Topics Presented by the Estonian Business Delegation at COP31

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Energy and Infrastructure

Utilitas

Problem. Europe imports around 60% of the energy it needs. In 2025, these imports cost €337 billion, or approximately €1 billion per day. Dependence on imports weakens competitiveness and makes Europe more vulnerable. At the same time, electricity demand is growing, partly driven by data centres.

Solution. Europe urgently needs more locally produced renewable energy. In cities, district heating is one of the most efficient solutions, as it can combine multiple local energy sources. **Utilitas integrates local biomass, renewable electricity, heat recovered from wastewater and seawater, and waste heat from data centres into its district heating network. In the late 2000s, natural gas accounted for nearly 90% of the energy used in Utilitas' district heating systems. By 2027, more than 90% will come from renewable sources and waste heat.**

Impact. Urban heating becomes less dependent on imported fuels and makes use of energy that would otherwise go to waste. By connecting electricity and heating systems, district heating also improves the reliability of both.

Sunly

Problem. Electricity accounts for only around 22% of Estonia's final energy consumption. Much of the remaining demand is met by fuels, leaving the economy dependent on imports. The technologies needed for electrification already exist, but their adoption remains slow. The COP31 Presidency has set a global target to increase electricity's share of final energy consumption to 35% by 2035.

Solution. Estonia should aim to reach at least 35% electrification by 2035 and develop roadmaps for electrifying industry, transport and heating. Electrification also benefits existing consumers: the more electricity used through the grid, the lower the network tariffs can become. An additional 1 TWh of electricity consumption in Elektrilevi's network could reduce network tariffs by up to 13%. **Sunly develops solar, wind and energy storage projects to provide the locally produced clean electricity and flexibility needed for electrification.**

Impact. Locally produced renewable electricity replaces imported fuels, strengthens energy security and lowers energy costs. For businesses, this means lower operating costs and improved competitiveness.

Rail Baltic Estonia

Problem. Transport accounts for around a quarter of the EU's greenhouse gas emissions, with emissions still higher than in 1990. More than 70% of transport emissions come from road transport. The Baltic states still lack a modern railway connecting them to the rest of Europe.

Solution. To reduce emissions, more passengers and freight need to shift from roads to rail. In 2022, rail carried 16.6% of freight and 8.1% of passengers in the EU, while accounting for only 0.3% of transport emissions. **Rail Baltic Estonia is building approximately 213 km of fully electrified railway in Estonia, connecting Estonia, Latvia and Lithuania to Poland and the wider European rail network.** Dozens of wildlife overpasses and crossings will be built to protect nature.

Impact. Shifting freight and passengers from roads to rail reduces emissions, air pollution and noise while improving transport safety. Rail Baltica is the first cross-border infrastructure project in European history to be implemented jointly by more than two countries.

Bioforce

Problem. Europe has the potential to produce more than 400 TWh of biomethane annually, but current production is only around 60 TWh. Biomethane helps reduce greenhouse gas emissions and strengthen energy security by replacing fossil natural gas.

Solution. The sector needs a regulatory framework that supports investment. **Bioforce produces biomethane from agricultural by-products and organic waste, replacing natural gas in transport and industry. The company's plants have a combined annual production capacity of 250 GWh, with new facilities being developed in Estonia, Latvia and Poland.**

Impact. Lower greenhouse gas emissions and more locally produced green energy.

Circular Economy, Materials and Digital Solutions

Ragn-Sells

Problem. Europe imports a large share of its critical raw materials, such as magnesium and phosphorus, from China, Russia and other non-EU countries. This drives up prices, weakens competitiveness and indirectly finances wars. At the same time, many of these raw materials

are already available in Europe, locked in industrial waste such as oil shale ash and sewage sludge.

Solution. Industrial waste should be treated as a resource rather than a cost. **Ragn-Sells has developed technologies to recover valuable materials, including magnesium, calcium, phosphorus and nitrogen, from industrial waste and bind CO_2 in construction materials. Oil shale ash alone could supply up to 30% of the EU's annual magnesium target.** Clear EU regulations are needed to scale up these solutions, but they are still being developed. For example, the EU lacks the infrastructure needed to transport CO_2. There is also no agreement on when CO_2 is considered permanently stored or who is responsible for CO_2 removed from the atmosphere. At COP31, Ragn-Sells will organise five events at the Estonia Pavilion to showcase its solutions and highlight these barriers.

