

# **Promoting the Dialogue with EUROCÂMARAS to Enhance the Interests of the European Businesses in Brazil**

**Jun 2023**

**Project Name:** Promoting the Dialogue with EUROCÂMARAS to Enhance the Interests of the European Industry in Brazil

**Beneficiaries:** Delegation of the European Union to Brazil ("DELBRA"), the EU Member-states, EUROCÂMARAS, and European bilateral chambers of trade and commerce

**Report Title:** Final Study

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Implemented by:



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## A. Glossary

### 1. Abbreviations

<b>CNAE</b>	National Classification of Economic Activities	<b>IE</b>	Incidental Expenditures
<b>DELBRA</b>	The Delegation of the European Union to Brazil	<b>ISIC</b>	United Nations Economic and Social Affairs (UNESA)'s Industry Classification (ISIC)
<b>DG</b>	Directorate-General	<b>KE</b>	Key Experts
<b>DU</b>	National Directorate of the initiative	<b>LGPD</b>	Brazilian General Personal Data Protection Law
<b>ECSS</b>	European Classification of Size Standards	<b>SME</b>	Small and Medium-Sized Enterprises
<b>EU</b>	European Union	<b>ToR</b>	Terms of Reference
<b>IBGE</b>	The Brazilian Institute of Geography and Statistics	<b>WG</b>	Key thematic Working Groups to structure the dialogue among DELBRA, Eurocâmaras, the Bilateral Chambers' their members, and key stakeholders in Brazil on key policy priorities for the EU-Brazil economic relationship.

### 2. Glossary and Definitions

<b>Survey</b>	An online survey designed and implemented amongst representatives of the EU industry in Brazil to identify the main areas of interest of the EU industry that relate to the EU priorities within the framework of its economic relationship with Brazil, as transcribed in Annex B below.
<b>Bilateral Chambers</b>	The European Member States' Bilateral Chambers of Trade and Commerce located all over the Brazilian territory.
<b>Eurocâmaras</b>	The representation of Eurochambers in Brazil.
<b>Action</b>	DELBRA's Action named "Promoting the dialogue with Eurocâmaras to enhance the interests of the European industry in Brazil."
<b>Beneficiaries</b>	The EU Delegation to Brazil ("DELBRA"), the EU Member States, EUROCÂMARAS, and European bilateral chambers of trade and commerce.

## B. Executive Summary

Concerning the European Union Delegation of the European Union to Brazil ("DELBRA")'s Action named "Promoting the dialogue with EUROCÂMARAS to enhance the interests of the European industry in Brazil" (referred to from now on as the "Action"), all the deliverables were accomplished within the timeframe and effectively. This Action's main direct Beneficiaries include DELBRA, the EU Member States, Eurochambers in Brazil (also known as "Eurocâmaras"), and the European bilateral chambers of trade and commerce (from now on, simply referred to as the "Bilateral Chambers").

The overall objective of this Action was to promote EU trade and economic priorities in Brazil by enhancing the dialogue with Eurocâmaras. To achieve this, two specific goals were determined:

- Promote the establishment of key thematic Working Groups (the "WGs") to structure the dialogue between DELBRA, Eurocâmaras, and the European industry's representatives in Brazil on key policy priorities for the EU-Brazil economic relationship.
- Improve the relationship among DELBRA, the EU Member States, and Eurocâmaras to identify and implement strategic measures of interest for the EU and the European companies in Brazil.

Four activities have been foreseen and undertaken to accomplish these goals and related tasks, oriented under Team Europe's approach:



**Output 1:** Firstly, a **Survey** (the "Survey") was designed and implemented amongst representatives of the EU industry in Brazil to identify its main areas of interest that relate to the EU priorities within the framework of its economic relationship with Brazil, which outcomes are detailed in this report (the "Report"). The overview of the **European**

**industry presence in Brazil** was also assessed among the Survey Respondents, including sectors, employment, leverage of investment, and other relevant qualifiers.

The Respondents' origins were from EU Member-States which represent 85% of the overall trade with Brazil, and 62% of representatives held high-rank positions in their organisations. Although with a slight prevalence of engineering, technical services and related segments, the responses covered representatives of 35 different segments of the economy proposed in the form, with one single exception, "media and entertainment". Respondents also indicated all levels of employment, company sizes, types, and levels of investment, although the majority was below the € 3 million threshold, and most was expansion as opposed to green-field ventures. Finally, although most companies operate out of São Paulo, the Survey got contributions from Respondents with businesses in all the Brazilian regions, and close to half have a truly national presence.

**Output 2:** Secondly, based on the Survey findings, a proposal was defined to gather the **main thematic areas of interest** of the European industry in Brazil that relate to the EU's focal priorities within the framework of its economic relationship with Brazil, grouped as follows:

#### MAIN THEMATIC AREAS OF INTEREST



i) International Trade, Foreign Investment, and Economic Policies



ii) Enabling Business Environment



iii) Digital Economy

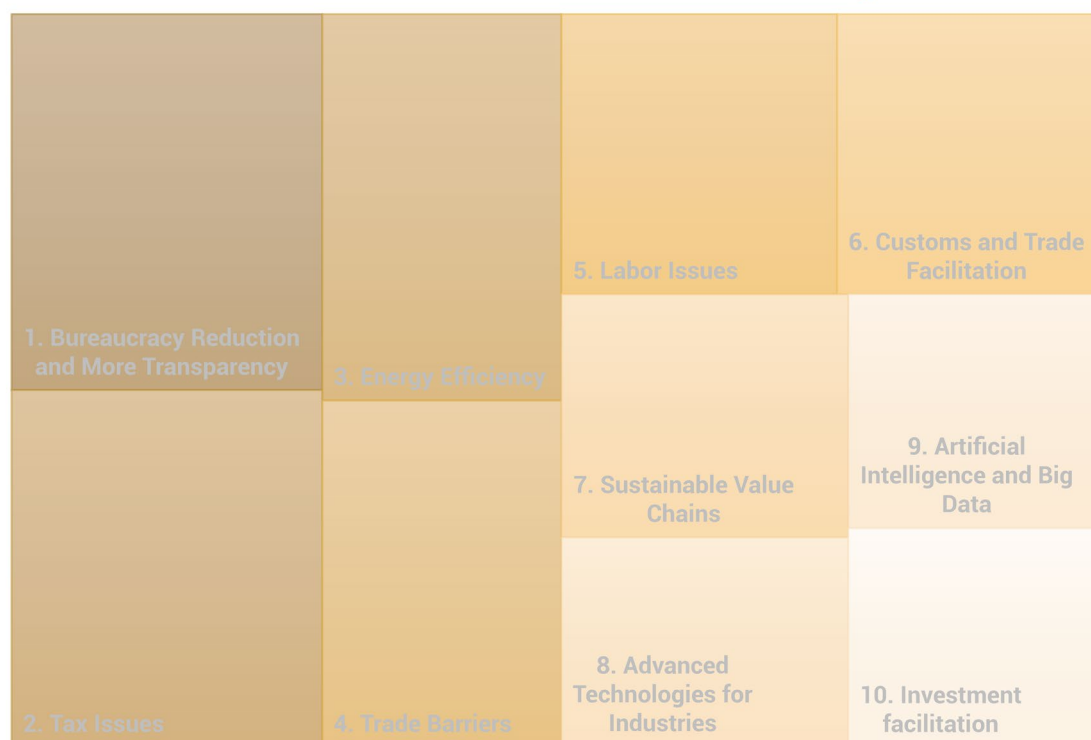


iv) Climate, Environment, and Sustainability

Specifically, within the thematic areas of interest mentioned above, the Respondents pondered what would increase their presence in the country through investment opportunities and enhanced trade flow.

The Respondents' main concerns, i.e., the aspects that could most impact the companies' operations in Brazil (referred to from now on as "**Priority Topics**"), are comprised of trade barriers and customs facilitation, disruptive levels of bureaucracy, tax issues, artificial intelligence and big data, energy efficiency, among others, as indicated below and further detailed in this Report:

### RESPONDENTS' 10 TOP PRIORITY TOPICS | 2023



**Output 3:** *Thirdly*, in the context of this specific initiative and considering the importance of shared objectives among Europeans, the involvement of Bilateral Chambers and their members under the Eurocâmaras's structure can be highly significant, and this involvement should be designed to be effective.

The following analysis takes into account various aspects where Eurocâmaras can provide complementary services rather than competing with Bilateral Chambers, according to the Respondents. The objective is to enhance and broaden the resources available to European businesses in order to promote their success in the country, rather than creating rivalry.

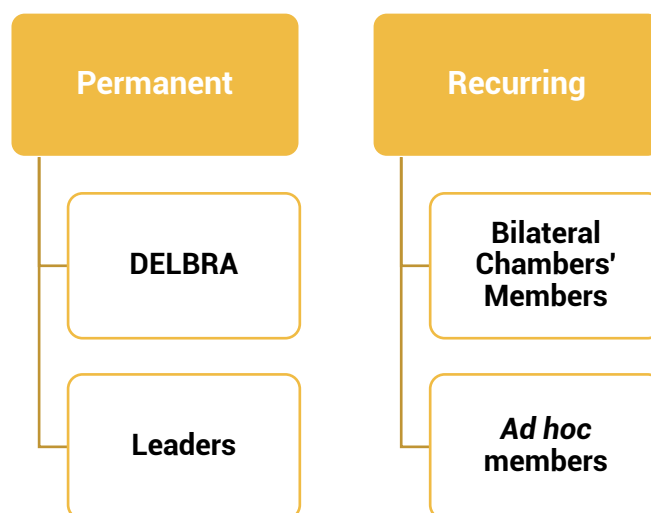


There are many ambitious expectations among the Bilateral Chambers' members in regard to a reinforced Eurocâmaras in Brazil, as explained in this Report. The top four services they call for under the Eurocâmaras are:



Therefore, based on the information collected in the Survey and additional interviews with selected Respondents (the "Interviews"), this Report includes a proposal for the structure, configuration, and functioning procedures of the WGs to be composed by DELBRA, members of the Bilateral Chambers, representatives of the European industry and *ad hoc* relevant stakeholders who could make the discussions more relevant and fruitful:

#### WG COMPOSITION



These three contemplated WGs, as presented to the Beneficiaries, are to be established within the structure of Eurocâmaras to address the above-mentioned Beneficiaries' Priority Topics and other potentially required interventions within the said Main Thematic Areas of Interest.

