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Submission to the COP30 Presidency Roadmaps

From dialogue to delivery: private sector pathways from the real economy

This submission is provided in response to the COP30 Presidency invitation to contribute to the roadmaps on (i) transitioning away from fossil fuels in a just, orderly and equitable manner and (ii) halting and reversing deforestation and forest degradation by 2030.

It draws on insights generated during panels at EY House at COP30, bringing together actors across public policy, finance and the real economy. Throughout the discussions, a consistent signal has emerged: the constraint is no longer ambition but the structuring of delivery systems capable of translating climate ambition into implementation in the real economy.

Discussions spanning energy, agroindustry, infrastructure, mining and financial services point to a common challenge: while climate ambition continues to advance, implementation capacity remains uneven.

In this context, this submission aims to contribute a private sector perspective on how policy signals are translated into investment decisions, operational change and scalable outcomes.

It is aligned with the outcome of the first Global Stocktake under the Paris Agreement (Decision 1/CMA.5), which calls for accelerated action across all sectors, including transitioning away from fossil fuels in energy systems and halting and reversing deforestation and forest degradation, while recognizing the important role of non-Party stakeholders, particularly the private sector, in scaling implementation and supporting delivery.

EY House at COP30

The EY House was established as a platform for dialogue and solution-oriented exchange, focused on advancing the implementation of the climate agenda. It brought together representatives from the private sector, public institutions and civil society to explore practical pathways for sustainable development.

Over the course of COP30, the EY House convened a broad and diverse group of stakeholders, with more than 3 thousand participants engaging across approximately 90 sessions. It brought together high-level representation from both public and private sectors, including ministers, governors and other public authorities, alongside over 100



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CEOs and more than 200 companies from 33 countries, including over 30 publicly listed companies in Brazil, indigenous leaders. This level of participation underscores the breadth and diversity of perspectives informing the discussions and reinforces the relevance of the insights reflected in this submission.

I. Transitioning away from fossil fuels: an implementation lens

(a) Key barriers

Insights from EY House highlight a set of interconnected constraints:

- Infrastructure lock-in across transport, industry and energy systems
- A persistent gap between available capital and bankable projects
- Fragmented regulatory environments, limiting predictability
- Cost and scalability constraints in hard to abate sectors
- Territorial and socioeconomic complexity, requiring differentiated pathways

These factors continue to affect the translation of climate ambition into investable and executable pipelines.

On the occasion of COP30, EY conducted the Impact Edge study for an in-depth analysis of the value that Environmental, Social, Governance (ESG) practices bring to infrastructure-related sectors, including construction, transport, logistics, sanitation and energy, to support clients, partners and organizations in advancing a more efficient and strategic agenda. Our analysis indicates that the consistent adoption of ESG practices could drive sector growth of up to 5.6%, generating approximately R\$34 billion annually for the national economy. These findings provide concrete evidence that ESG is increasingly being recognized as a value driver for the country's development.

(b) Enabling factors and levers

Progress appears to be strongest where alignment is achieved across markets, policy and execution:

- Demand for low-carbon products, including mechanisms that provide greater certainty for the investment
- Stable and credible regulatory frameworks to guide long-term capital allocation
- Sectoral pathways, including modal shifts in transport systems, the expansion of biofuels, and electrification pathways; circular economy approaches and the substitution of energy sources in industrial processes; grid modernization, energy storage and the integration of renewable energy systems
- Leveraging existing low-carbon assets, particularly renewable energy systems



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- Blended finance and risk-sharing mechanisms to address the gap between available capital and bankable projects

In line with the objectives of the Mitigation Work Programme (Decision 4/CMA.4 and 13/CMA.5), these elements underscore the importance of scalable, sector-based solutions grounded in the real economy.

(c) Lessons learned

Experience across sectors suggest that implementation is more effective when:

- Addressed at the level of value chains rather than individual sectors
- Supported by coordination between infrastructure, finance and policy domains
- Enabled by data systems that ensure transparency and traceability

Many of these elements are already in place. The remaining challenge lies in scaling and replication.

