

invest
estonia

Estonian Hydrogen Directory



preface

This directory is a collaborative effort by Invest Estonia, a government agency advancing the future of foreign investments, and experts from Hydrogen Valley Estonia. The document thoroughly explores Estonia's hydrogen value chain to further develop it in cooperation with local know-how and international organisations.

Data for this list is pulled from various sources across the ecosystem and the Invest Estonia database, up to date as of November 2024.

Companies and organisations are categorised based on their core activities within the hydrogen ecosystem. To avoid overlap, insights from ecosystem partners have been used to assign the most appropriate classification.

The final selection of companies showcases the high growth potential of Estonia's hydrogen ecosystem and reflects value chain growth internationally. Efforts have been made to balance representation across various hydrogen subcategories. Some areas, such as mobility decarbonisation, have a higher concentration of companies. Areas like industry decarbonisation have less representation on the market in comparison, leading to fewer companies named in this directory.

Sincerely,
Invest Estonia

Hydrogen

5



3



taxonomy and hydrogen value chain



Renewable energy

- Windpower
- Sunpower
- Biomaterial based



Production tech

- Electrolysis/ fuel cells
- Small modular reactors (SMR)



Hydrogen production

- Electrolysis
- Biomassenabled
- Fossil energy sources
- Pyrolysis



Storage

- Gasified hydrogen
- Liquid hydrogen
- Metalhydrates
- Chemical storage (ammonia, methanol, SAF)



Distribution

- Hydrogen-gas pipe
- Fuel cell heavy duty vehicles (HDV)
- Liquid organic hydrogen carriers (LOHC)
- Hydrogen refuelling stations (HRS)

-
- Combined Heat and Power (CHP)
 - 100% hydrogen distribution grid



Energy system integration



Decarbonise mobility

- Heavy duty vehicles (HDV)
- Aviation
- Maritime
- Railway

-
- H2 as feedstock for chemical industry (ammonia, methanol)
 - H2 as feedstock for e-fuels (aviation SAF, maritime)



Decarbonise industry feedstock



Decarbonise heat & power

- Combined Heat and Power (CHP)
- Electric distribution grid

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- Universities
 - Research centres
 - Point-of-contact agencies



R&D

ESTIKO ENERGIA



Kalev Lillo, Development manager
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Estiko Energia specializes in building advanced solar parks in Estonia, with 13 solar power plants totaling 2.3 MW in capacity. Six rooftop installations provide direct energy to buildings, while seven ground-based parks supply power to end users or the grid. In 2023, they launched the largest solar park in the Baltic and Nordic regions — a 100 MWp facility in Raadi, covering 106 hectares and powering nearly half of Tartu's households. Looking ahead, they aim to produce green hydrogen alongside their solar solutions.

Future prospect: Aim to establish a clean hydrogen production system alongside renewable energy generation and create a foundation for a value chain based on it.



Website

renewable energy

SAARE WIND ENERGY



Kuido Kartau, Board member
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Saare Wind Energy is a renewable energy company dedicated to developing large-scale offshore wind farms in the Baltic Sea. Currently, it is working on a project off the western coast of Saaremaa, where favorable wind conditions make it ideal for construction. The goal is to establish an offshore wind farm with up to 100 turbines and a capacity of 1,400 MW, along with a transmission system to connect to the general electricity grid. Committed to innovation, Saare Wind Energy aims to support the region's transition to renewable energy.

Future Prospect: Aim to establish a clean hydrogen production system alongside renewable energy generation and create a foundation for a value chain based on it.



Website

renewable energy



Priit Lepasepp, CEO and Founder of Sunly
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Sunly is an Estonian company specializing in the development and management of renewable energy projects, particularly in wind and solar energy. They offer comprehensive services from project inception to daily operations and focus on energy security and optimizing electricity consumption, helping clients reduce costs and improve efficiency. Active in the Baltic States and Poland, Sunly aims to promote clean energy globally. Their renewable energy portfolio includes solar and wind projects totaling 30.2 GW in planning and development, with operational solar parks currently generating 136 MW.

Future prospect: Hydrogen is set to play a vital role in future Baltic renewable projects, as technology matures and integrates into regional energy systems. This aligns well with ongoing hybrid park and energy storage developments.

Website



renewable energy

GREN



Margo Külaots, Gren's Estonia Business Director
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Gren develops and delivers decentralised energy solutions ranging from sustainable district heating and cooling to renewable and industrial energy. Gren is already an established energy supplier in Northern Europe, running approximately 600km of pipeline under cities in Finland, Estonia, Latvia and Lithuania. Gren's managed networks are a mainstay of heat consumption in Scandinavia and northern Europe.

Future Prospect: Lately, Gren expanded its footprint in the renewable energy sector by acquiring a stake in a Scottish energy-from-waste facility and purchasing the energy company Esro in Estonia. These strategic moves strengthened Gren's portfolio and commitment to sustainable energy solutions and entering into hydrogen value chain.



Website

renewable energy

VKG ENERGY



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VKG Energia is Estonia's second-largest electricity production company, committed to providing reliable energy solutions. Alongside electricity generation, they produce thermal energy and supply steam to industrial companies. As a subsidiary of Viru Keemia Grupp AS, VKG Energia operates the Põhja SEJ co-generation plant and manages extensive infrastructure, including electricity distribution networks, 43 substations, and steam and compressed air networks.

Future Prospect: Aim to look upon hydrogen as part of its broader strategy to transition towards greener industrial processes. While VKG remains primarily focused on oil shale, the company is actively exploring hydrogen alongside other renewable projects, including bio-product and plastics recycling initiatives.



Website

renewable energy

hydrogen production

EVECON

evecon

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Evecon's expert team is dedicated to advancing the Baltic green revolution by developing hybrid energy parks, combining wind, solar, and storage solutions. With deep roots in Saaremaa, they prioritize environmental care, community engagement, and educational support, aiming to lead the Baltics in sustainable energy with a science-based, community-focused approach.