Implementing a Working Group structure will allow Eurocâmaras to incorporate members of the Bilateral Chambers into its decision-making strategy as active leaders in policy prioritization. Representing diverse industries from Europe in Brazil will require a blend of insight from various sources. A forum wherein all members can provide input and participate in debate will allow decisions to be made in a manner that reflects a thorough collaboration between all bodies.

Having this in mind, the Respondents indicated that the proposed thematic WGs should be an effective tool for enhancing dialogue and cooperation between the EU and Brazil. In other words, if implemented successfully, the groups should ultimately contribute to the increase of trade and investment flows, as they will foster a continuous and constructive exchange of ideas amongst DELBRA, Eurocâmaras, and the European industry's representatives upon visualising and tackling with the necessary and available tools the hurdles of the private sector in its attempt to prosper in Brazil as they appear.

To ensure operative governance in the WGs and support Eurocâmaras' mission of promoting trade and investment between Brazil and Europe, key practices include establishing clear mandates, inviting diverse membership, fostering open communication channels, employing transparent decision-making processes, and maintaining regular communication with stakeholders. By adopting these practices, the WGs can make meaningful contributions to the European business community in Brazil and eventually facilitate the development of successful trade policies and regulations that reflect the needs of the said stakeholders.

For the next implementation phase, the proposed timeline for the first year of implementing the WGs is summarised as follows:

- **Months 1-2:** The Eurocâmaras will call for members of Bilateral Chambers to join the WGs through various communication channels.
- **Months 3-4:** WG leaders will be selected from the members of Bilateral Chambers, and their names and biographies will be shared. The first meeting will be held to discuss goals, deliverables, and strategies, and the WGs will establish their agendas.
- **Month 5:** An open webinar will be organized to promote the WGs' activities and engage with the business community.
- **Month 6:** The second meeting will take place to discuss the WGs' first position papers, which will summarize their objectives, issues, proposed solutions, and recommendations.

- **Months 7-8:** Closed events will be organized with a relevant government stakeholder, where the WGs will present their position papers and explore collaboration opportunities.
- **Months 9-12:** Meetings will be held to plan activities for the second year, evaluate progress, and set new goals. The WGs' leaders will submit a final yearly report to DELBRA, highlighting achievements, lessons learned, and recommendations.

As a result of these efforts, three deliverables were produced: 1) a Survey/report on the **identification of European industries in Brazil** and data on presence, relevance, and scope; 2) information on strategic main thematic priority areas and the respective **Priority Topics** for the European industry in Brazil, and 3) a presentation of a proposal on the structure, composition, and functioning procedures of four thematic **Working Groups** to be established within the institutional setup of Eurocâmaras.

## C. Introduction

### 1. Background

In recent years, the EU has collaborated closely with Brazil to strengthen economic ties and promote trade and investment flows. The partnership between the European Union and Brazil has been growing strategically since 2007 and spans across all political areas. As one of its most influential economic and investment partners worldwide, Brazil is the largest exporter of agricultural and food products to the European Union, while the EU is Brazil's second-largest trading partner.

Likewise, investment plays a crucial role in the economic relationship between the two economies. According to data from Eurostat, the European Union is one of the largest foreign investors in Brazil, with a net investment value of over € 263 billion between 2000 and 2020,<sup>1</sup> representing nearly half of Brazil's foreign investment stock.

Through these investments in various sectors, the EU has helped establish a robust private sector presence in Brazil, particularly in fields such as digital, telecommunications, energy, health, and infrastructure, which are vital for sustainable and prosperous growth. The European industry has contributed to the country's economic development for centuries; their financial, intellectual, and technological contributions have become ever so crucial in the last decades.

The pressing urgency to create stronger communication channels between DELBRA and the EU businesses in Brazil, compatible with this growing relationship, has proven to be undeniable. It is only logical then to benefit from the existing structure of a local organisation that already represents the European community's shared interests, making it as instrumental, relevant, and resourceful as possible.

### 2. Purpose and Scope of the Report

Initially, it was necessary to prepare a general overview of the EU industry's presence, relevance, and exposures in Brazil through a screening and further investigation to identify their main thematic areas of interest that relate to the EU priorities in the context of its economic relationship with Brazil, and then establish their Priority Topics.

Therefore, this Report translates the outcomes of a Survey conducted by DELBRA in collaboration with the bilateral European Chambers of Commerce (the "Survey"), followed by individual interviews. With responses from European companies located in different parts of Brazil, from several segments, in an illustrative but representative

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<sup>1</sup> "EU direct investment positions, flows and income, by countries (BPM6). Last access in June 2023 at <https://ec.europa.eu/eurostat/databrowser/bookmark/d50ca779-2972-46da-9bb9-ea2e9da123c1?lang=en>

portion of the European chambers' foreign members,<sup>2</sup> it provides a consolidated overview of the Respondents' data, including numbers relating to their recent investment behaviour, local employment, presence and reach, priorities, and sensitivities. Among the Respondents, the KEs also identified the Priority Topics, i.e., what matters, if resolved, would enable an even broader and deeper relationship with an economy with such potentialities and with a growing consumer market as Brazil.

As anticipated, it was also clear from the Survey that both sides could benefit from the Eurocâmaras as a suitable avenue to consolidate the common issues, allowing DELBRA to make the necessary interventions. Strengthening Eurocâmaras is a viable and effective route. The purpose of this proposed revitalised Eurocâmaras would serve as a supplement to, rather than a competitor to, the Bilateral Chambers, with the intention of providing European businesses with an upgraded and extended set of mechanisms that will enable them to thrive in the nation.

Following this assessment, the structuring of thematic working groups within Eurocâmaras has shown to be a practical and efficient tool to structure the dialogue among DELBRA, Eurocâmaras and the European industry's representatives in Brazil on those priorities for the EU-Brazil economic relationship. This Report also provides pragmatic recommendations on how to benefit the most from such efforts, as well as helpful materials to be easily adjusted and put into use.

### **3. Report's Structure**

This report comprises 11 sections, designed to provide insights into the European industry in Brazil upon the analysis of the Respondents' contributions, as well as a discussion on how to implement WGs to increase the dialogue with the European business community in the country. The material is structured as follows:

The report starts with a Glossary section that provides definitions of key terms and abbreviations used throughout the document.

The Executive Summary, located in section B, offers a concise overview of the Report's main findings and conclusions.

The Introduction in section C provides background information on the purpose and scope of the Report and outlines the Report's structure.

Section D provides detailed information on the Survey conducted as part of the report, including the methodological approaches used, the plan employed for the Survey, the Survey's structure, limitations, engagement strategies, parameters and representation, and data analysis.

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<sup>2</sup> Please refer to the Methodology in the next section.

Section E provides information on the Respondents' profile, including their nationalities, representatives, segments, priorities, level of investment, and workforce. The section also includes information on the location of the Respondents' businesses.

Section F presents the Survey findings on the main thematic areas of interest of the Respondents.

Sections G and H are dedicated to the Bilateral Chambers and Eurocâmaras, respectively. Section H discusses European businesses' expectations concerning Eurocâmaras, the purpose and objectives of the WGs, the methodology of the WG's formation, composition, identification of key stakeholders, implementation, and evaluation.

Section I provides further detailed information on Eurocâmaras's WGs, including their purpose and objectives, the methodology of their formation, composition, identification of key stakeholders, implementation, evaluation, examples of successful Eurochambers' structures, governance, decision-making processes, the leaders' roles, leadership rotation, rules, and procedures for meetings and communication, workstreams, identification of resources required, implementation, and evaluation.

Section J presents the final remarks and recommendations based on the Survey findings and the services to be provided by Eurocâmaras. The report's last section, K, provides a bibliography and other sources used in the Report.

This Report also contains useful materials for this Action's coming implementation. Annex A provides details on the Survey methodology, while Annex B includes the Survey transcript. Annex C provides information on the Bilateral Chambers' committees, official websites and services; and, lastly, Annex D contains the calling for the WG's Leaders.

# The Survey

## D. The Survey

### 1. Methodological Notes

The Key Experts (the “KEs”) were initially mandated to identify the main areas of interest of European businesses in Brazil that relate to the EU priorities within the framework of its economic relationship with Brazil, as well as of Eurocâmaras’ and the Bilateral Chambers’ (collectively referred to from now on as the “Beneficiaries”).

To achieve this goal, the KEs utilised a targeted approach through an online Survey that aimed to capture the perspectives of a broad spectrum of companies operating in Brazil, diverse in their businesses, sizes, segments, and presence on Brazilian soil.

By having a large group of companies portraying their perceptions of Brazilian challenges and opportunities, the KEs tried to grasp diverse interests and perceptions so as to allow them to provide meaningful insights into the priorities and concerns of European companies operating in Brazil, to eventually be used to advise on the structure of the Eurocâmaras’s WGs.

The Beneficiaries’ support and engagement were decisive for the accomplishment of this first activity, which would not have been successful otherwise.

### 2. Survey Parameters and Representation

- **Sample size:** Although the KEs do not have access to the exact number of companies in the Bilateral Chambers’ mailing lists, the number of foreign members among the Bilateral Chambers would be close to 800, disregarding duplications<sup>3</sup>.