(d) Just, orderly and equitable transition

A just transition, as reflected in discussions, is closely linked to:

- Recognition of differentiated national and regional circumstances
- Integration of land use, natural capital and industrial systems
- Alignment with development, inclusion and workforce dynamics

In this respect, the transition extends beyond energy systems and reflects broader structural transformations across economies and territories.

II. Halting and reversing deforestation: aligning incentives with outcomes

(a) Key barriers

Key constraints identified include:

- Land tenure insecurity and governance gaps
- Persistent illegal deforestation and enforcement limitations
- Economic incentives favoring land conversion
- Limited traceability in supply chains
- Unequal access to technology and finance
- Increasing climate pressures on ecosystems



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These dynamics continue to limit the alignment between forest conservation and economic incentives on a scale.

Our Impact Edge study indicates that in the agribusiness sector indicate that the ESG practices could drive the sector growth of up to 26.5%, generating approximately R\$247 billion in the national economy, providing concrete evidence that sustainability is increasingly shifting from a perceived cost to a driver of value.

(b) Enabling factors and levers

A number of enabling conditions are already emerging:

- Traceability and monitoring systems using geospatial data and satellite-based technologies
- Integrated production systems that increase productivity without expansion
- Bioeconomy models that generate value from standing forests through value-added production systems
- Financial mechanisms, including carbon markets and related instruments to support conservation and restoration
- Market and trade incentives linked to sustainability performance

Where these elements are combined, conservation tends to be sustained within economically viable and scalable models.

(c) Lessons learned

Experience across sectors indicates that:

- Productivity gains can reduce pressure for land expansion
- Traceability strengthens both compliance and market access
- Local economic models are critical for long-term forest protection

(d) Reflecting diverse realities

Effective forest strategies must:

- Recognize indigenous peoples and local communities as central actors
- Reflect territorial diversity
- Integrate environmental, economic and social dimensions

This points toward more integrated territorial development approaches, where conservation and production are addressed jointly.



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Emerging convergence between climate and biodiversity agendas

Discussions at EY House also highlighted an emerging, but still evolving, convergence between the climate and biodiversity agendas. Forests, land-use systems and bioeconomy value chains are increasingly positioned not only as mitigation and adaptation solutions, but as critical components of broader nature-positive development pathways

This convergence remains in an early stage of structuring. Advancing will require greater alignment between climate and biodiversity policy frameworks, the development of integrated metrics and monitoring systems, and financial models capable of valuing ecosystem services alongside carbon outcomes.

From a real economy perspective, the opportunity lies in moving from parallel agendas to integrated investment and production systems, where climate and nature objectives are addressed simultaneously through scalable, market-aligned solutions.

III. Contribution to UNFCCC processes and private sector engagement

The insights generated through EY House directly respond to COP decisions that call for accelerated implementation following the first Global Stocktake and encourage stronger engagement of non-Party stakeholders, including the private sector, in delivering climate action.

They are also aligned with ongoing discussions under the Mitigation Work Programme, particularly the need to scale practical, sector-based mitigation solutions and the UAE Framework for the Global Goal on Adaptation, including the integration of resilience into infrastructure, energy and urban systems.

From a private sector perspective, a key contribution lies in translating policy signals into investment pipelines, connecting financial systems with operational realities, and scaling solutions across interconnected value chains.

IV. Conclusion

Discussions at the EY House during COP30 point to a consistent finding: while climate ambition continues to advance, implementation is increasingly emerging as the central challenge. Progress under both roadmaps will depend, inter alia, on the capacity to translate policy signals into bankable opportunities, to better align capital, regulatory frameworks and sectoral strategies, and to support the scaling of solutions across value chains and territories.



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In this context, Latin America offers a relevant perspective where a number of these dynamics are already being tested. Moving forward, efforts may therefore benefit from focusing less on the identification of new solutions, and more on enabling the scaling of existing approaches, with enhanced coordination, credibility and timeliness.

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