Future Prospect: Hydrogen is set to play a vital role in future Baltic renewable projects, as technology matures and integrates into regional energy systems. This aligns well with ongoing hybrid park and energy storage developments.



Website

renewable energy

KC ENERGY



Mihkel Loorits, CEO
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KC Energy is a company focused on advancing renewable energy solutions with a strong commitment to sustainability. Specializing in wind and solar power, KC Energy is dedicated to increasing clean energy capacity in the Baltic region. To date, they have nearly 50 energy farms across Estonia — from Hiiumaa to Jõgeva and Lääne-Viru counties. They are also exploring emerging technologies to create efficient and eco-friendly energy infrastructure that aligns with the EU's green energy goals.

Future Prospect: Focus on securing green energy for hydrogen production while addressing future needs for balancing capacity through the use of green hydrogen as a CO₂-neutral fuel.



Website

renewable energy

VINDR



Marko Viiding, Head of Baltics
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Vindr plays a vital role in ensuring energy security and promoting sustainability throughout the lifecycle of its developments, benefiting communities in Estonia, Latvia, Norway, and Sweden. With a remarkable project portfolio of 2.3 GW spanning 48 projects across four countries, Vindr demonstrates its strong commitment to renewable energy solutions.

Future Prospect: The goal is to invest €300 million in Estonia by 2030, focusing on the development, construction, ownership, and operation of power plants.



renewable energy

Website

ZERO TERRAIN



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Zero Terrain, pioneer in energy storage, drives a secure and cost-effective clean energy revolution. By harnessing underground potential energy, they're transforming energy storage to overcome traditional geographical limitations. Their approach is inspired by conventional pumped-hydro energy storage, with a crucial difference: Zero Terrain PHS plants can be built on flat land, removing the geographic constraints of traditional systems. By collaborating with industry leaders, Zero Terrain PHS plants boost wind and solar profitability, support grid stability, and reduce energy costs.

Future Prospect: Aim to remove the barriers to affordable renewable energy and create a secure, clean future for the next generations.



renewable energy

Website



ELCOGEN



Enn Öunpuu, CEO

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Elcogen is a manufacturer of clean energy technology that delivers affordable green hydrogen and emission-free electricity. Their solid oxide fuel cell (SOFC) and solid oxide electrolyser cell (SOEC) technology is a key enabler in making the energy transition affordable for everyone. Elcogen has its registered office in the UK, and manufacturing facilities in Estonia and Finland that have served 160 customers in 30 countries.

Future Prospect: Aim to significantly impact the clean energy landscape by scaling up its production of solid oxide electrolyzer cells (SOECs) to enhance green hydrogen generation efficiency.

Website



production tech

H2ELECTRO



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H2Electro is a deep-tech startup specializing in hydrogen technology that utilizes advanced ceramic materials to create cost-effective Power-2-X solutions, with extended lifetime, contributing to the goals of the green transition. The innovative Solid Oxide Electrolysis Cells (SOECs) operate at temperatures ranging from 800 to 850°C, optimizing water electrolysis efficiency by minimizing electrical losses. Unlike traditional electrolysis stacks, their high-temperature electrolysis systems require no precious metals, offering a sustainable solution for green hydrogen production.

Future Prospect: Aim to enhance its role in the green transition by advancing high-temperature electrolyzer and fuel cell technologies. Through partnerships with industry and research institutions, the company seeks to improve the efficiency and affordability of hydrogen production.

Website



production tech

GALTTEC



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GaltTec is an innovative manufacturer of microtubular solid oxide fuel cells (SOFCs) renowned for their high power density, which allows for more energy output in a smaller footprint compared to competing technologies. Their advanced fuel cells have applications in drone technology, aerospace, transportation and off-grid, positioning GaltTec as a leader in clean energy solutions. Committed to sustainability, the company's products can operate on various fuels, including hydrogen, driving innovation in the energy sector.

Future Prospect: GaltTec's involvement in initiatives like NATO DIANA underscores its commitment to advancing fuel cell technology, crucial for energy resilience and sustainability. Their focus on practical applications enhances the role of hydrogen in clean energy transitions, aligning with global renewable energy efforts.

Website



production tech

POWERUP TECHNOLOGIES



Ivar Kruusenberg, CEO
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PowerUP Technologies is an innovative Estonian company specializing in hydrogen fuel cell technology. Founded in 2016, the company focuses on producing compact, efficient fuel cell generators designed to provide clean, reliable power for off-grid and portable applications. With a commitment to advancing green energy solutions, PowerUP's products serve diverse sectors, from marine and transport to defense and disaster relief, showcasing Estonia's role in the global hydrogen industry and green technology innovation.

Future Prospect: Deeply committed to making the hydrogen of tomorrow the reality of today.

Website



production tech

STARGATE HYDROGEN



Marko Vikerbau, CEO
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Stargate provides innovative solutions for producing green hydrogen through renewable energy sources. Their electrolyzers, utilizing advanced ceramic electrode materials, achieve high efficiency at low costs. Stargate Hydrogen offers innovative stacks and electrolyser systems for the production of green hydrogen, with engineering support that allows our clients to accelerate their hydrogen projects.

Future Prospect: Aim to play a pivotal role in the growing green hydrogen market by expanding its production capabilities and enhancing the efficiency of its electrolyzers.

Website



production tech

RAND HYDROGEN



Hando Rand, CEO
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Rand Hydrogen is a pioneering company planning to produce clean hydrogen in the future. They specialize in providing state-of-the-art solutions for pollution-free hydrogen production, distribution, and utilization. The company aims to engage in real estate development, designing production facilities, and procuring equipment along with installation and construction. With a commitment to innovation and environmental responsibility, Rand Hydrogen is set to begin hydrogen production in early 2024, contributing to a clean energy future by advancing hydrogen technologies for various industries and applications.

Future Prospect: Aim to establish collaboration throughout value chain and seeking investments.