There were 106 unique and valid responses to the Survey. Representing approximately 13.25% of the total companies, the mass of Respondents is technically appropriate to characterise the group. The attempt was to have a sufficiently large sample size to provide a representative picture of the European businesses in Brazil. Therefore, the sample size that the KEs obtained reflected the statistical power analysis and was proportional to the group size.

- **Validity and reliability:** To ensure the validity of the Survey, appropriate measures and methods were used, including a clear definition of the research objectives, a well-designed questionnaire, and a representative sample of the target population. The Survey was conducted consistently and systematically,

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<sup>3</sup> Duplications can occur because of companies who are members of multiple Bilateral Chambers, as observed many times among the Respondents.



ensuring that all participants were asked the same questions in the same order, and the data collected were analysed using appropriate statistical techniques.

Regarding reliability, the Survey and supplemental interviews were conducted by the KEs, trained professionals who followed the same procedures and guidelines to avoid any bias or inconsistencies. Additionally, the Survey was pretested to identify and correct any potential errors, ambiguity or misunderstandings in the questions.

As a result, the research has high validity and reliability, meaning that the results accurately and consistently reflect the expected EU businesses' priorities in Brazil. Furthermore, the data analysis reinforced logical explanations about the areas of interest and, as expected, helped validate the most critical topics that could impact the European companies' operations in the country.

- **Data collection and analysis:** In addition to the topics that most affected the Respondents' businesses in Brazil, the questions also attempted to capture the most relevant features of the European Respondents' investment in Brazil, such as the sectors, locations in the country, employment, and any potential investment in the past five years.

To ensure that the Survey results were accurate and representative, one effective method was to evaluate each response and its ratio within the total number of responses to determine the weight of each answer. This method considered the importance of each response relative to the overall sample, ensuring that the findings were neutral and reflective of the profile of the European business community in Brazil.

A deeper analysis of the data to identify trends and patterns in European investment in Brazil would have been beneficial, should time had allowed. This could involve using regression analysis to determine the factors that most influence European companies' decisions to invest in Brazil in the first place, such as the political climate, economic stability, existing and potential market sizes, and regulatory environment.

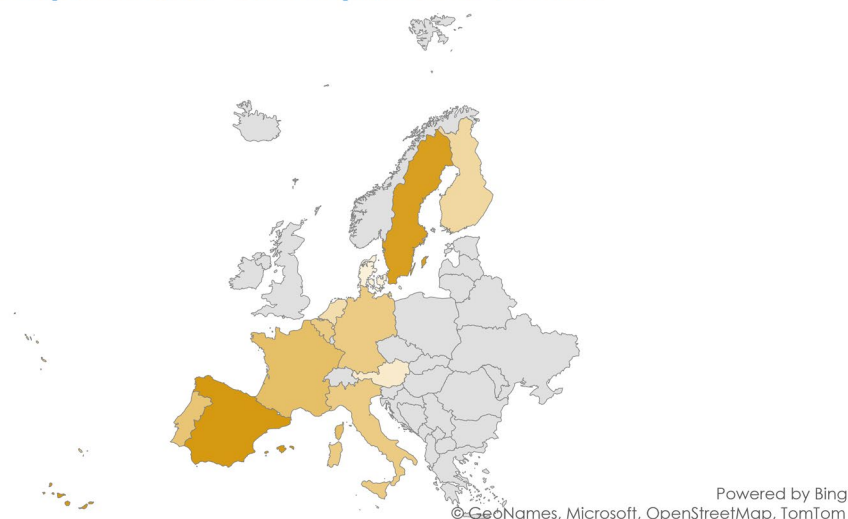
Additional methodological details about the applied Survey may be found in Annex A, while the Survey itself was transcribed in Annex B below.

## E. The Respondents' Profile and Findings

The data from the Survey provides valuable insights into the trade environment in the country. As mentioned, the figures indicate that the Survey managed to capture a diverse range of European companies operating in Brazil, from SMEs to large multinational corporations, with most EU nationalities being accounted for in the Sampled group. The representation of Respondents across different regions also highlights the multiplicity of experiences and perspectives.

### 1. Respondents' Nationalities

#### Respondents' Headquarters | 2023

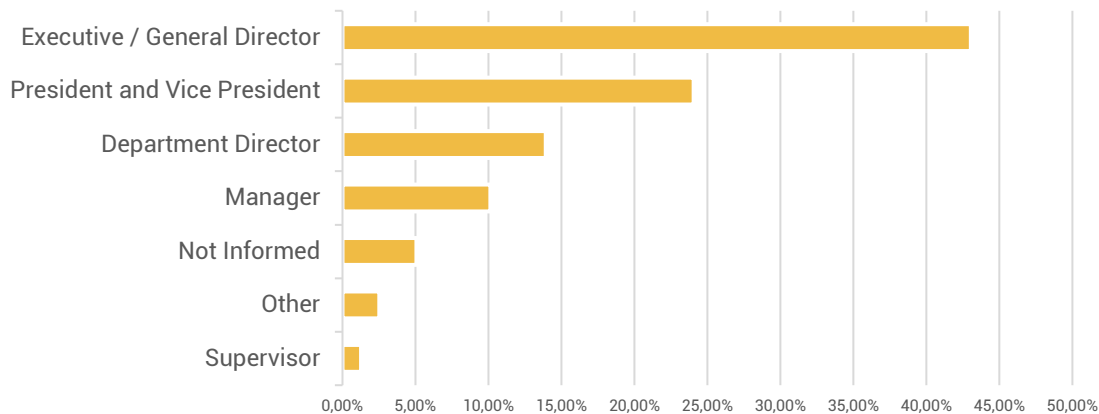


Concerning the **nationalities** participating in the Survey, this Report examined responses from companies originating or with headquarters in most European Union economies that trade with Brazil, accounting for approximately 85% of the trade in goods and services between the two regions.<sup>4</sup> These economies include Austria, Belgium, Denmark, France, Finland, Germany, Greece, Italy, Malta, the Netherlands, Portugal, Spain, and Sweden.

<sup>4</sup> To ensure the validity of the sample size, the KEs examined the available data on bilateral trade flows between the EU and Brazil. According to the European Commission's Directorate-General for Trade; the countries mentioned in the Report collectively represented approximately 86% of the EU's exports to Brazil and 84% of the EU's imports from Brazil in 2022.

## 2. Positions of Respondents' Representatives

### Positions of Respondents' Representatives



The Survey results reveal that, with the support of the Beneficiaries, the KEs managed to get the attention of the EU businesses' C-level<sup>5</sup>: a substantial majority, amounting to 62% of the Respondents, are in high-ranking positions within their respective companies in Brazil, including roles such as president, vice president, or general director.

As key decision-makers in the country, they are likely to possess a significant level of authority, knowledge, and a deep understanding of their organisation's operations, goals, priorities, policies, decision-making processes, and challenges, which, therefore, offered valuable insights into the Survey inquiries as their input is significant and reflective of the views and practices of the companies they represent. This finding confirms once again the credibility and reliability of the Survey results and interviews presented and commented in the coming Sessions, as well as the recommendations deriving thereto.

## 3. Comments on the Respondents' Segments

The Respondents represent a diverse range of European businesses operating in Brazil. Engineering and technical services (ISIC 71) is the largest group of respondents, with 20 companies. Suggesting the mounting importance of these industries in Brazil's economy, the engineering sector was followed by the manufacturing of machinery and equipment (ISIC 36), the food and beverage industry (ISIC 10), and energy and utilities (ISIC 35), with 13 companies each. Finally, the automotive industry (ISIC 29) had 12 respondents. This is not surprising given that Brazil is one of the world's largest automotive markets and that European car manufacturers have a strong presence in the country.

<sup>5</sup> The term "C-level" is a common vernacular that is used to describe the top tiers of a corporation's senior executives and managers.

## Respondents' Segments | 2023



Other sectors with a significant number of Respondents include business services (ISIC 74) and information and communication technology (ISIC 58), with 10 companies each, followed by agriculture, forestry, and fishing (ISIC 01), with 8 companies.

The Survey results, although limited, match with the majority of the Bilateral Chambers' members and suggest that European businesses operating in Brazil are primarily focused on engineering and technical services and industries related to manufacturing and energy production.

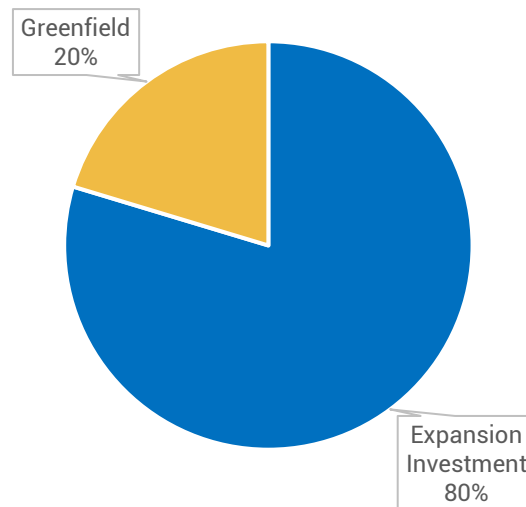
The Survey also reveals a relatively small number of Respondents in sectors such as sanitation (ISIC 9000), legal services (ISIC 69), luxury retail (ISIC 4771), public relations and communication (ISIC 73)<sup>6</sup>, and tourism and hospitality (ISIC 55).

#### 4. Respondents' Level of Investment in the Past Five Years

##### 4.1. Investments' Modalities

The pursuit of new opportunities and expansion abroad is a common goal in the business world. For European companies, Brazil has been a destination of choice for investment, with a remarkable 69% of surveyed companies having made investments in the country in the past five years.

#### Respondents' Investment Modalities 2018 - 2023



The types of investments made by the Respondents varied, but a majority of investors, i.e., 80%, focused on expansion investments. These were investments made by companies to increase the capacity of their operations in Brazil. This included upgrading their equipment, improving their workforce, or developing new products or services.

