

Elering's Strategy

2026–2035



Elering's Vision 2035:

An Estonia where energy creates a sense of security, lasting well-being and new opportunities

Elering's strategy to 2035 describes the path toward building a reliable, interconnected, and future-proof energy system for Estonia. A changing climate, geopolitical instability, and rapid technological development bring both new expectations and risks.

Elering's mission:



**We keep the lights on
and homes warm in Estonia in every situation**

To implement Elering's mission and vision, there are four strategic objectives:



Security of
electricity and gas
supply



Energy security



Competitiveness of
energy prices



Top-tier customer
experience

Key Actions Through 2035

- ✓ We invest in crisis preparedness and strengthen our recovery capability.
- ✓ We organise tenders for new dispatchable power plants.
- ✓ We develop the energy system based on a competitive final price.
- ✓ We proactively develop the electricity grid to enable faster connection of new power plants.
- ✓ We make investment decisions regarding new cross-border connections.

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01 | Elering's Mission, Vision and Values

Elering's Mission:

**We keep the lights
on and homes warm
in Estonia in every
situation**

Elering's priority is the well-being of Estonian energy consumers

Security of supply must be ensured in all circumstances

Elering ensures the security of electricity and gas supply for both household and large consumers

Elering's Vision:

An Estonia where energy creates a sense of security, lasting well-being and new opportunities

Elering's vision describes the future we help shape – an Estonia where energy-related decisions, infrastructure, and systems create value for people, businesses, and society as a whole.

SECURITY

- Security reflects the ability of people and businesses to rely on uninterrupted, reliable, and secure energy supply – both daily and in times of crisis.
- Estonia's energy system is protected, transparently managed, and built with a long-term perspective.
- Security is the foundation of societal stability, supporting both citizens and investors.

LASTING WELL-BEING

- Energy is the foundation of lasting well-being and a secure future.
- Well-being means reasonable energy prices, quality of life, a cleaner environment, and reliable services.
- “Lasting” highlights that Elering helps build an energy system that supports long-term balance between reasonable prices, economic development, and a clean environment.

NEW OPPORTUNITIES

- A forward-looking Estonia is flexible, innovative, and open to change.
- Elering creates the conditions for Estonia's energy system to act as a driver of change by advancing innovation, new technologies and business models and promoting cross-border cooperation.

Elering's Values:

Responsibility, commitment and openness

Elering's values are reflected in responsibility toward society, commitment to customers, and openness to change.

RESPONSIBILITY

- We recognise our **responsibility to society** to ensure electricity and gas supply in an economically efficient manner.
- A well-functioning energy market with **equal treatment of market participants** is the best way to ensure security of supply.
- We value **every employee's contribution**, which helps fulfil our commitments to society at a high standard.

COMMITMENT

- All of Elering's **services have a client**. We are committed to **creating value for our clients** and for our clients' customers.
- We create value for clients by combining our people's **long-term experience and the latest knowledge**.
- We offer the **best solutions** in the energy sector.

OPENNESS

- Today's energy system is changing rapidly. We are **open to change and adaptable**.
- We **create new opportunities and support innovation** in the energy sector.
- **Readiness for change** begins with our people. To lead change, we value each person's **initiative, courage, and desire to grow**.

02 | Elering's Strategic Objectives



Elering's strategic focus is on security of supply, energy security, energy prices, and customer experience

KEY FACTORS INFLUENCING ELERING



Society's dependence on electricity supply is growing. This results in higher expectations for security of supply



The geopolitical situation and growing protectionism require focused attention on energy security to ensure the energy system operates even in crisis situations



Energy prices have become a significant issue in the international competitive environment, directly affecting national economies



New technologies offer extensive opportunities to make work more efficient and improve the customer experience



STAKEHOLDERS

Customers



Direct customers – producers, large consumers, network operators, balance providers, sellers, energy brokers, statistical traders

End consumer



Businesses and household consumers who use electricity, natural gas, or renewable fuels every day

Partners



Both local partners (subcontractors, service providers) and international partners – other transmission system operators and system operators