Website



hydrogen production





Kaarel Kuusk, Head of Partnerships and Hydrogen Projects
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Eesti Energia AS, an Estonian government owned energy company which internationally is known under Enefit brand, is offering energy solutions to ~700 000 customers in 5 different home markets (Finland, Estonia, Latvia, Lithuania, Poland) in the Baltic Sea region. Enefit Green, the renewable energy subsidiary of Eesti Energia Group is the largest wind energy producer in the Baltic states. Their current wind and solar energy production capacity exceeds 500 MW, roughly 700 MW of onshore wind and solar PV assets are under construction at the moment. By 2030 the production capacity will be around 1.7 GW. In addition they have more development projects in their longer term portfolio as well as 2 offshore wind projects in Estonia each of them 1 GW capacity.

Future Prospect: Eesti Energia and its subsidiaries are working with different hydrogen projects at the moment: 1)we are developing a hydrogen based energy solution for B2C and B2B customers; 2)we are piloting a full chain green hydrogen project where our scope is to be the hydrogen producer and offtaker in transport sector; 3)our subsidiary Enefit Power is in the process of transforming its current fuel oil production business to chemical industry feedstock production business where hydrogenation is needed; 4)Eesti Energia Group is also analyzing the options to build hydrogen ready gas peak power plants in Estonia; 5)our subsidiary Enefit Solutions is interested to offer hydrogen technology assembly, design, installation and maintenance services to interested parties.

Website



renewable energy



hydrogen production

UTILITAS



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Utilitas is leading the way in sustainable transportation through its innovative green hydrogen pilot project, supported by a €5 million grant from Center for Environmental Investments, Estonia. This initiative promotes the use of green hydrogen in public transport with an integrated chain of production units, refueling stations, and vehicles. By establishing a pilot plant with an annual production capacity of 36,000 kg of clean hydrogen, Utilitas is committed to providing reliable, eco-friendly energy solutions for the future of public transportation.

Future Prospect: Estonia's largest renewable energy producer, Utilitas, will build Estonia's first green hydrogen production unit in Tallinn by the end of next year, which will be ready in 2026 and double its capacity.



renewable energy



hydrogen production

Website

DESTINY ENERGY ESTONIA



Vijay Sirse, CEO
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Destiny Energy, the Singapore based energy company is emerging as a leading developer and investor in the green hydrogen value chain eco-system in Estonia, the Baltics. The current pipeline of projects under development are structured as fully integrated solar to green hydrogen to green methanol projects, a first of its kind approach contributing towards Estonia's decarbonization efforts.

Future Prospect: Aim to advance sustainable shipping by promoting methanol as a fuel alternative, given its versatility across vessel types like ferries, bulk transport vessels, and container ships.



hydrogen production

Website

JETGREEN



Marko Tiiman, CEO
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JetGreen is the first and largest biomethane producer in Estonia and the Baltic States, operating as the sole owner of Rohegaas. They produce 50,000 to 60,000 MWh of renewable transport fuel annually, enough to supply city buses in Tartu, Pärnu, and partially in Tallinn, with a total biomethane output of 5.5 million cubic meters per year.

Future Prospect: Aim to initiate operations in the clean hydrogen sector, which is rapidly evolving and holds great potential for sustainable energy solutions. This includes developing robust production capabilities to generate clean hydrogen efficiently, meeting both local and regional demand.



hydrogen production

Website

KIVIÕLI KEEMIA TÖÖSTUS



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Kiviõli Keemiatööstus (KKT) is a company belonging to the Alexela Group and its main activities are oil shale extraction and the production of shale oil, thermal energy and power. KKT extracts oil shale in the North Kiviõli extraction site and nearly 1.5 million tonnes of oil shale is extracted annually. Combined heating and power production covers the heating needs of both the company and the town of Kiviõli. The power produced by KKT is consumed at the company and it is also forwarded to the distribution network.

Future Prospect: Besides their core business, there are potential pathways for hydrogen integration, particularly as the company looks to align with Estonia's climate goals and transition away from traditional fossil fuels.



hydrogen production

Website

ESTONIAN AVIATION FUELLING SERVICES



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Estonian Aviation Fuelling Services aims to deliver top-notch aircraft refueling services at Tallinn Airport. Annually, approximately 10,000 refueling operations are conducted in line with the highest international standards. The company supplies clients with Jet A-1 fuel and operates four refueling trucks, along with a storage facility that holds up to 400,000 liters of fuel.

Future Prospect: The adoption of hydrogen fuels and its derivatives in the aviation sector may necessitate the company's use of hydrogen in its operations and the modification of its infrastructure.



storage

Website

JETGAS



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JetGas is a leading LNG supplier in the Baltic States, specializing in LNG import, delivery, regasification, and natural gas supply. They also provide biomethane and other clean fuels. As the market leader with extensive experience, JetGas primarily serves industrial clients that heavily rely on energy. Operating on a BOO (build, own, operate) model, they install and manage all equipment for LNG storage and regasification at client sites, ensuring a seamless fuel supply chain from import to delivery.

Future Prospect: There are significant opportunities for supplying clean hydrogen in Estonia and the Baltic States, driven by the growing demand for sustainable energy solutions and the region's commitment to reducing carbon emissions.



storage



distribution

Website

LIWATHON E.O.S



Mart Kabel, Commerce and Logistics Manager
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Liwathon E.O.S is a company in the energy and fuel sector that primarily offers liquid fuel storage solutions. Operating in Estonia (Muuga Port), the Bahamas, and the UK, it is the largest independent operator of petroleum product terminals in the Baltic Sea. At Muuga Port, they provide a wide range of high-quality liquid fuel handling, throughput, and storage services, supported by an integrated infrastructure of land terminals, blending facilities, pipelines, and railways for efficient maritime and rail transport.

Future Prospect: Prospect a prime opportunity to establish a hydrogen terminal in their port areas to receive and store hydrogen, as well as to create a hydrogen hub in Muuga, located in the Baltic Sea.



storage

Website

LINDE GAS



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Linde Gas, is the largest industrial gas company in the world by revenue and market share. In Estonia, Linde Gaas OÜ supplies gases produced abroad, including hydrogen. With a strong vision to become the leading producer of clean hydrogen, Linde Gas has established hydrogen transport infrastructure through vehicles and pipelines and plans to operate across all sectors of the clean hydrogen value chain. They provide gases globally.