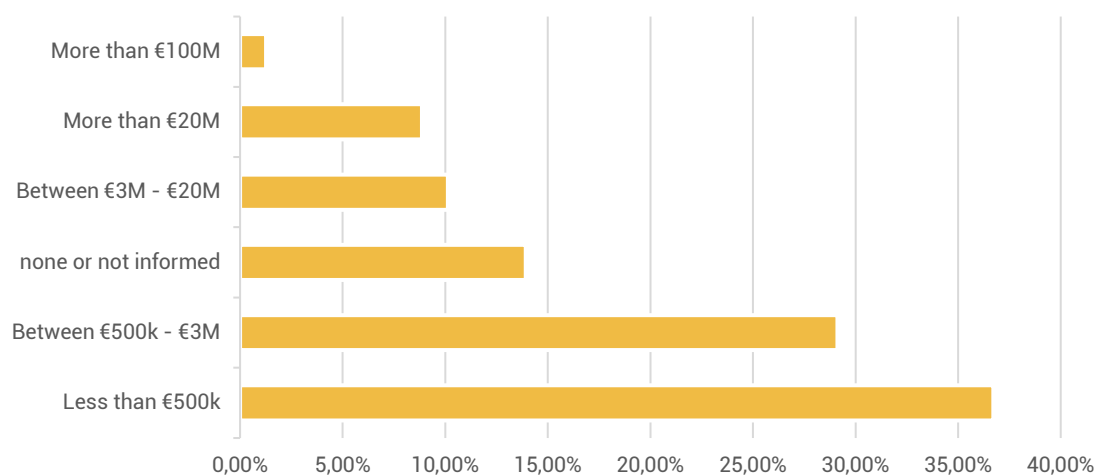
<sup>6</sup> Specifically regarding the segment of 'public relations and communication', one Respondent volunteered that the fewer responses were linked to a language and/or cultural barrier impeding a more robust presence of European countries in these segments.

On the other hand, the remaining 20% of investors responding to the Survey chose to make greenfield investments. These are investments companies make to establish new operations in a foreign country, either by building new facilities or developing new infrastructure. This type of investment typically involves a higher level of risk and uncertainty, but it can also offer significant rewards if successful.

The Respondents' numbers and their growing activities confirm their narrative that Brazil is still an attractive destination for European businesses looking to invest and expand their operations for a wide range of various businesses across various sectors.

## 4.2. Investments' Magnitude

### Respondents' Investments in Brazil | 2018-2023

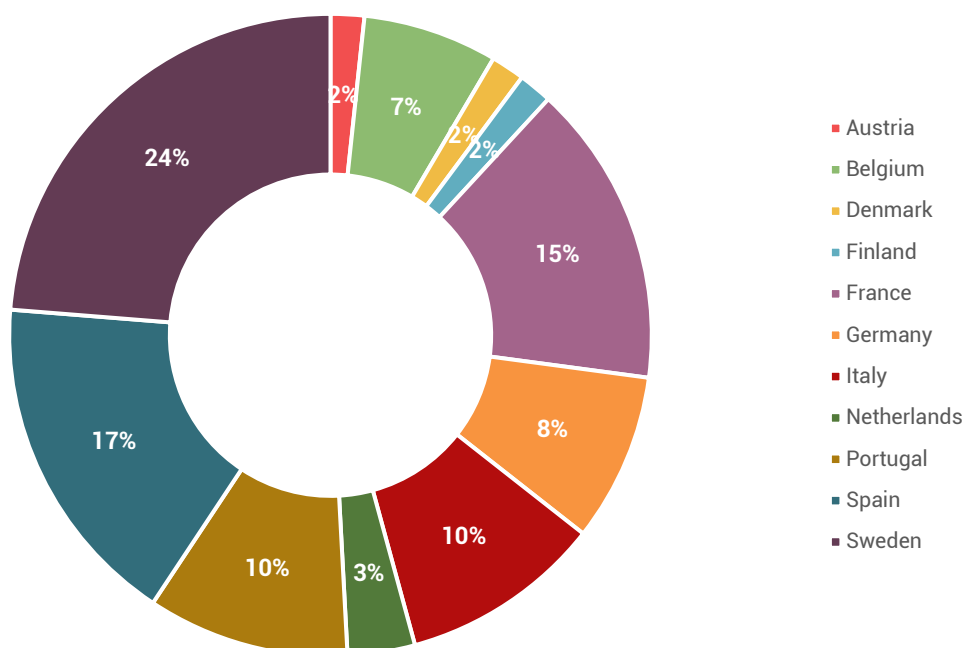


Note that 63% of the Respondents have invested up to € 3 million in the country in the past five years. While it is essential to conduct further analysis to better understand the investment patterns of these European businesses in Brazil, Respondents reported in their individual interviews that their European headquarters were cautious in their approach towards investing in Brazil due to perceived economic and political risks associated with the country's recent economic and political climate. Others implied that European businesses were more focused on smaller-scale investments that aligned with their strategic goals in Brazil.

While Respondents also indicate that there may be room for more investment in Brazil by European businesses, it is crucial to recognise the current investment patterns as a sign of thoughtful and well-planned investment strategies. With a continued focus on strategic and sustainable investments in Brazil, even if in a smaller scale, European businesses can continue to play an essential role in driving economic growth and development in the country.

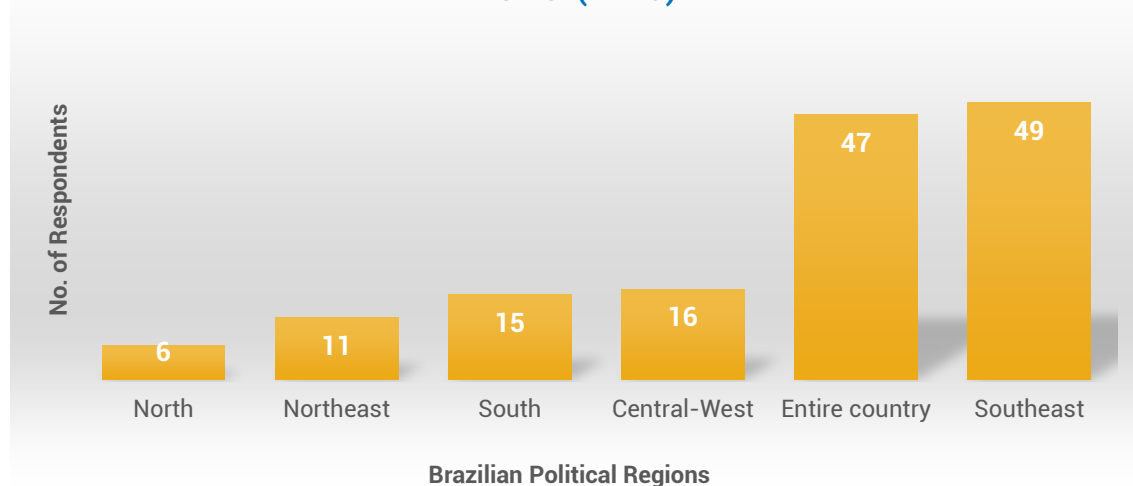
Another analysis that one could draw from the Survey is the origin of said Respondents' investments per EU Member State, as follows in this self-explanatory illustration:

### Investments in Brazil per EU Member State 2018-2023



## 5. Respondents' Presence in Brazil

### Presence of EU Businesses' Operations in Brazil 2023 (in %)





Concerning the Respondents' distribution across the country's regions, the Survey results show, as expected, that the **Southeast region**<sup>7</sup> has the highest percentage of Respondents, with 49% of the total sample. This outcome is not surprising since the Southeast region is Brazil's most populated and economically developed region, contributing to 55% of the country's GDP and accounting for 43% of the total population.

On the other hand, the **"Entire Country"** category, meaning the Respondents who operate in all Brazilian political regions, has the second highest percentage of Respondents, with 47% of the total sample.

The **Central-West region**<sup>8</sup> has the third-highest percentage of Respondents, with 16% of the total sample. This region is responsible for 8% of Brazil's GDP and represents 8% of the total population. The **South region**<sup>9</sup> has the fourth-highest percentage of Respondents, with 15% of the total sample. This region contributes to 16% of Brazil's GDP and accounts for 14% of the total population. The **Northeast region**<sup>10</sup> has the fifth-highest percentage of Respondents, with 11% of the full sample. This region is responsible for 13% of Brazil's GDP and represents 27% of the total population.

Lastly, the **North region**<sup>11</sup> has the lowest percentage of Respondents, with only 6% of the full sample. This region contributes to 3% of Brazil's GDP and accounts for 8% of the total population.

## 6. Respondents' Workforce

According to IBGE categories, the Respondents classified themselves based on the most commonly used groupings for the size of a company in Brazil, which are microenterprises (ME), SMEs, and large companies.<sup>12</sup> The Respondents in the Survey were distributed as follows:

<sup>7</sup> The Southeast region includes the States of São Paulo, Minas Gerais, Espírito Santo and Rio de Janeiro.

<sup>8</sup> The Central-West consists of the states of Goiás, Mato Grosso, and Mato Grosso do Sul, as well as the Federal District, in which Brasília is located.

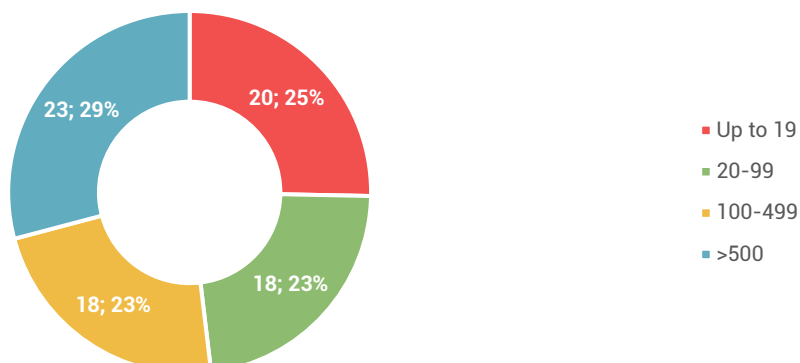
<sup>9</sup> The South includes the states of Paraná, Santa Catarina, and Rio Grande do Sul.

