Policy, Public Perception of the Green Deal and Climate Policy in Central Europe: The Case of the Czech Republic (Prague: EUROPEUM, 2023); iDNES.cz, “SPD kritizuje klimatickou politiku EU a plán ETS2 jako ‘zelenou daň pro obyčejné lidi,’” iDNES.cz, April 14, 2024.

<sup>28</sup> Jüngling, Eva, Giovanni Sgaravatti, Simone Tagliapietra, and Georg Zachmann. 2025. Making the Best of the New EU Social Climate Fund. Bruegel Policy Brief No. 14/2025. Brussels: Bruegel.

<sup>29</sup> MPO, Národní energeticko-klimatický plán České republiky (NEKP) – aktualizace 2024.

to decrease significantly by 2030. Moreover, the ambition is to completely phase out coal mining and combustion by 2033. While the strategic goals are ambitious, the plan acknowledges the very large investment need and that infrastructure development must keep pace with the deployment of renewables. Moreover, achieving the import-reduction target, from approximately 42 % today to 26 % by 2050, depends significantly on the success of supply substitution, scale-up of alternative fuels, aligned delivery, and demand-reduction measures.<sup>30</sup>

Placing these energy self-sufficiency and decarbonization models into the European context, Germany offers an example of both similar ambitions and distinct challenges. Despite Germany's historical reliance on coal and nuclear energy, nowadays, the renewable share growth in electricity is strong (over 50 %), although the heating and transport sectors still lag behind.<sup>31</sup> In both Czechia and Germany, transport and heating remain critical areas for reducing import, highlighting a significant gap between the current situation and strategic goals. The question remains how the implementation of ETS2 will affect these sectors, particularly whether it will enhance EU energy self-sufficiency and, if so, to what extent it can support efforts to phase out gas and oil imports.

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<sup>30</sup> MPO, Národní energeticko-klimatický plán České republiky (NEKP) – aktualizace 2024.

<sup>31</sup> European Environment Agency (EEA), Country Profile: Germany – Progress towards Climate and Energy Targets (Copenhagen: EEA, 2023).

## ETS How Much?

The predictable direct and indirect consequences of ETS2 implementation are as follows. The ETS2 will make the use of fossil fuels in household heating and private transport more expensive. The expected carbon price between €45 and €80 per tonne of CO<sub>2</sub> equivalent emissions (with the median scenario around €55) for road transport and buildings would translate into an increase of approximately €0.12–€0.14 per litre of petrol or diesel and around 5–8 % higher household gas bills (under the price of €50/tCO<sub>2</sub> eq.).<sup>32</sup> This naturally affects Czech households and small enterprises, especially in rural areas dependent on cars and gas heating. All revenues from ETS2 will be channelled toward climate and social objectives through the EU Social Climate Fund (SCF) and national programs. Czechia is expected to receive roughly €1 billion per year from the SCF and ETS2 revenue streams, supporting energy-efficiency renovations, clean heating technologies, and sustainable mobility.<sup>33</sup> National and European initiatives such as New Green Savings, funded from the Modernisation Fund, align with this revenue mechanism.<sup>34</sup> Furthermore, fuel suppliers, such as ČEZ, MND, and E.ON<sup>35</sup>, will become the main obligated entities, responsible for buying and surrendering allowances. This opens up possibilities for them to invest in renewable and low-carbon fuels (biogas, hydrogen, synthetic fuels) and to promote electrification of heating and transport, depending on their willingness and strategic plans.<sup>36</sup> However, heating plants already pay for CO<sub>2</sub> allowances under ETS1, while households consuming this heat may fall under ETS2, and without careful regulatory coordination, this could lead to double carbon pricing, undermining the competitiveness of district-heating networks.<sup>37</sup> Even though the Czech NECP states that the government will ensure that fuels used in installations covered by the existing ETS are excluded from ETS2 obligations to avoid double charging of emissions, the technical implementation is still being designed.<sup>38</sup>