Future Prospect: The goal is to establish supply and storage options for clean hydrogen in Estonia and, if feasible, to bring a clean hydrogen production facility to the country.



storage



distribution

Website

ELME MESSER GAS



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Elme Messer Gaas, a subsidiary of the Messer Group, offers a wide range of gases in Estonia, including hydrogen. With production facilities located abroad and distribution points throughout Estonia, we ensure reliable and efficient supply to meet your needs. As the largest family-owned company in the industrial gas sector, the Messer Group is a recognized leader, operating in key markets across Europe, Asia, and America.

Future Prospect: The opportunity to supply clean hydrogen to industrial companies in Estonia. If possible, to bring a clean hydrogen production facility to Estonia.

Website



storage



distribution



PORT OF TALLINN



Hele-Mai Metsal, Head of Infrastructure Development Department
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Port of Tallinn is the biggest port authority in Estonia and its strategic goal is to develop the competitiveness of Estonia as a maritime country.

Port of Tallinn aims to establish Estonia as a key hub for green infrastructure in the Baltic Sea, supporting climate neutrality goals and enhancing competitiveness. The focus is on creating a renewable energy ecosystem in Muuga Harbor and Paldiski South Harbor which both are ice-free and well-suited for liquid and gaseous bulk cargo. In addition, Muuga Harbor's favourable location and its connection to the future Rail Baltica starting from Muuga harbour offers numerous business opportunities.

Future Prospect: Creating a renewable energy ecosystem including production, storing, bunkering, export and import of green hydrogen and its derivatives in Muuga Harbour and Paldiski South Harbor.

Website



storage



hydrogen production



distribution



Artur Dianov, Head of Sustainable Fuels at Alexela
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Alexela is a leading Estonian energy company offering a comprehensive range of energy products and services, including natural gas, liquid fuels, electricity, and advanced renewable energy solutions. Committed to sustainability, Alexela actively develops renewable projects, including solar parks for industrial sites, and supplies a range of fuels and consumer goods through its extensive retail network. Dedicated to driving Estonia's transition to cleaner energy, Alexela is set to play a key role in the emerging hydrogen value chain, prepared to supply hydrogen as demand increases.

Future Prospect: As one of Estonia's pioneers in hydrogen supply for the transport sector, Alexela offers comprehensive solutions across the entire hydrogen value chain, including derivatives like methanol and ammonia. Alexela services also extend to retail distribution through their network of gas stations and to industrial applications. Recently, Alexela introduced Estonia's first locally produced liquefied biomethane, available in the largest filling station chains across Estonia and accessible to market participants via the Hamina LNG terminal, serving both the Baltic and Finnish markets.

Website



storage



distribution

BALTIC OIL SERVICES



Lennart Alaverdi, Logistics Manager
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Baltic Oil Service, located in the Port of Paldiski, offers reliable liquid storage and handling solutions with 22 tanks providing a total capacity of 63 000 cubic meters. The facility boasts strategic accessibility to the port, railway, and major roadways, ensuring efficient logistics for your operations. With 2 port berths, 12 railway loading spots, and 2 vehicle loading points, we provide versatile solutions tailored to vast needs.

Future Prospect: Opportunities for future hydrogen storage and charging for transport vehicles.



storage

Website

ESTANC



Andres Kollo, Head of Sales
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Estanc is a prominent Estonian company, that specializes in manufacturing critical process equipment for various industries, including pulp and paper, petrochemicals, power, and marine sectors. Located in Rae vald, Harju County, Estanc has made significant strides in developing solutions for hydrogen production and carbon capture, positioning itself as a strategic partner in these evolving sectors. The company emphasizes high production standards and effective communication, catering to the specific needs of its global clientele. With a commitment to sustainability and innovation, Estanc continues to expand its capabilities, particularly in supporting the transition to green technologies and energy solutions.

Future Prospect: Opportunities for future hydrogen storage units.



storage

Website

LTH-BAAS



Veigo Tamra, Business Development Manager
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LTH-Baas is a company in the shipbuilding industry, specializing in the construction and renovation of vessels. The company focuses on complex technical modernization projects, outfitting new ships, and renovating and repairing existing vessels.

Future Prospect: The company is contributing to the hydrogen sector by aiming to develop an industrial, automated, and modular marine platform for hydrogen production, storage, and bunkering.



storage



distribution

Website

VARMATA



Ants Kippasto, Chairman of Supervisory Board
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Varmata is a company specializing in natural gas sales, network services, and the construction and maintenance of gas pipelines. Its main activities include natural gas sales, gas equipment inspections, pipeline installation, and maintenance.

Future Prospect: Development towards hydrogen technology-based services (network services, pipelines, and systems).



distribution

Website



GAZNET



Kristjan Relvik, CEO
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Gaznet Industrial offers various biogas, CNG and hydrogen storage and transportation solutions. We utilize mobile MEGC containers for filling solutions in addition to installing and maintaining gas appliances. Gaznet Industrial has helped implement Estonia's first hydrogen transport solutions.

Future Prospect: Hydrogen transport systems on land and hydrogen-powered vehicles and their gas systems.

Website



distribution

EG EHITUS



Martin Viilep, Construction director
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EG Ehitus is a leading designer and builder of gas pipelines, district heating systems, and water and sewage pipelines in Estonia. The company has successfully established several large pipeline networks for various purposes, including the installation of land pipelines for the Balticconnector project. With its expertise, EG Ehitus plays a vital role in enhancing the country's infrastructure and energy efficiency.

Future Prospect: Establish the first hydrogen pipelines and connections in Estonia to create a robust hydrogen infrastructure that supports cleaner energy solutions and enhances regional energy security.

Website



distribution

EESTI GAAS

eesti gaas

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Eesti Gaas is the largest privately-owned energy company in the Finland-Baltic region, operating in Estonia, Finland, and Poland under the name Elenger. Specializing in natural gas (LNG-based), its subsidiary Gaasivõrk manages Estonia's gas distribution network. Together with sister companies, Eesti Gaas offers tailored energy solutions, from pipeline design to complete heating systems and maintenance.