<sup>10</sup> The North region contains the states of Maranhão, Piauí, Ceará, Rio Grande do Norte, Paraíba, Alagoas, Sergipe, Bahia, and Pernambuco.

<sup>11</sup> The Northeast region comprises the states of Acre, Rondônia, Amazonas, Pará, Tocantins, Roraima, and Amapá.

<sup>12</sup> In Brazil, Microenterprises have up to 19 employees. SMEs have between 20 and 499 employees, which were further divided into "small" and "medium". Large companies have over 500 employees.

## Respondents' Workforce in Brazil | 2023



It is interesting to note, though, that most Respondents (74,47%) were from small to medium-sized enterprises, with less than 500 employees.

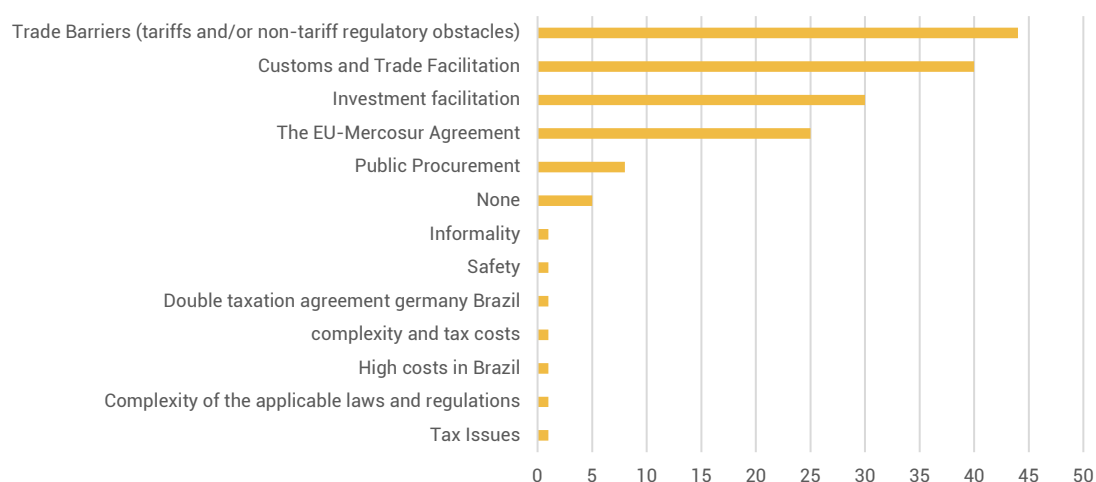
## F. The Respondents' Priority Topics

This section provides the aspects that could most impact the companies' operations in Brazil as an indication of the most critical challenges and opportunities faced by European companies operating in Brazil, as reported by the Respondents, especially detailing the Respondents' Priority Topics.

### 1. International Trade, Foreign Investment, and Economic Policies

According to the results of the Survey, a significant portion of the Respondents have identified several areas of concern related to International Trade, Foreign Investment, and Economic Policies, which Priority Topics are described and individually commented below:

#### INTERNATIONAL TRADE: Priority Topics | 2023



In particular, most of the Respondents indicated that '**trade barriers**' was the most critical issue that has impacted their operations, and this number of votes represents approximately 53% of the total Respondents. The barriers cited by the Respondents include tariffs and non-tariff regulatory obstacles, which restrict or impede their flow of goods and services between the EU and Brazil.

Additionally, 49,1% of the total identified '**customs and trade facilitation**' as a significant issue affecting their operations, as they result in delays and increased transaction costs, ultimately reducing competitiveness. Customs procedures were reported to be particularly detrimental for SMEs, which typically lack the resources to navigate complex regulations. Streamlining customs procedures and improving trade facilitation could help reduce costs and increase the efficiency of said enterprises.

Other notable areas of concern for the European companies included '[investment facilitation](#),' which was identified by 39% of the Respondents. According to them, this topic would require measures to modernise the process of investing in Brazil and provide greater legal certainty and protection for investors.

Subsequently, the '[EU-Mercosur Agreement](#)' was identified by 29,2% of the Respondents. Unsurprisingly, some of the interviewed individuals indicated frustration and low expectation levels. The Survey results suggested that some companies have significant concerns about the agreement's implementation, and a few, very low expectations.

The agreement, in theory, aimed to reduce trade barriers and promote economic cooperation between the EU and Mercosur countries, including Brazil. However, there are concerns raised by some of the European businesses, now in Brazil, regarding the potential impact of the agreement on issues like environmental protection and human rights. These concerns stem from the possibility of such matters being converted into trade barriers in practice.

'[Government procurement](#)' was identified as a relevant issue by only 9,4% of the Respondents, and this low rate could be summarised by essentially three variables, given the individual interviews conducted to supplement the Survey:

- Lack of Awareness: It seems that businesses operating in Brazil are not fully aware of the potential opportunities associated with government procurement. They seem more focused on other, more fundamental issues, such as navigating local regulations, building relationships with suppliers and customers, or accessing financing.
- Limited Experience: Many European Union businesses operating in Brazil seem to have minimal experience with government procurement and, therefore, may not fully appreciate the potential prospects, magnifying the risks and challenges based on mere assumptions or, in the best-case scenario, a deficient number of unsuccessful experiences, which could be expected in any jurisdiction. They also cited not being familiar with Brazil's legal and regulatory framework governing procurement. They alluded to a few situations in which they have encountered, directly or indirectly, corrupt practices in their dealings with government entities.
- Complex Regulatory Environment and Few Players: Finally, some Respondents indicated that the EU businesses operating in Brazil have different priorities than other regions. They explained that they were more focused on expanding their market share, building partnerships with local companies, or improving their supply chain efficiency, and, as a result, might not view government procurement as a key issue.

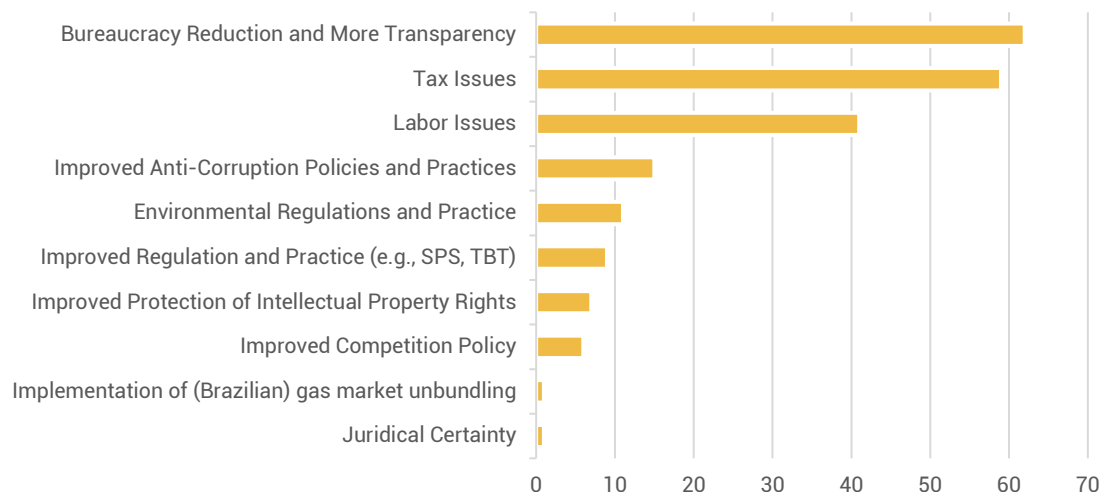
Essentially, these businesses revealed that they regarded government procurement as a low-priority issue compared to other challenges they face in Brazil because of the lack of transparency in what the potential gains indeed were and the perception that the “winners were always the same”.

Finally, Respondents in the segments of legal services and sanitation mentioned multiple correlated barriers to trade and suggested that these two sectors face significant barriers to entry for European businesses in Brazil, including a particularly-opaque public procurement environment.

## 2. Enabling Environment Business

Relating to the Priority Topics for the Respondents when addressing Brazil's 'Enabling Business Environment', i.e., policies, constraints, regulations and overall institutional environment that support or prevent the businesses' growth and development once they are fully operative in the country, are described and each Priority Topic is commented below:

### BUSINESS ENVIRONMENT: Priority Topics 2023



According to the Survey, '**Bureaucracy Reduction and More Transparency**' was indicated by 74,5% of the Respondents. '**Tax issues**', which refer to the tax-related challenges that businesses face, including tax rates, compliance, tax laws, lack of agreements to avoid double taxing, among others, were also a significant concern, with 71,7% of Respondents mentioning it as an urgency.

The third most important issue was the '[Labour Issue](#)',<sup>13</sup> mentioned by 45,3% of the Respondents, referring to the various labour-related challenges businesses face, including labour laws, worker protection, and working conditions.

Other issues that were considered necessary include '[Improved Anti-Corruption Policies and Practice](#)', recognised by 17.9% of Respondents, and '[Environmental Regulations and Practice](#)', detected by 13.2% of Respondents. '[Improved Regulation and Practice](#)' was also identified by 13.2% of Respondents and refers to technical and sanitary requirements that businesses must comply with '[Improved Protection of Intellectual Property Rights](#)'<sup>14</sup> was labelled as a topic of concern by only 9.4% of Respondents.

The low rate of those pressing issues, such as Environmental regulation and practice and Intellectual Property Rights, may indicate that the Respondents are not fully informed of the potential impact of these issues on their operations. Therefore, it may be necessary to raise awareness among companies about the importance of these issues.