Employees



Elering's greatest asset – its employees

Owner



The owner – the state – sets the framework of expectations that Elering must fulfil

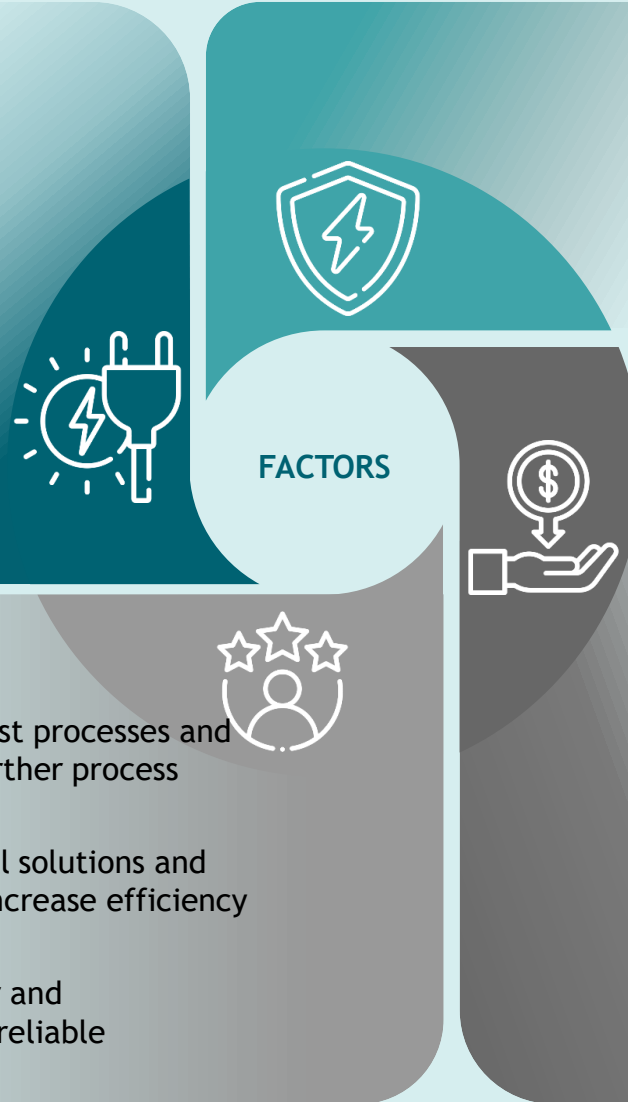
External influencing factors create expectations for Estonia's energy system and set the tone for Elering's strategic objectives

Security of supply

- **Impact of electrification** – society's dependence on electricity supply is increasing. This results in higher expectations for security of supply. Electrification of transport and heating increases consumption
- The need for **controllable power plants** – to complement renewable energy, the system requires controllable plants that can provide reserves to maintain balance
- **The role of gas and renewable gases** – long-term electricity security of supply requires access to natural gas, as well as readiness to replace natural gas with renewable gases

Customer experience

- **Automation and quality** – rising expectations for fast processes and access to data require new data architecture and further process automation to ensure high service quality
- **Digital solutions and AI** – the development of digital solutions and artificial intelligence creates new opportunities to increase efficiency and customer value
- **Communication and trust** – customers expect clear and understandable communication and see Elering as a reliable competence centre