Future Prospect: There is an opportunity to establish comprehensive hydrogen networks, developing essential infrastructure, and implementing effective distribution systems to support the growing demand for clean energy solutions.



decarbonise heat & power



distribution

Website

GEORG FISCHER ABB

+GF+

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Georg Fischer, a Swiss company with an Estonian branch, specializes in pipes for liquid and gas transport, vehicle cast components, and precision manufacturing. It operates through three divisions: GF Piping Systems, GF Casting Solutions, and GF Machining Solutions, with GF Piping Systems having over 30 global branches.

Future Prospect: Infrastructure development in Estonia.



distribution

Website

NORDIC GAS SOLUTIONS



Meelis Kuusberg, General manager
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Nordic Gas specializes in designing and building high-quality facilities for the safe and environmentally friendly handling of natural gas and biogas. The company is focused on promoting the use of gas energy, particularly in the transportation sector. Their business model revolves around providing turnkey gas solutions, including fueling stations, storage facilities, and supporting equipment, covering both CNG and LNG gases. In January 2023, Nordic Gas Solutions became part of the TSG Group.

Future Prospect: Handling facilities in the hydrogen technology sector. Fuel stations and storage tanks for hydrogen fuels.



distribution

Website

KRISTEN GRUPP



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Kristen Grupp has been representative of Dover Fueling Solutions in Estonia for all most 30 years. In their portfolio is conventional and greener alternative fueling systems, windshield cleaning fluid dispensers from Eco Tank and hydrogen fueling solutions. The use of these dispensers and solutions promotes environmental sustainability. Kristen Grupp is committed to excellence and sustainability, making them a trusted partner for businesses looking to transition to greener practices.

Future Prospect: Aim for collaboration with retailers/suppliers to jointly establish hydrogen stations for vehicle refueling in the future.



distribution

Website

TERMINAL OIL



Jürgen Öigus, CEO
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Terminal has been operating since 1968, making it Estonia's oldest fuel provider. The company manages a storage terminal in Maardu with 24 tanks totaling 29,000 cubic meters and a liquid fuel terminal in Tartu with around 30 tanks, providing a capacity of 60,000 cubic meters. Their principal activities include the storage, wholesale trade and transportation of petroleum products, as well as retail sales of liquid fuels, autogas and electric vehicle charging at Terminal service stations across Estonia. Customers can find not only fuel but also delicious meals, unique coffee, car washes and convenience stores with a wide selection of products.

Future Prospect: Opportunities exist in the hydrogen sector, including the establishment of hydrogen refueling stations. Additionally, hydrogen storage solutions in fuel depots can be developed.

Website



ADVEN



Vladislav Mašatin, Head of Production & Distribution
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Adven's Estonian affiliate focuses on providing district heating and energy efficiency solutions. It develops and operates district heating systems using renewable energy sources, such as biomass and waste heat, while also optimizing energy consumption for residential and commercial clients. Adven has extensive expertise in processing services for the chemical industry, including hydrogen-based steam production and elemental sulfur combustion. Through innovative technologies, Adven aims to promote a greener energy landscape in Estonia.

Future Prospect: Adven is exploring opportunities to establish various hydrogen systems, utilizing them as heating stations to enhance sustainable energy solutions and reduce carbon emissions.



Website

energy system integration

VKG ELEKTRIVÕRGUD



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VKG Elektrivõrgud offers comprehensive design, development, construction, and maintenance services for electrical networks supporting Viru Keemia Group's energy production. With over 40 substations and extensive network infrastructure under our care, we ensure reliable performance and continued development, providing tailored solutions to meet your energy needs.

Future Prospect: Opportunities for establishing the necessary infrastructure and network systems for hydrogen technology.



Website

energy system integration

SCANDIC STREAM GROUP



Erik Laidvee, Charmain of the Board
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Scandic Stream Group specializes in maritime freight services connecting Asia and Scandinavia. They have established various shipping routes, including a recent freight line between Latvia and Sweden, enhancing regional logistics. Committed to customer service, they provide reliable and cost-effective shipping solutions tailored to client needs. Utilizing advanced technology and strategic partnerships, Scandic Stream Group ensures timely deliveries, contributing to seamless trade and growth between these dynamic regions.

Future Prospect: There is now a significant opportunity for hydrogen transportation.



Website

decarbonise mobility

TOYOTA BALTIC



Liisi Kõivumägi, Marketing communication & PR
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Toyota Baltics is a regional office responsible for Toyota's operations in the Baltic States, including Estonia, Latvia, and Lithuania. It oversees the distribution, sales, and after-sales service of Toyota vehicles, working with local dealerships to strengthen the brand's presence and ensure customer satisfaction. Toyota Baltics also emphasizes sustainable mobility solutions, including the promotion of hybrid and alternative fuel technologies, in alignment with Toyota's global commitment to reducing emissions and enhancing environmental sustainability.

Future Prospect: Toyota is dedicated to advancing hydrogen technology in their vehicle lineup, particularly with models like the Toyota Mirai, which is powered by green hydrogen fuel cells.



Website

decarbonise mobility



VOLVO ESTONIA



Mehis Madisson, Head of truck sales
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Volvo Estonia, a subsidiary of the Volvo Group, is responsible for managing the sale and representation of Volvo trucks in Estonia. The company oversees Volvo Truck operations and fulfills various related responsibilities. Globally, Volvo is already testing its first hydrogen-powered trucks on public roads, and clients from Estonia have visited Sweden to see the debut of Volvo's electric trucks.

Future Prospect: The company is looking into introducing hydrogen-powered trucks and establishing the necessary infrastructure in the Baltic region.



decarbonise mobility

Website

SEBE



Oliver Sassi, Commercial development specialist
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Sebe is an Estonian transport company that offers bus services and travel solutions. The company operates regional lines in Harju and Pärnu counties, as well as urban routes in Pärnu. Sebe focuses on passenger comfort and safety while providing a wide range of schedules and routes.