Impact. Reduced dependence on non-EU countries, stronger European industry, defence and food production sectors, and less mining.

Mulieres

Problem. Most laundry and cleaning products are made from fossil-based raw materials and sold in single-use plastic packaging. This puts pressure on the climate and aquatic environments. In Tallinn, domestic wastewater reaches the Baltic Sea in approximately 24 hours. Nearly 85 million people live along the Baltic Sea coast.

Solution. Fossil-based ingredients need to be replaced with natural, biodegradable alternatives, while the amount of plastic used in packaging must be significantly reduced. **Mulieres produces laundry and cleaning products made from 100% natural ingredients, which biodegrade by 97–100% within 28 days, according to laboratory tests. Its packaging contains up to 70% less plastic than conventional packaging.** Mulieres is the first Estonian company to receive Ragn-Sells' Gold Certificate for Circular Economy.

Impact. Less plastic and fewer chemicals enter the sea, while production and packaging generate fewer emissions. The company demonstrates that natural household cleaning products can be just as effective and competitive as conventional alternatives.

WasteLocker

Problem. Energy, water and materials are wasted on a massive scale. For example, around 126 billion cubic metres of water are lost or go unpaid for in water distribution networks worldwide each year, representing an annual value of approximately €35 billion. Energy efficiency improved by nearly 2% in 2025, only half the agreed pace. Although businesses and

governments collect data, data alone does not show which changes would deliver the best results.

Solution. Data should be used to understand the potential impact of changes before decisions are made. **WasteLocker creates digital twins – digital models of buildings, infrastructure and processes that allow changes to be tested before implementation. These models are based on the laws of physics and artificial intelligence, enabling them to work even with limited or fragmented data while making use of existing systems.** In practice, this helps optimise heating, cooling and ventilation, monitor waste sorting, and identify water quality issues and sources of pollution.

Impact. Lower energy and water consumption, less waste, cleaner air and water, and better-informed investment decisions. At the national level, reliable data helps translate climate goals into measurable results.

Land, Food and Forests

eAgronom

Problem. European agricultural soils are losing carbon. Carbon-depleted soils contain fewer nutrients, retain less moisture and are more vulnerable to droughts and floods. Soil is a larger carbon store than forests: the world's topsoil contains approximately 2,011 billion tonnes of carbon, compared to around 295 billion tonnes in forests. Agriculture is one of the few sectors that can produce food while also removing CO_2 from the atmosphere and storing it in the soil.

Solution. Carbon sequestration must become financially rewarding for farmers. In July 2026, the EU approved rules for soil carbon certification, but buyers are now needed. **eAgronom helps farmers adopt soil-friendly practices, such as cover cropping and reduced tillage. The amount of carbon stored in the soil is then measured and the results verified by independent auditors. These verified results become carbon credits that farmers can sell to earn additional income.** The platform is used by 3,500 farms across ten countries, covering 2.5 million hectares. On average, eAgronom's programmes sequester around one tonne of CO_2 per hectare annually.

Impact. CO_2 is stored in the soil, soils become more resilient to droughts and excess water, crop yields become more stable, and farmers gain a new source of income.

Kappazeta

Problem. Forests absorb around a third of global annual CO_2 emissions, but national forest inventories are often conducted only every 5 to 10 years. As a result, governments, landowners and carbon markets lack up-to-date, reliable information on where logging takes place and how

much carbon is stored in forests. This also limits access to climate finance. For example, the $5.5–6.6 billion fund for Brazil's tropical forests depends on reliable monitoring and verification.

Solution. Forest monitoring needs to be continuous, transparent and independent. **Kappazeta uses satellite data and artificial intelligence to monitor forest changes in near real time and estimate forest biomass and carbon stocks. The company has developed an automated clear-cut detection system for the Estonian government, with an accuracy of over 95%. Together with international partners, it is also developing its own radar satellite to provide up-to-date forest data.**

Impact. More accurate forest carbon accounting, more reliable carbon markets, lower monitoring costs and earlier detection of risks.

FRED (Fred EcoData OÜ)

Problem. Solar and wind farm developers, as well as the banks financing their projects, often lack timely information about the nature-related risks associated with specific plots of land. Environmental impact assessments are carried out manually and on paper. This leads to months of delays in obtaining permits, unexpected additional costs and slower investment. When assessing green loans, up to 70% of meeting time is spent evaluating nature-related risks.