## Diversification and Decarbonisation: where to next in this D&D strategy?

In order for ETS2 to effectively reduce dependency on foreign oil and gas, there are potential requirements which must be satisfied across regulatory, economic, technological, and social

dimensions. The ETS2 must provide a clear and sufficiently high carbon price to make fossil fuels more expensive than domestic low-carbon alternatives, such as heat pumps, biomass, or rooftop photovoltaic systems.<sup>39</sup> Supportive national policies, including building renovation schemes, electrification initiatives, renewable deployment targets under the Czech NECP 2024, subsidies for households and small enterprises and other co-financing programs are necessary to facilitate switching away from fossil fuel sources.<sup>40</sup> Furthermore, there must be sufficient renewable energy capacity and grid flexibility to integrate variable renewable solutions efficiently, such as district heating modernisation, charging infrastructure for electric vehicles, or local biofuel production.<sup>41</sup> Therefore, the successful implementation of such incentives is contingent upon public acceptance – without broad societal support, the transition of the energy system toward more sustainable practices would be further delayed, thereby constraining the immediate impact on reducing imported oil demand. Since 70–80 % of Czech oil consumption goes into domestic transport sector<sup>42</sup> and Czechia’s car ownership rate is among the highest in Central Europe<sup>43</sup>, the future focus should be directed to vehicle fleet turnover, electrification, strengthening the public transport infrastructure and accessibility, mitigation of transport poverty, well-established bike- and car-pooling schemes, enhancing permeability of public spaces and commercial transport efficiency.<sup>44</sup>

Considering all the current constraints, we assume that in the short- and medium-term projections, reductions in oil and gas import volumes are likely to remain in the single-digit percent range. Consequently, Czechia is expected to continue relying heavily on foreign energy supplies throughout the next decade.<sup>45</sup> According to data from the Ministry of Industry

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<sup>32</sup> Öko-Institut, ETS II and Fuel Price Impacts in the European Union: Modelling Results (Berlin: Öko-Institut Policy Paper, 2024).

<sup>33</sup> MPO, Národní energeticko-klimatický plán České republiky (NEKP) – aktualizace 2024.

<sup>34</sup> Státní fond životního prostředí (SFŽP), Program Nová zelená úsporám Light: Podmínky a Pravidla (Praha: SFŽP, 2024); Ministerstvo životního prostředí (MŽP), Kotlíkové dotace 2024 (Praha: MŽP, 2024); MPO, Modernizační fond – Investiční Programy (Praha: MPO, 2024).

<sup>35</sup> ČEZ is a majority state-owned energy company headquartered in the Czech Republic, MND is a Czech energy company focused on oil and natural gas exploration and production, and E.ON is a large German multinational energy company operating in Europe.

<sup>36</sup> MPO, Zpráva o stavu energetiky České republiky 2024 (Praha: MPO, 2024).

<sup>37</sup> HFW. “EU ETS2 — Testing the Boundaries of Cap and Trade Systems.” HFW insights (legal commentary). Accessed 2025.

<sup>38</sup> MPO, Národní energeticko-klimatický plán České republiky (NEKP) – aktualizace 2024.

<sup>39</sup> Öko-Institut, ETS II and Fuel Price Impacts in the European Union: Modelling Results (Berlin: Öko-Institut Policy Paper, September 2024); Bruegel, Making the Best of the Social Climate Fund (Brussels: Bruegel Policy Brief, 2023).

<sup>40</sup> MPO, Národní energeticko-klimatický plán České republiky (NEKP) – aktualizace 2024.

<sup>41</sup> International Energy Agency. *Net Zero by 2050: A Roadmap for the Global Energy Sector*. Paris: IEA, 2021.

<sup>42</sup> International Energy Agency (IEA). Country Profile: Czechia – Oil Products Consumption. Paris: IEA, 2023

<sup>43</sup> Eurostat. 2024. “Passenger Cars per 1 000 Inhabitants Reached 560 in 2022.” Eurostat News, January 17

<sup>44</sup> European Commission. “Sustainable and Smart Mobility Strategy.” European Commission, 2020.;

International Energy Agency. *The Future of Mobility: Clean, Shared, and Automated Transport for All*. IEA, 2023.

<sup>45</sup> Eurostat. “Energy imports and imports dependency — 2025 edition.” Luxembourg: European Union, 2025.;

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and Trade, the country's overall energy-import dependency rose from 27.9 % in 2013 to 41.6 % in 2023.<sup>46</sup> Given that domestic production of crude oil and natural gas remains negligible, making Czechia almost entirely dependent on imports of these fuels, this persistent dependence underscores the urgency of strategic energy planning, including diversification of energy sources, accelerated deployment of domestic renewables, and strengthened energy-efficiency and security measures.<sup>47</sup>

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<sup>46</sup> Ministry of Industry and Trade of the Czech Republic, *Energetická dovozní závislost České republiky v letech 2013–2023* (Prague: MPO, 2025).

<sup>47</sup> Ministry of Industry and Trade of the Czech Republic, *Energetická dovozní závislost České republiky v letech 2013–2023* (Prague: MPO, 2025).

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