Future Prospect: The introduction of hydrogen fuel and hydrogen buses.



decarbonise mobility

Website

SCANIA ESTONIA



Anneli Jõela, Head of Estonian branch
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Scania's Estonian branch is responsible for the sale of Scania trucks and buses, as well as their spare parts, in Estonia. The company also operates in the military sector. Scania's global division is committed to innovation and climate neutrality, establishing a battery factory for trucks in Sweden and testing a range of innovative solutions, including hydrogen-powered trucks and buses.

Future Prospect: Hydrogen consumption opportunities in Estonia for large vehicles. Scania's Swedish operations have engaged in projects like HyTrucks to test fuel cell technologies in heavy transport, particularly focusing on hydrogen's potential as an energy storage solution.



Website

decarbonise mobility

HANSABUSS



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Hansabuss operates in the field of passenger buses and public transport services. The company offers a wide range of bus services, including long-distance routes, excursion trips, and city lines in Estonia, as well as international bus connections to other European countries.

Future Prospect: Opportunities to introduce hydrogen fuel cell-based buses.



Website

decarbonise mobility

GOBUS



Jüri Etverk, CEO
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GoBus is the largest provider of public bus services in Estonia, offering safe, comfortable, and high-quality transportation. Our fleet of 420 buses and 650 drivers operates across all Estonian counties and major cities, covering nearly 25 million kilometers each year. We also serve passengers on intercounty long-distance routes and provide charter services both domestically and internationally, making us a valued bus partner for individuals, businesses, and government agencies.

Future Prospect: GoBus is exploring the integration of hydrogen fuel cell-operated buses, aiming to enhance the sustainability of public transport by utilizing surplus hydrogen for fueling.



Website

decarbonise mobility

AUTOLINK



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Autolink is a leading logistics company based in Estonia, specializing in the transportation of finished vehicles across Eurasia. Operating from the Paldiski port terminal, Autolink offers vehicle storage and pre-delivery inspection (PDI) services. With a fleet of car-carrier trucks and railway wagons, they ensure efficient road and rail transport, providing seamless logistics solutions for manufacturers, importers, and dealers.

Future Prospect: Hydrogen consumption opportunities in Estonia for large vehicles.



Website

decarbonise mobility

AUVE TECH



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Auve Tech is a manufacturer of autonomous electric and hydrogen vehicles designed for first and last mile transport. These vehicles aim to enhance the speed and convenience of urban mobility. Auve Tech is among the few companies that have achieved Level 4 autonomy in self-driving vehicles. Since 2020, the company has been testing all its models on public streets in Estonia.

Future Prospect: Aim to incorporate hydrogen as a fuel source in its future Hydrogen model, expanding its commitment to sustainable autonomous transport.



Website

decarbonise mobility

XFLY



Jurgis Sedlenieks, CCO
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Xfly is a brand of the Estonian aviation company Regional Jet OÜ, which provides flight services to other aviation companies. Regional Jet OÜ is owned 51% by Nordic Aviation Group (Nordica) and 49% by LOT. Xfly offers a full flight service to other airlines, with its two main clients being SAS and LOT. The company has a larger base in Tallinn, where 7-8 aircraft are stationed.

Future Prospect: Opportunities for using hydrogen in air traffic or related operations.



Website

decarbonise mobility



SKYCORP TECHNOLOGIES



Marek Alliksoo, CEO
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SKYCORP Technologies is building the green autonomous ecosystem of drone-based services. Our long endurance hydrogen drones increase flight endurance to 120 minutes instead of 20-30 minutes with battery drones enabling lifesaving and productive eyes in the sky for first responders while replacing the need for expensive helicopters or hours of driving. Through our unique B2B Product as a Service model our hydrogen drones also enable aerial services such as inspecting critical infrastructure to produce more green energy while saving 90% of the inspection costs for service providers.

Future Prospect: SKYCORP Technologies is building towards the world's first sustainable and fully autonomous hydrogen drone network including ground infrastructure as micro-grids, capable of being scaled country- or Europe-wide.



Website

decarbonise mobility

DIAMOND SKY



Ken Koort, President & CEO
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Diamond Sky is EASA approved AOC and NCC operator providing aircraft management, charter, cargo and commercial flights. The company started operations back in 2013 and has commercially operated small piston engine airplanes and different business jets. We are striving to become the largest business jet operator in the Nordic area and expanding our operations scope continuously, with safety being the most important factor of them all. Our main location is Tallinn, Estonia, with an aviation network stretching from Europe to Southeast Asia.

Future Prospect: Our goal is to find ways to reduce the climate impact of our flying.



Website

decarbonise mobility

TS LAEVAD



Indrek Randveer, CEO
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TS Laevad, an Estonian ferry operator, provides essential transport services connecting the mainland to key islands like Saaremaa and Hiiumaa. As a subsidiary of the state-owned Port of Tallinn, TS Laevad operates a fleet designed to handle both passenger and cargo transport, supporting the mobility and economic development of island communities. The company plays a critical role in Estonia's transport infrastructure, offering year-round connectivity that boosts tourism and strengthens regional ties.

Future Prospect: Aim to advance green maritime initiatives by designing its newest ferry with electric propulsion and potential for hydrogen integration, keeping future fuel options open as technology evolves.



Website

decarbonise mobility

BALTIC WORKBOATS



Margus Vanaselja, CEO
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Baltic Workboats specializes in shipbuilding and marine technology, known for producing high-quality, customizable small vessels, industrial platforms, rapid response boats, and other marine crafts. The company is committed to sustainability and innovation, incorporating hybrid and electric solutions into its designs. Internationally recognized for delivering tailored marine solutions to meet diverse client needs, Baltic Workboats serves a global clientele.

Future Prospect: Hydrogen to be used both as an input in the shipbuilding process and as fuel for marine vessels.