Solution. Nature-related risk assessments need to become automated and location-specific, with the results directly integrated into permitting and financing decisions. **FRED is an AI- and satellite data-powered platform that automatically assesses nature-related risks at the level of individual land parcels. It enables faster site assessments and cuts the time and cost of initial ecological assessments in half compared to manual consultancy work.** The platform combines satellite, land cover, soil carbon and protected area data to predict risks such as soil erosion, flooding and habitat fragmentation throughout a project's lifetime. Its assessments comply with international nature-related risk reporting requirements (TNFD and CSRD).

Impact. Renewable energy projects can obtain permits and financing faster, while the risk of unexpected costs is reduced. In well-designed solar parks, vegetation growing beneath the panels helps the soil store more carbon and protects it from erosion. The cooling effect of plants also increases electricity generation from solar panels.

RMK (State Forest Management Centre)

Problem. Estonia is not yet making sufficient use of sustainably grown wood to produce high-value products. This is particularly true for lower-quality wood, such as pulpwood, firewood and wood chips, much of which is exported as raw material or used for energy

production. New industrial investments and value chains take years to develop, making it important to build relationships with investors and technology companies now.

Solution. More wood should be used to produce materials and products, such as new wood-based materials and biochemicals. This requires bringing together wood resources, research, technology and investors. **As the manager of Estonia's state forests, RMK provides sustainably grown wood and a secure long-term supply of raw materials, which is essential for new industrial investments. RMK also brings together investors, technology companies and research institutions interested in developing new wood-based value chains in Estonia.** At COP31, RMK is looking for partners who can create greater value from pulpwood, firewood and wood chips in Estonia.

Impact. New materials, products, investments and jobs are created in Estonia, while wood-based raw materials replace fossil-based alternatives. The goal is to ensure that as much of the value generated from wood grown in Estonia as possible stays in Estonia.

Estonian University of Life Sciences

Problem. Climate change threatens food production and water availability through heatwaves, droughts, floods, new pests and plant diseases. Many Middle Eastern countries rely on seawater desalination, which is expensive and resource-intensive, even though wastewater treatment would be much simpler. In countries with extreme climates, food increasingly needs to be grown indoors and close to consumers.

Solution. Food production must use less water and make greater use of recycling. **At COP31, the Estonian University of Life Sciences will demonstrate two aquaponics systems in which fish and plants are grown within the same water circulation system. Waste produced by the fish provides nutrients for the plants, while the plants clean the water before it is returned to the fish.**

Impact. In aquaponics systems, waste that would otherwise pollute water becomes fertiliser for plants, and the same water is reused repeatedly. This enables food production with less water and pollution, even in water-scarce regions. More broadly, the university's research helps improve the climate resilience of agricultural and horticultural crops, develop sustainable food systems and climate-smart forestry, and improve soil and water quality.

Soyl Food

Problem. Around one-third of the world's soils are degraded, and agriculture accounts for approximately 70% of global freshwater use. Farmers depend on synthetic fertilisers, which have a significant climate impact, while effective natural alternatives that comply with EU

requirements remain limited. In arid regions, heat, soil salinity and water scarcity are already reducing crop yields.

Solution. Rather than simply replacing nutrients, the focus should be on helping plants and soil function better naturally. **Soyl Food is developing an algae-based biostimulant that helps plants absorb nutrients more effectively, develop stronger roots and withstand heat and drought.** The product is being tested under challenging conditions in Pakistan and Abu Dhabi and is being developed to comply with the EU Fertilising Products Regulation.

Impact. Healthier soils, reduced dependence on synthetic fertilisers, more stable crop yields and greater food security in regions vulnerable to climate change, including Southern Europe.

Finance, Business and Advisory Services

Luminor

Problem. Baltic businesses are not prepared for the transition to a lower-emission economy. They lack transition plans and standardised sustainability data that banks need to assess risks. For banks, climate risk is financial risk: without a clear transition plan, businesses face more expensive loans and greater difficulty accessing financing. Some sectors may no longer be able to secure financing in the future.

Solution. Better climate risk data, government guarantees that cover part of the risk, and sector-specific transition guidelines are needed. **Luminor advises businesses on developing transition plans, using its own guidelines and a database of emission reduction measures. For three years, the bank led the Estonian Banking Association's sustainability working group, which laid the foundation for the Baltic emissions calculator, harmonised banks' climate risk questionnaires and introduced sector-specific transition guidelines in Estonia and Lithuania.**

Impact. Baltic businesses remain eligible for financing, their administrative burden is reduced, and private capital flows into projects with measurable impact.