Energy security

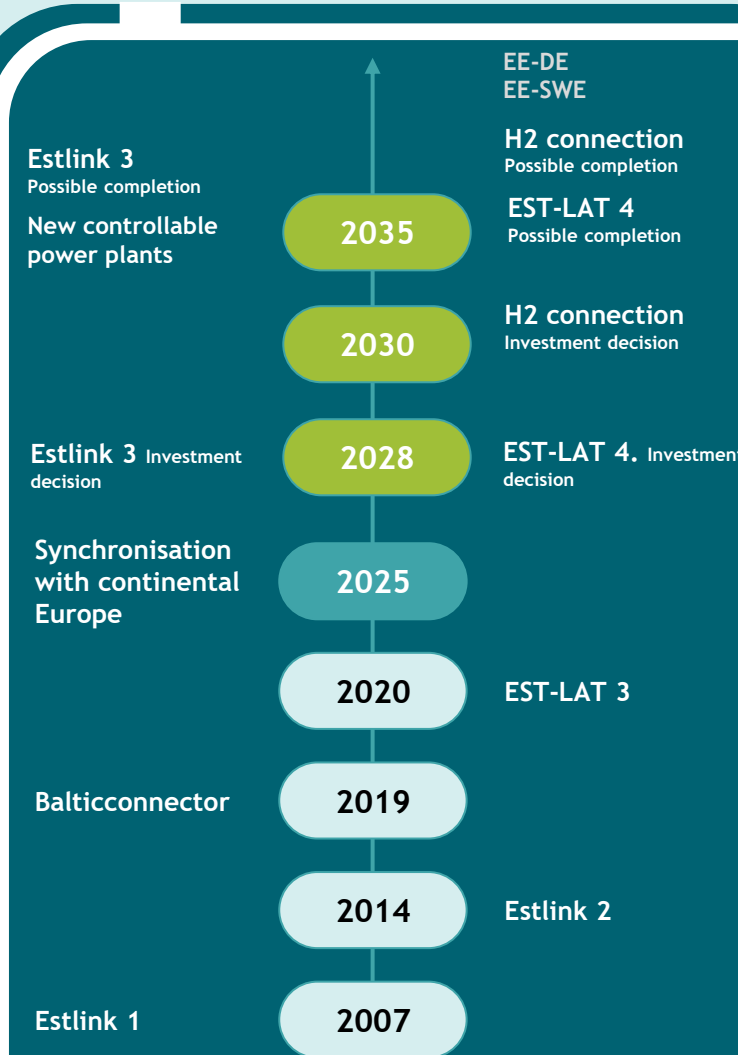
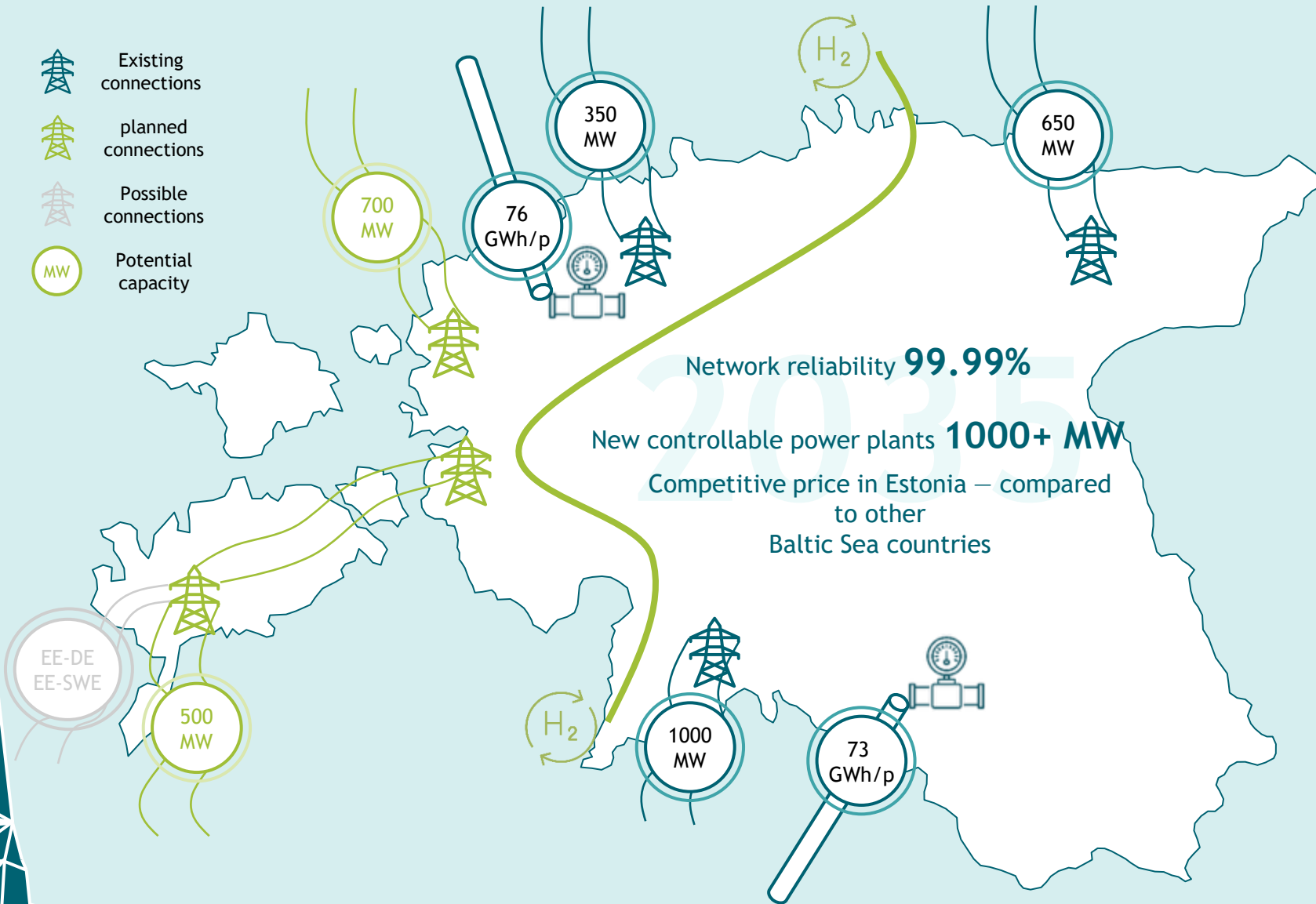
- **Focus on energy independence** – sustainability is shaped by geopolitical security, where energy independence and resilience have become central objectives
- **Autonomous operability** – the energy system must be able to operate even under conditions of limited cross-border connections when necessary
- **Regional connections** – deeper international connections and cooperation reduce dependence on third countries and strengthen local energy security