Website

decarbonise mobility

HHLA TK ESTONIA



Riia Sillave, CEO
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HHLA TK Estonia is a part of Hamburger Hafen und Logistik AG (HHLA), a leading European logistics company specializing in port operations and logistics solutions. Based in Muuga, Estonia's largest cargo port, HHLA TK Estonia offers advanced terminal services, handling a wide range of cargo from containers to bulk goods. The company is strategically focused on enhancing logistics networks between Europe, the Baltics, and the CIS, and is committed to sustainable growth, implementing innovative technology to streamline operations and improve efficiency.

Future Prospect: With its experience in hydrogen projects at its Hamburg operations, including fuel cell technologies for container transport, HHLA TK Estonia could adopt similar technologies to enhance hydrogen supply chains in Estonia. Collaborations with other Baltic and Northern European hydrogen initiatives could also position HHLA TK Estonia to facilitate hydrogen imports and exports, strengthening Estonia's role in the green energy transition.

Website



decarbonise mobility

SRC



Alex Vainokivi, Innovation manager
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SRC Group is a leading provider of ship conversion and retrofit solutions. As an innovation-driven company, SRC actively explores advancements in hydrogen and its derivatives, including methanol. SRC's Methanol Superstorage (MSS) offers a volume-efficient and safe approach to methanol storage on board, positioning SRC at the forefront of the sustainable energy transition in shipping.

Future Prospect: Advancing the integration of hydrogen and its derivatives within the maritime sector to support the industry in reaching environmental targets.



Website

decarbonise mobility

OPERAIL



Merle Kurvits, Member of the Board
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Operail is an Estonian state-owned railway company that transports goods and maintains rolling stock while also building locomotives. Operating on both domestic and international rail networks, Operail handles a variety of products, including chemicals, fertilizers, and food items, primarily serving logistics and manufacturing companies. Their cargo transportation extends to Europe (with the Mediterranean as the endpoint) and Asia (ending in the South China Sea).

Future Prospect: Having recently undergone privatization by the Estonian government, there is now a significant opportunity for hydrogen transportation.



Website

decarbonise mobility

DERIVAAT NH3



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Derivaat NH3 specializes in ammonia-based (NH3) solutions for clean energy and industrial applications. The company focuses on harnessing ammonia as an efficient hydrogen carrier and carbon-free fuel, positioning itself as a key player in the transition to sustainable energy systems. By innovating around NH3 storage, production, and usage, Derivaat NH3 aims to offer scalable solutions for industries seeking cleaner, low-carbon alternatives.

Future Prospect: Aim to support large-scale hydrogen storage and transportation solutions, facilitating its use across sectors where hydrogen infrastructure may not yet be developed.



Website

decarbonise industry feedstock

TALLINN AIRPORT



Riivo Tuvike, CEO
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Tallinn Airport is the largest in Estonia and serves as the primary hub for domestic and international flights. It features five taxiways and 14 terminal gates. Beyond its flight operations, the airport offers aircraft maintenance, parking services, and hosts several aviation-related manufacturing companies on its grounds.

Future Prospect: Due to hydrogen or its derivatives' potential as a future fuel, it is necessary to develop the appropriate infrastructure at the airport to facilitate the use of hydrogen as a new aviation fuel. Tallinn Airport aims to increase the passenger terminal's capacity to 8 million travelers annually by 2035, with a projected actual passenger count of 6 million per year by that time.



Website

decarbonise industry feedstock

BALTIC HYDROGEN GROUP



Valentin Bratkov, Director of Business Development, Estonia
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Baltic Hydrogen Group (BHG) is a renewable energy infrastructure company that is establishing a comprehensive green hydrogen ecosystem across Estonia, Latvia, and Lithuania. The company is dedicated to producing 100% green hydrogen utilizing renewable sources such as wind and solar power. BHG aims to address essential needs in industrial decarbonization, transportation, and energy storage, positioning hydrogen as a crucial component of the future energy landscape. The company focuses on sustainable production, distribution, and promotion of hydrogen as an environmentally friendly energy carrier while creating long-term partnerships and agreements with local stakeholders in the Baltic region.

By leveraging our expertise and real track records in construction of hydrogen projects and our relationships with private and government entities, BHG aims to be the principal partner for those seeking to further the generation and application of hydrogen.

Our mission is to nurture the development of a new Hydrogen Economy in Europe by developing innovative projects in the Baltics, including implementation of local and EU and EU made technologies.

Future Prospect: Aim to establish a clean hydrogen production projects alongside renewable energy generation and create a foundation for a value chain based on it.

Website



decarbonise industry feedstock



ELERING

elering

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Elering is Estonia's independent electricity and gas system operator, ensuring a reliable energy supply for consumers. Regulated by the Electricity Market Act and the Natural Gas Act, Elering manages the balance between production and consumption in the electricity system while maintaining adequate gas supply for consumers.

Future Prospect: Integrate hydrogen into the existing energy supply system to diversify and enhance energy sources. Additionally, develop the necessary infrastructure to support hydrogen production, storage, and distribution, ensuring a seamless transition to a more sustainable energy future.



decarbonise heat & power



distribution

Website

ELEKTRILEVI



Mihkel Härm, CEO
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Elektrilevi is the largest distribution network operator in Estonia, covering 95% of Estonia with the power grid. Elektrilevi has more than 533,000 electricity network services customers. To ensure electricity supply, we maintain and upgrade 63,000 kilometres of power lines and 25,300 substations throughout Estonia.

Future Prospect: Hydrogen is set to play a pivotal role in future Baltic renewable projects, as technology matures and integrates into regional energy systems.



decarbonise heat & power

Website

METROSERT



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AS Metrosert is Estonia's central metrology organization, dedicated to developing and maintaining measurement standards, certifying and calibrating measuring instruments, and assessing the conformity of products and management systems. Additionally, the Metrosert Applied Research Center (i.e. RUK) supports innovation and development in five key fields: health data, autonomous vehicles, biorefining, drone technologies, and hydrogen technologies. The organization also determines and labels precious metal products.

Future Prospect: Aim of the RUK's hydrogen technology unit is to contribute to the creation and maintenance of a hydrogen technology ecosystem, thereby supporting companies operating in Estonia in creating internationally competitive services, products, and technologies from idea to industrial prototype.