### 3. Digital Economy

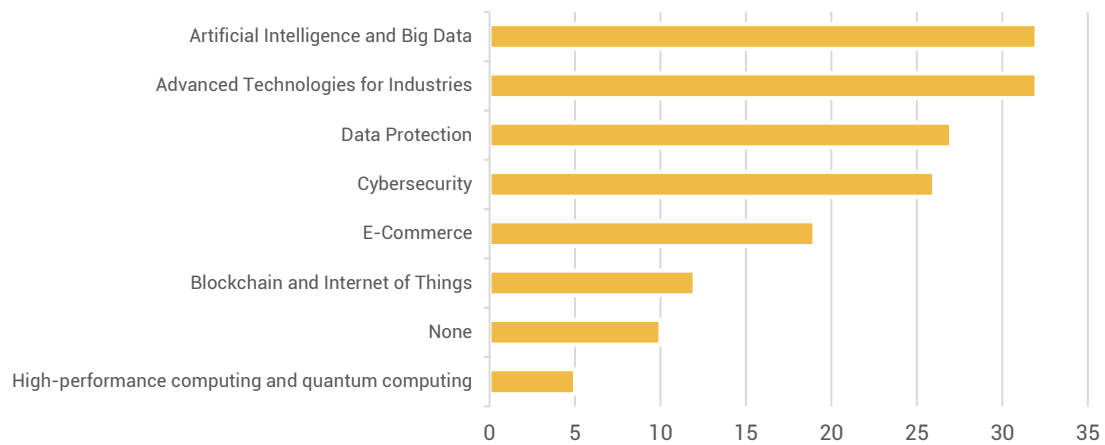
The Survey results show a diverse range of contributions, with each issue impacting the companies' operations differently, i.e., there are no clear preferences to one particular issue, differently from the other thematic areas. The percentages of the Survey responses and comments on each Priority Topic follows:

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<sup>13</sup> Regarding labour issues, Brazil has a complex and detailed regulatory framework. The Consolidation of Labour Laws (CLT) is the main legislation governing labour relations in the country. However, labour laws have been subject to recent changes, such as the Labour Reform Law (Law No. 13.467/2017), which aimed to modernize labour relations in the country.

<sup>14</sup> The Brazilian Industrial Property Law (Law 9.279/1996) and the Industrial Property Code (Decree 8.772/2016) provide the legal framework for the protection of Intellectual Property Rights in Brazil. The Brazilian government has also signed several international agreements and treaties, such as the Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS), which provide a framework for intellectual property protection.

## DIGITAL ECONOMY: Priority Topics | 2023



The largest share (46%) of Respondents mentioned [Artificial Intelligence](#) and [Big Data](#) as the most significant digital economy issue for their business. The Brazilian government recognises the potential of AI and has established policies to encourage investment and development in this area.

Secondly, 39% of Respondents identified [Advanced Technologies for Industries](#) as the most pressing issue. This finding aligns with the Brazilian government's commitment to fostering innovation and competitiveness in the industry as well as its efforts to promote digital transformation and innovation in the country.

The third issue raised was [Data Protection](#), and 36% of Respondents indicated that is the most critical issue affecting their operations. This result is not surprising as the European Union's General Data Protection Regulation (GDPR) applies to EU-based companies operating in Brazil, partially overlapping with the Brazilian LGPD.

Although they seem to understand that it is essential for companies to prioritise data protection to avoid potential legal and reputational risks and that these laws aim to shield personal data and ensure transparency and security in digital transactions, Respondents complained against Brazil's LGPD for its enforcement and cost of its implementation, as well as the inadequacy of sanctions and simultaneous lack of remedies for data breaches.

In similar voting level, 32% of Respondents mentioned [Cybersecurity](#) as a significant issue, reflecting the growing concern of businesses and governments regarding online security. At the same time, 30% of Respondents stated that [e-Commerce](#) has the most significant impact on their operations. Brazil has a legal framework that regulates e-commerce and establishes consumer rights.

A few topics received fewer votes: 16% of Respondents highlighted **Blockchain and the Internet of Things (IoT)** as the issue that most affect their operations. Brazil is one of the few countries with an IoT plan aiming to create a regulatory framework for the technology. In addition, 9% of Respondents mentioned **High-Performance Computing**, a crucial tool for businesses requiring advanced computing power. Lastly, 10% of Respondents indicated that none of the digital economy issues mentioned impacted their operations. This result raises the question of whether these companies are aware of the potential impact of digital issues on their operations.

The low rate of some pressing issues, such as 'blockchain and the internet of things' and e-commerce, however, is somewhat surprising, considering the mentioned rapid growth of e-commerce in Brazil<sup>15</sup> in recent years and may indicate a lack of awareness among European companies about how to benefit from these technologies in Brazil or the regulatory framework governing them. Respondents indeed implied that they needed clarification about which norms should apply to blockchain and the Internet of Things in Brazil, which may partially explain the relatively low number of companies highlighting these technologies as a top priority.

A couple of interviewed experts have also raised concerns about the enforcement and implementation of these new laws addressing the Digital Economy in Brazil, particularly with respect to data protection and cybersecurity.

Respondents also mentioned the Ella Link<sup>16</sup>, an ambitious project that connects Latin America and Europe through a high-speed digital infrastructure. The project involves laying a submarine cable that will connect Brazil, French Guiana, and Portugal, with connections to other countries in the region.

Finally, Respondents declared that policymakers and regulators should continue to disseminate knowledge about the benefits and challenges of these technologies and their regulatory framework to ensure companies can operate effectively in the digital economy. This could also be achieved through public-private partnerships, awareness campaigns, and targeted training programs for companies. DELBRA could play a crucial role in facilitating such activities by collaborating with Brazilian governmental agencies and industry associations.

#### **4. Climate, Environment, and Sustainability**

The Respondents have identified several Priority Topics in their operations in Brazil relating to environment and sustainability, which are individually commented below:

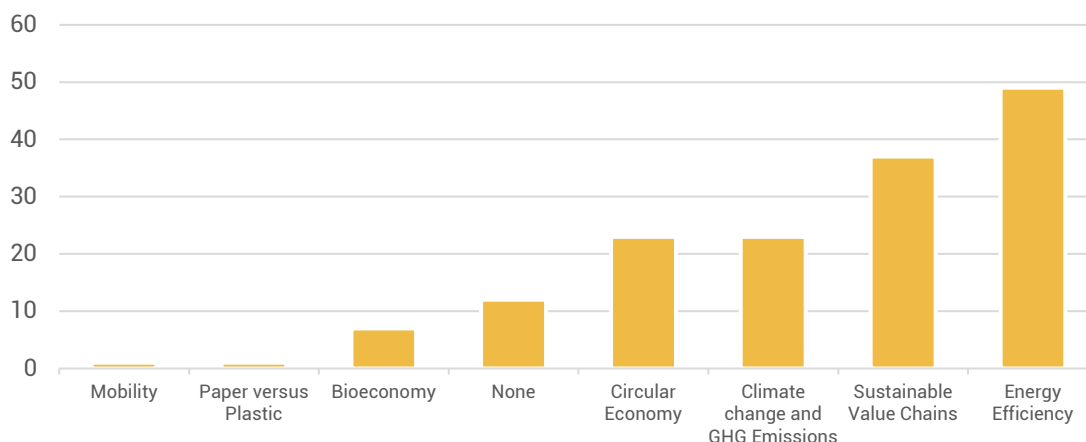
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<sup>15</sup> E-commerce revenue in Brazil grew by 182% in 2022 compared to 2017. Last access in June 2023, at <https://dados.abcomm.org/crescimento-do-ecommerce-brasileiro>

<sup>16</sup> <https://ella.link/>



## ENVIRONMENT: Priority Topics | 2023



At the top of the list was '**energy efficiency**', which 55% of the Respondents prioritised. This is a crucial area for Respondents to focus on as it not only reduces their environmental impact but mostly could also lead to cost savings and increased efficiency.

In addition, 46% of the companies emphasised the importance of '**sustainable value chains**'. This involves ensuring that all aspects of the Respondents' supply chain are environmentally responsible and sustainable, from sourcing raw materials to delivering the final product.

Next on the list, 29% of the Respondents indicated that the '**circular economy**' was their priority. This approach involves the Respondents reducing waste and ensuring that resources are used sustainably and efficiently.

In a close second, 26% of the companies surveyed highlighted '**climate change and GHG emission**' as their most pressing concern. Again, this is not surprising given the global focus and goals of reducing carbon emissions and mitigating the effects of climate change.

Interestingly, the KEs found that only 11% of the Respondents indicated that the issue of '**bioeconomy**' had the most impact on their operations. This approach involves using biological resources sustainably and efficiently.

The topics with lower rates, such as '**Mobility**' and '**Paper vs Plastic**', were suggested by the Respondents in their detailing of the "others" alternative of the Survey, but there were not initially in the form. Should there have been said options originally, Respondents might have also indicated them as priorities, as confirmed in supplemental Interviews afterwards.

Finally, the KEs were surprised to note that 18% of the companies responded that they had no issues related to climate, environment, and sustainability that would impact their businesses.

Regarding the Priority Topics in the Survey, the Respondents declared that Brazil has indeed made progress and enacted several laws and regulations related to climate change and sustainability, which are progressively more aligned with the EU norms and directives.

Having these developments in mind, Respondents vehemently concluded that there was great potential in developing sustainable innovation projects in the country, explicitly mentioning mobility, agribusiness, as well as green energies and fuels, of which advances the EU businesses view themselves as leading propellers and contributors.

# **Working Groups Within Eurocâmaras**

## G. The Bilateral Chambers

### 1. The Bilateral Chambers in Brazil

The Bilateral Chambers are associations representing individual EU Member-States' businesses interests operating abroad. These Chambers have been active for several decades in Brazil, with some dating back to the 19<sup>th</sup> century.