Competitive price

- **Balance between investments and prices** – investments ensuring security of supply and energy security must support a price level that remains competitive compared to other countries
- **Impact of renewable energy** – the growing share of renewables reduces the electricity price component in the final price
- **European market integration** – stronger integration with European markets increases international trading and helps lower the final energy price

Domestic power plants, network reliability, improved crisis resilience, and strong regional connections ensure good security of supply, sufficient energy security, and competitive prices

-  Existing connections
-  Planned connections
-  Possible connections
-  Potential capacity



Subtargets for achieving strategic objectives



Security of electricity and gas supply

Elering ensures the security of electricity and gas supply in a changing environment through the most environmentally friendly local generation and sufficient connections.

- Reliable electricity transmission network
- Reliable gas transmission network
- Balanced electricity system
- Dynamic system stability – frequency, voltage, power flows
- Sufficient generation capacity and international transmission capacity
- Extending the lifetime of the gas network to 2050



Energy security

Elering enhances Estonia's energy security by improving system resilience and ensuring the energy supply for essential services during crises.

- Electricity system's rapid recovery capability
- Protection of physical infrastructure and cybersecurity
- Ensuring domestic generation capacity in crises
- Integration of the energy system with Europe
- The necessary gas supply is ensured for electricity system operation
- Ensuring system management capability in non-standard situations



Competitiveness of energy prices

Elering is the guiding force of Estonia's energy system, offering long-term system vision and impact analyses to ensure the highest possible competitiveness of Estonia's energy prices.

- Analysis of future scenarios for security of supply in Estonia's energy system and a decision-making process based on the final price
- Development of the transmission grid alongside distribution networks
- Cost-effective system balancing
- Market transparency and continuous information exchange



Top-tier customer experience

Elering's services and solutions are based on customer needs. This ensures a competitive energy market, security of supply, and good energy prices for end consumers.

- Network service customer satisfaction
- Connection service customer satisfaction
- Balance service customer satisfaction
- Renewable energy support customer satisfaction
- End consumer satisfaction



Thank you!