Miltton New Nordics

Problem. Many organisations still see climate change as an issue that does not directly affect them and struggle to assess their own impact. People expect change but doubt their ability to make a difference: 42% of Estonians expect solutions to the climate crisis within the next ten years, yet only 35% believe their own choices can make a difference. A third of companies are hesitant to act because they are uncertain whether green investments will pay off.

Solution. Organisations need practical tools to understand and manage their impact. **Miltton helps organisations assess their impact, develop sustainability strategies and manage change. It also provides guidance on how to communicate their actions honestly and avoid misleading environmental claims.** In 2026, Miltton is supporting greater visibility and influence for women in leadership and decision-making roles.

Impact. When companies understand their impact, they become more confident in making sustainable investments. When businesses participate in public debate, decisions become more balanced and resistance to change decreases.

Sustinere

Problem. The future resilience of businesses increasingly depends on their ability to turn environmental, resource-related and supply chain challenges into new products and business models. European studies on industrial symbiosis and clusters show that supply chain collaboration projects often lack clear leadership, a shared business rationale and effective cooperation. **The scale of the problem is also reflected in a WTW study, which found that more than 92% of large companies do not have full control over their supply chain risks.**

Solution. The development of sustainable products and business models needs to move beyond individual companies and extend across entire value chains. **Sustinere aims to bring together companies across value chains, help them define shared business and environmental objectives, agree on how collaboration will work and launch initial pilot projects to test solutions in practice.** The relatively small size of Estonia and the Baltic region allows solutions to be tested quickly and, if successful, exported to other markets. Since 2016, Sustinere has supported more than 200 organisations in developing sustainability strategies.

Impact. Greater competitiveness and export potential, more reliable supply chains, more efficient resource use and stronger collaboration.

Public Sector, Research and Civil Society

Association of Estonian Cities and Municipalities (AECM)

Problem. National climate goals often remain on paper because local governments lack the funding, expertise and effective models needed to implement them. Estonia's 78 municipalities vary greatly in their capabilities, yet climate-related crises, such as storms and disruptions to essential services, do not respect municipal boundaries.

Solution. Local governments need practical support rather than just guidelines: cooperation with neighbouring municipalities, shared resources, joint emergency response networks and

funding to implement climate and energy plans. **AECM acts as a bridge between the national government and Estonia's 78 municipalities. It represents local government needs in national and international strategies and leads R-Klubi, a network of municipal climate and environmental managers who share experiences and best practices.** AECM also participates in the steering group of the Climate Change Adaptation Hub and the Interreg ClimaResponse project.

Impact. When neighbouring municipalities cooperate during crises, district heating, water supplies and road access can be restored more quickly after storms or power outages, providing better protection for residents. Climate goals are also translated into local decisions, as municipalities are responsible for spatial planning, land use, building permits and local energy production. By sharing resources and expertise, municipalities can avoid unnecessary duplication of costs.

KELL (Association for Sustainable Business)

Problem. Businesses are increasingly expected to contribute to climate goals, but many, especially smaller companies, lack a simple and affordable way to assess their current performance and identify next steps. International standards and certification processes are complex and expensive for them. At the same time, there is a growing need for reliable information: a European Commission study found that more than half of companies' environmental claims were vague, misleading or unfounded. Stricter EU rules have been in force since 27 September 2026.

Solution. Businesses need a clear and practical tool that is also suitable for smaller companies. **KELL's Responsible Business Index helps companies assess how well sustainability is integrated into their management and strategy, receive independent feedback, compare their performance with others and identify areas for further improvement.** KELL brings together more than 100 organisations that share experiences and develop solutions collaboratively.

Impact. The Index results show that participating companies have improved their sustainability management across all three assessed areas, with the greatest progress in climate and environmental performance. This strengthens their competitiveness in export markets, supply chains and as employers.

The Green Tiger Foundation

Problem. The global economy is consuming natural resources faster than nature can regenerate them, and current climate commitments are insufficient to meet the Paris Agreement goals. The main obstacle is not a lack of solutions but fragmentation: ministries, local governments, businesses and civil society often work independently of one another.