They provide a fundamental platform for European companies to network and connect with local clients or distributors, industry experts, and government officials.

The Bilateral Chambers are supported by and/or deeply connected with their respective Member-State governments, which are often sponsors, members, or observers. This support gives the Chambers a stronger voice in advocating for the interests of European businesses in Brazil.

The Bilateral Chambers have organised in their structure several different committees, not standardised in number or topics. Although not necessarily self-explanatory through their titles, the full list of committees per Bilateral Chamber, as indicated on their websites, may be found in Annex C below. Their discussion groups and taskforces naturally focus primarily on certain areas of interest aligned with the Member-States' specific priorities and competitive advantages.

### 2. The Respondents' Perceptions and Recommendations

Respondents confirmed that the Bilateral Chambers' committees provide members with concrete chances to share information more efficiently and already collaborate on EU's main areas of interest, i.e., projects that promote trade and investment, as well as environmental sustainability in business practices.

In addition to networking opportunities, Respondents volunteered that some Bilateral Chambers offer a range of invaluable services to them and other members, such as market research, business development support, legal advice, and assistance with regulatory compliance. Certain ones also highlighted quite effusively that they benefit from trade missions, seminars, workshops and other training sessions the Bilateral Chambers organise to help European businesses understand the Brazilian market better. Some of them go as far as to help them develop relationships with reputable and trustworthy local partners, either to co-produce or sell their products and services.

While not present in all Bilateral Chambers, Respondents testified that Advocacy is a crucial initiative to support a more favourable business environment in the countries they operate, identifying and reducing trade barriers. For instance, said Bilateral Chambers could play an essential role in advocating for simplified taxes and regulatory

coherence (i.e., harmonising EU trade rules and regulations with their extended markets), improving the investment climate, and addressing issues related to intellectual property rights.

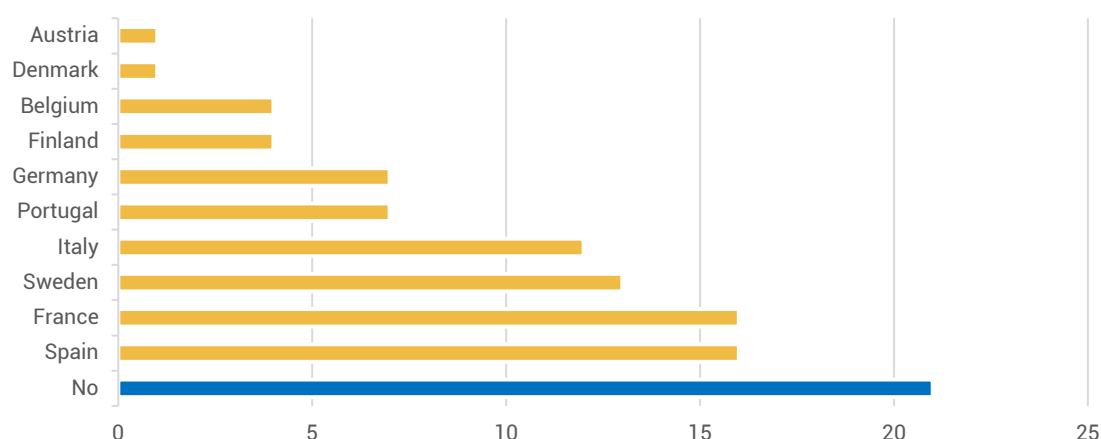
As per the Respondents' words, overall, the Bilateral Chambers play a critical function in promoting and strengthening EU-Brazil economic relations by fostering a constructive dialogue between the two regions. Not only on paper, but as their actual entry doors in Latin America, the Respondents perceive these Bilateral Chambers as essential ties between the EU and Brazilian business entities, providing platforms for dialogue, advocacy, mutual engagement and cooperation and advancing economic growth, trade, and investment opportunities.

By joining the Bilateral Chambers, Respondents affirmed that they gained access to an extensive network of business connections, information, and resources that helped them enhance their competitive edge and expand their business operations. On some occasions, they also leveraged the Bilateral Chambers' advocacy efforts to promote their interests and engage in meaningful dialogue with policymakers and regulatory authorities.

### 3. Eurocâmaras Bolstering the Bilateral Chambers' Scope

However, it is noteworthy and surprising that despite the considerable benefits of being a member of the Bilateral Chambers, multiple Respondents in this sample, including several sizable companies operating in Brazil, said they were not members of any of the mentioned Chambers:

#### Are you a member of an European Bilateral Chamber? If so, which one?



When questioned about their lack of association with them, Respondents indicated that most services offered by the Bilateral Chambers were already conducted internally.

Still, the access to a more robust, enhanced stand, such as Eurocâmaras or multiple Bilateral Chambers collaborating, would be desirable, apparently an added value that would represent significant gains to their operations, and an aspect that would encourage them to join one or more Bilateral Chambers.

From the Bilateral Chambers' standpoint, including new companies as their members would increase their representation of European businesses and enable them to address the concerns and interests of a broader share of their national corporate community.

The reinforced support and enhanced networking opportunities offered by the Bilateral Chambers unitedly could benefit these companies significantly and, conducted under Eurocâmaras, would strengthen the group's joint efforts, synergies, and initiatives.

Respondents also acknowledged that, except for a few occasions, most of the activities and underlying topics mentioned above are transversal and indeed of interest to the different segments of European businesses collectively and not exclusively to one or two nationalities.

Reaching out to the relevant European business associations is also advisable to understand their perspectives on forming an updated and revitalised Eurocâmaras and conducting it successfully once it is restructured, according to the Respondents. These organisations would surely have valuable insights into the needs and priorities of their respective industries and would be able to offer guidance on how to structure a more successful Eurocâmaras.

Ultimately, these added connections and joint efforts would strengthen Eurocâmaras employing greater collaboration and mutual understanding, leading to a more robust and sustainable EU-Brazil economic partnership.

For this particular Action, and having in mind this aspect of horizontal, common goals among Europeans, the Bilateral Chambers could play a crucial role as members of Eurocâmaras, and the analysis presented hereto contemplate several issues where Eurocâmaras can offer services that supplement, as opposed to compete, with the ones provided by the Bilateral Chambers. The goal, then, is to supplement, and not rival, granting the European business an improved and expanded set of tools to allow them to prosper in the country.

## H. Eurocâmaras

### 1. The Eurocâmaras in Brazil

The Eurochambres, with its 45 members representing over 20 million businesses in Europe, is one of the largest networks of chambers of commerce and industry worldwide. More than 93% of these businesses are small and medium-sized enterprises (SMEs), which employ over 120 million people.

Eurochambres has a presence in Brazil as well, named "Eurocâmaras". According to their own description, *"Eurocâmaras is the most representative organisation of the European business community in Brazil, consisting of more than 5000 European companies and factories. It is Eurochambres's official Brazilian partner, which represents over 2000 local and regional chambers"*.

### 2. Respondents' Expectations Concerning the Eurocâmaras

The Survey was conducted to understand the Respondents' priorities when questioned 'what interventions would you expect and want from the Eurocâmaras'. The Respondents' expectations of what Eurocâmaras could be doing to support and encourage their operations in Brazil were described as follows, together with comments and recommendations on each topic:

#### Services Expected from Eurocâmaras by Beneficiaries | 2023



**Monitoring and interpreting changes in relevant Brazilian regulations:** 50,9% of the Respondents indicated they would like support in this area. Eurocâmaras, with DELBRA's help, could monitor and interpret changes in relevant Brazilian regulations and provide guidance to European companies on how to comply with these regulations. Brazil has a complex regulatory environment, and Eurocâmaras could assist in navigating it.

**Advocacy with Brazilian authorities:** 46,2% of the Respondents indicated this issue impacted their operations. DELBRA regularly engages with Brazilian authorities on several of the Priority Topics identified in the Survey, and this initiative could be extended to empower Eurocâmaras and the Bilateral Chambers' scope and results. Armed with the created materials described above on issues related to their main themes of interest, alignment with DELBRA and then Advocacy with relevant Brazilian authorities, as per the Respondents' understanding, would then be enabled as an essential and primary activity for Eurocâmaras, employing online closed events and in-person hearings to establish and/or maintain good relationships with the said authorities, as well as lobby for policies and regulations favourable to European businesses operating in Brazil.

**Providing specialised information on regulations, policies, and negotiations:** 43,4% of the Respondents indicated they would like support in this area. Respondents suggested that Eurocâmaras should prioritise the generation of intelligence, i.e., specialised information on relevant general and specific Brazilian regulations, policies, negotiations and best practices, including those related to the main themes of interest, as these materials could immediately assist European businesses in understanding the complex regulatory changes and policy environment in Brazil and help them navigate negotiations with Brazilian partners. DELBRA could then also offer to EU businesses, through Eurocâmaras, information on relevant EU regulations and policies that may affect European companies operating in Brazil. By monitoring the regulatory environment, they can provide timely and relevant information to European headquarters. Interpreting said changes in applicable Brazilian regulations would be not only helpful but critical to keep European businesses informed about developments that may affect their operations in Brazil, ultimately allowing them to expand their manoeuvres intelligently.

**Support in organising visibility actions, such as conferences, seminars, and publications:** 39,6% of the Respondents indicated they would like support in this area. Initially, Eurocâmaras could assist in organising online events and publications that promote the interests of European companies operating in Brazil, gaining leverage and reducing the shared costs and resources among the Bilateral Chambers. At a later stage, they suggested that Eurocâmaras could host larger and even regional conferences, business networking events, seminars, and publications, an effective way to promote Eurocâmaras' activities and attract more businesses to join the Bilateral Chambers,



disseminating market intelligence and research. In addition, these events can provide a platform for European and Brazilian businesses to exchange ideas, network, and establish partnerships.