Website



ESTONIAN AVIATION ACADEMY



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The Estonian Aviation Academy (EAVA) is a national applied university specializing in training aviation professionals for the Estonian industry. Its practical curriculum, modern facilities, and adherence to high local and international standards make it a unique institution, with education delivered by experienced specialists from aviation companies and universities.

Future Prospect: EAVA collaborates with European aviation and education partners on research and industry advancements, which aligns with broader trends of sustainable aviation fuel (SAF) exploration in Europe. While hydrogen-focused programs may not yet be prominent at EAVA, they are likely to increase as the global aviation industry moves towards sustainable alternatives.

Website



R&D

TTK UNIVERSITY OF APPLIED SCIENCE



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TTK University of Applied Sciences (TTK UAS) is the largest university of applied sciences in Estonia, currently serving around 3,000 students. It offers professional higher education and applied research in fields such as technology, production, civil engineering, logistics, economics, and welfare. The Institute of Technology and Circular Economy at TTK UAS is dedicated to research in green technologies, including hydrogen. The university collaborates with various companies, providing essential research and development services to foster innovation in real-world applications.

Future Prospect: Various development and research activities related to hydrogen technology, in collaboration with companies in the hydrogen value chain sectors.

Website



R&D

TALTECH



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TalTech is the largest technical university in the Baltic region, with around 10,000 students from over 100 countries. It plays a key role in hydrogen technology development, highlighted by the establishment of the TiVo (TalTech Institute of Engineering's Hydrogen Organization) in 2022. This initiative fosters collaboration among students interested in hydrogen and supports research in the field. TalTech is also linked to several prominent companies in hydrogen technologies, including Auve Tech, and collaborates with Stargate Hydrogen.

Future Prospect: Pursue opportunities for collaboration in the field of hydrogen technology taking place at both the business and research levels, both in Estonia and internationally.



Website

TARTU VOCATIONAL COLLEGE



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Tartu Vocational College is Estonia's premier institution for vocational education, offering programs across eight fields (Information Technology, Culinary Arts, Technology (Engineering), Business, Construction, Beauty Therapy, Tourism, and In-Service Training) to prepare students for practical careers. The college places a strong emphasis on hands-on learning and international studies, ensuring that students gain valuable skills applicable in a global context. This approach helps equip students for success in various industries, enhancing their employability both locally and abroad.

Future Prospect: The college plans to develop a hydrogen technology curriculum with EU funding, focusing on identifying the necessary skills for hydrogen technologists in Estonia and Europe. Based on this, tailored educational programs will be created.



Website



UNIVERSITY OF TARTU



Enn Lust, Chair of the Physical Chemistry department
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The University of Tartu is Estonia's oldest and most prestigious university, renowned for its globally respected research. Known for its broad academic reach, the university invests significantly in future technologies, including hydrogen technology research. It has established the Hydrogen and Renewable Energy Studies Center (VTEK) within its Institute of Chemistry. The university has also initiated research collaborations with several Estonian hydrogen technology companies, such as Auve Tech and H2Electro.

Future Prospect: Aim to strengthen its role in hydrogen technology through targeted R&D investments, collaborative efforts with high-potential hydrogen tech companies, and expanded international research opportunities in renewable energy.



Website

HYDROGEN VALLEY ESTONIA: "FROM ZERO TO GREEN"



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Hydrogen Valley Estonia (HVE), the world's first nationwide hydrogen valley, is a national PPP initiative aimed at accelerating Estonia's energy transition and independence through hydrogen innovation. Uniting major regions, industry leaders, and academic institutions, HVE is building a sustainable hydrogen ecosystem to support Estonia's clean energy ambitions.

Future Prospect: HVE aims to be Estonia's primary hydrogen economy, policy and collaboration partner, expanding its network and welcoming additional partners to solidify its role in both national and international hydrogen initiatives. HVE aims to facilitate the nationwide hydrogen sandbox to accelerate the transition towards energy security.



Website

ESTONIAN ASSOCIATION OF HYDROGEN TECHNOLOGIES



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The Estonian Association of Hydrogen technologies is an educational organization dedicated to building knowledge and understanding of hydrogen technologies in Estonia. By organizing workshops, seminars, and collaborative events, the association helps industry professionals, educators, and the public learn about the potential of hydrogen as a clean energy source. Focused on fostering innovation and skill development, the Association works to position Estonia as a forward-thinking player in the global hydrogen economy, aligning its efforts with broader EU energy and climate goals.

Future Prospect: Association aims to drive Estonia's shift to a hydrogen-based energy economy by fostering education, research, and cross-sector partnerships.



Website

ESTONIAN HYDROGEN ASSOCIATION



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The Estonian Hydrogen Cluster drives innovation in hydrogen technology by connecting businesses, researchers, and government entities to build a more sustainable energy future. Through its efforts, the cluster gathers and shares critical information on hydrogen production and application, raises public awareness, and unites the public and private sectors, academia, and society. It also fosters international connections, helping Estonian hydrogen solutions integrate into European and global value chains and strengthening the national innovation ecosystem.

Future Prospect: Association aims to drive Estonia's shift to a hydrogen-based energy economy by fostering development of the hydrogen infrastructure.



Website

estonian investment agency

The Estonian Investment Agency, a part of Enterprise Estonia, is a government agency promoting foreign investments in Estonia and assisting international companies in finding business opportunities in Estonia.

We offer comprehensive, one-stop investment consultancy services, free of charge, which are always tailored to meet potential and existing investors' precise needs. Our mission is to help foreign investors grow their businesses and improve their competitiveness.

Our services:

- information services and investment preparation
- investment proposals and visits
- consulting and project management
- facilitating contacts, negotiation with authorities
- organising recruitment and identifying suitable properties
- post-investment / aftercare services

Top Investment Agency 2018-2020 by Site Selection Magazine
2020 – 2023 Invest Estonia has come out in top in Emerging Europe's annual investment promotion report.

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