Solution. Stakeholders need to be brought together to agree on a shared goal, develop a common plan and put it into action. **Working with nearly 300 companies, universities and government institutions, The Green Tiger Foundation has developed five sectoral roadmaps covering energy, construction, transport, land use, and industry and the circular economy, along with an overarching roadmap connecting them and the Vision for a Balanced Economy 2040.** The Green Tiger Foundation's business association brings together nearly 90 companies.

Impact. Agreed measures reinforce one another, making the transition faster and less costly. Estonia's Ministry of Climate has used the roadmaps when setting objectives for the Climate-Resilient Economy Act. Estonia offers other countries a tested model for how governments, businesses, the public sector and researchers can agree on a common plan.

Tallinn University

Problem. Climate discussions often lead to misunderstandings because people approach the issues with different assumptions. Most people support stronger climate policies but underestimate how many others share their views. This is particularly relevant now, as climate plans are moving into local implementation, where people from very different backgrounds need to reach agreements.

Solution. Different assumptions need to be made explicit and discussed openly. **Tallinn University has developed a discussion format called the "Thinking Change Mini-Lab", where participants do not try to convince one another but instead explore the assumptions behind each other's views. At COP31, the university will organise mini-labs at the Estonia Pavilion, giving participants the opportunity to experience the method firsthand.** Tallinn University is also developing educational materials on climate myths and engaging people in citizen science.

Impact. Shared decisions can be reached even when participants do not agree on everything. The method is low-cost, can be applied in other countries and is supported by publicly available materials.

TalTech

Problem. Society needs lower-carbon technologies, but research-based solutions are often slow to reach practical application. One of the most effective ways for cities to adapt to heatwaves is to plant more trees, which provide shade and cool urban areas. However, complex underground infrastructure often makes tree planting difficult, leaving cities reluctant or uncertain about how to proceed. The circular economy also requires collaboration across different research disciplines to turn waste into valuable resources.

Solution. Cities need practical tools to navigate complex infrastructure and plan green spaces more effectively. **At COP31, TalTech's FinEst Centre for Smart Cities will present Herbarium AI, a ready-to-use digital solution that helps cities identify suitable locations for planting trees in urban areas with complex infrastructure.** TalTech will also introduce its Circular Economy Core Laboratory, which helps industry and society address the technological challenges of transitioning to a circular economy.

Impact. Cities save money by avoiding tree planting in locations where trees cannot thrive, while green infrastructure planning becomes more evidence-based. The Circular Economy Core Laboratory serves as a single point of contact between the university, businesses and the public, helping to conserve resources and providing a scientific foundation for business innovation.

ICOMOS Estonia

Problem. The role of cultural heritage in addressing climate change has long been underestimated. Heritage is threatened by climate change, but it also offers solutions through traditional knowledge of construction, water management and food production. At COP30, culture and heritage were officially included in climate policy for the first time in the history of UN climate negotiations. These decisions now need to be put into practice.

Solution. Heritage needs to be integrated into national climate and adaptation plans through concrete, measurable actions. **ICOMOS and ICOMOS Estonia are founding partners of three international heritage initiatives. The Heritage Adapts! campaign aims to help at least 3,000 heritage sites and cultural practices take local climate adaptation measures by 2030.** Heritage Now! focuses on using historic buildings as a climate solution, while the Group of Friends of Heritage-Based Solutions, involving nearly 70 countries and knowledge partners, works to integrate cultural heritage and heritage-based climate solutions into national adaptation plans.

Impact. The heritage sector moves from recognition to implementation, providing countries with practical tools to adapt to climate change through heritage.

Let’s Do It World

Problem. The climate crisis, waste, overconsumption and a growing digital footprint are weakening the resilience of societies. Citizens are often seen as target audiences rather than agents of change, even though collective action is an essential part of building societal resilience.

Solution. Governments should integrate citizen movements into their climate and crisis preparedness strategies. **For more than a decade, Let's Do It World has brought people together through World Cleanup Day, mobilising over 139 million people in more than 211**

countries. The same network also supports communities during crises. For example, during the war, Let's Do It Ukraine has redirected its network towards helping local communities. At COP31, Let's Do It World will organise a panel discussion at the Estonia Pavilion on 18 November, exploring the role of citizen movements in strengthening national resilience.

Impact. Taking part in collective cleanups gives people firsthand experience of their ability to create change together. Participants become more active, trust and cooperation within communities grow, and societies become more resilient in times of crisis. Let's Do It World's network operates in more than 164 countries, allowing governments and communities to draw on existing structures for environmental action and crisis response without having to build new systems from scratch.