**Supporting the drafting of position papers on behalf of the European businesses:** 21,7% of the Respondents indicated that they would like support in this area. Eurocâmaras could, according to them, assist European companies in drafting position papers on issues relevant to their operations in Brazil to further influence policy and regulatory decisions in Brazil and improve the business environment for European companies. The EU has a number of policies and initiatives aimed at an improved regulatory environment, for example, and DELBRA could provide guidance on these issues under the Eurocâmaras's structure.

### **3. Recommendations for an Improved Eurocâmaras**

The complementary Interviews deepening the Survey's responses offered the KEs valuable ideas regarding what the Respondents believe necessary to amplify Eurocâmaras' role in the country. Although not part of the central scope of this Action, one cannot ignore these contributions, which should be, at least, reported for further consideration.

The ideal structure and scope of a more active and effective Eurocâmaras would depend on several factors, according to them, including the establishment of **revived goals and objectives**, through the consideration of the current needs and interests of the Bilateral Chambers' members. The Respondents also volunteered that they would welcome an association with a clearer mission, aligned with the shared needs of the European businesses operating in Brazil. For it to succeed, the Bilateral Chambers' full engagement would definitely be a must.

An operative Eurocâmaras would then need to have a solid and exclusive structure, supplemental to the Bilateral Chambers' structures, that allows it to effectively represent the interests of its members, generate content, create solid positions, and engage with key stakeholders in Brazil, including government officials, industry associations, and other business groups.

Finally, Eurocâmaras ideally would also pursue strong partnerships, covenants, and cooperation agreements with other business organisations and industry associations in Brazil and the European Union, in close collaboration with DELBRA, as well as European embassies and trade delegations.

# I. Working Groups Within Eurocâmaras

As described above, following the Respondents' perceptions, some of Eurocâmaras's core purposes should be to provide a forum for dialogue and collaboration among key European stakeholders in the public and private sectors, a platform for them to engage with the Brazilian government, as well as promote the shared interests of European companies in Brazil.

Considering the discussions above, as well as the specificities and knowledge needed to provide the required services to the Beneficiaries, the KEs sustain that the most practical manner of implementing the movements required and achieving the results desired by the European businesses is by structuring working groups within the Eurocâmaras's structure, as indicated in the ToR.

## 1. WG's Formation Methodology

The establishment of WGs under the Eurocâmaras's structure to address the priorities and needs within the main themes of interest of European industries in Brazil could be a valuable approach, provided that, as further detailed, the WGs are inclusive, effective, and representative, with leaders and members selected based on their expertise, commitment, and ability to contribute to the WGs' objectives.

The visions gained from the Survey could guide and shape the focus of these groups. By acknowledging the European companies' interests and concerns, the WGs should develop targeted initiatives that tackle the most pressing issues and help create a more supportive corporate ecosystem in Brazil.

The KEs employed a step-by-step methodology to structure Eurocâmaras's WGs; the following plan was based on the KEs' successful experiences of other Chambers of Commerce in Brazil and the world:

- a. **Analyse the Survey results:** The first criterion for forming the WGs was to identify the main thematic areas of interest for the European industries in Brazil through the Survey.
- b. **Setting scope and goals:** Based on the responses, KEs identified, within the main thematic areas of interest, specific Priority Topics that seemed to impact the Beneficiaries the most and required immediate attention. The next step would be defining concrete goals and objectives the WGs hope to achieve in regard to the Priority Topics.
- c. **Determine the WGs' composition:** The next step would involve determining the WG composition. This involves identifying the individuals or organisations that

would participate in the group and validating the roles and responsibilities of each member. Suggestions are offered hereto.

- d. **Establish criteria for selecting Leaders:** The next step is to define the WGs' leadership. This involve identifying individual characteristics, necessary skills and expertise to lead the WGs and achieve their goals. In order to ensure that the WG's leadership is effective, it is important to establish clear criteria for selecting their leaders.
- e. **Define the Leaders' roles:** Once the WGs' leadership has been outlined, it is essential to define the specific roles and responsibilities of the President, the Vice-President, and DELBRA's. The other members should have no specific roles or responsibilities, but merely to participate actively in the WGs' activities.
- f. **Establish governance structures:** Because the WGs must operate effectively, it is essential to establish clear governance structures, including rules and procedures for meetings, defining decision-making processes, and ensuring that the group operates in a transparent and accountable manner. Recommendations are offered further below.
- g. **Implement through workstreams:** To ensure that the WGs achieve their objectives in a timely and effective manner, it should be necessary to implement their activities through workstreams. This involves breaking down the overall goals of the group into smaller, more manageable tasks that could be assigned to specific individuals, as proposed below.
- h. **Identify other resources required:** Depending on the scope of the WGs, it will be necessary to identify additional resources that could be needed to achieve their objectives. This may include funding, personnel, or different types of support.
- i. **Implement and evaluate:** Once the WGs are established, it will be essential to implement their activities and assess their progress. The Leaders must suggest monitoring key performance indicators, subject to DELBRA's constant feedback, and making adjustments as necessary to ensure that the groups are able to achieve the Beneficiaries' objectives.
- j. **Learn from examples of successful chambers' models:** Finally, to make sure that the WGs are effective, it can be helpful to learn from the examples of successful chambers' models laid down here. This may also involve further studying the best practices of other organisations or seeking the guidance of these Chambers' management.

## 2. Working Groups' Purpose and Objectives

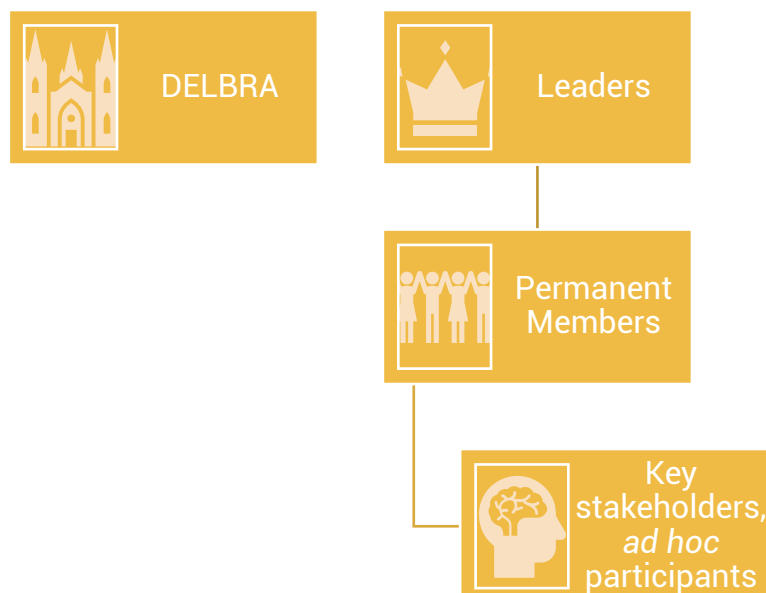
Within the Survey's main themes of interest and the specific Priority Topics, the WG leaders and DELBRA, supported by the other Beneficiaries and WG members, should define the immediate goals of each WG. The objectives should be specific, measurable, achievable, relevant, and time-bound (SMART).

## 3. WG's Composition

The proposed structure of the WG should be based on the successful models adopted by other chambers of commerce worldwide.

As for the ideal structures to address topics of interest among the European companies under Eurocâmaras, each WG should be composed of two leaders (one President and one Vice-President, from now referred to collectively simply as the "Leaders") and a representative from DELBRA, who will then work together with representatives from the European companies operating in Brazil, members of the Bilateral Chambers, inviting the invite of *ad hoc* key stakeholders who may be relevant for that particular topic and goal.

### WG's Structure



To ensure diversity and inclusivity within each WG, the Beneficiaries should consider the following methods:

- **Open application process:** Eurocâmaras should have an open application process that allows any interested party who is a member of the Bilateral Chambers to apply and join a WG.

- **Membership based on expertise and experience:** The WG's activities would be disseminated in the relevant channels of each main theme of interest, especially among the Bilateral Chambers. The visibility and exposure will attract Members to the WG based on their personal expertise in the relevant area, not limited but including their background, affiliation or company that they represent. The intention of an interested company to become part of the WG could be communicated to the institutional e-mail address of each group, to be created, to their Leaders, or else simply by joining the periodical meetings broadcasted by Eurocâmaras and the Bilateral Chambers. Participants should be excluded from the WG in highly exceptional circumstances, and only upon the unanimous decision of the Leaders and DELBRA.
- **Outreach to a diverse pool of potential members:** Eurocâmaras should consider including representatives from assorted industries, regions of Europe, gender balance, and diversity in terms of company size, ethnicity and age to ensure inclusivity and fruitful debates.

#### 4. WGs' Leadership

Each WG should be led by its President, supported by the Vice-President, both of whom should not be occupying leadership positions in the Bilateral Chambers themselves, considering the need for commitment to the WG's objectives and the Leaders' required seniority level, which typically entail a more limited number of hours to dedicate to the WG activities, which are voluntary and additional to their regular business hours.

Eurocâmaras should offer full visibility and support to both Leaders, as they should be the most capable professionals under the Bilateral Chambers' structure to carry out their tasks. Additionally, the Beneficiaries can provide opportunities for the Leaders to collaborate with other renowned industry professionals in Brazil and in the EU, as well as offer them recognition and awards for their contributions.

#### 5. Criteria for Selecting Leaders

The Bilateral Chambers should support the Eurocâmaras in broadcasting the opening of the leadership positions for each WG (a suggestion of a calling message can be seen in Annex D hereto). Among the volunteers, DELBRA and the Eurocâmaras' President should finally decide and nominate the WGs' Leaders, based on a transparent and merit-based selection process:

- Both leaders should be selected based on capacity, experience, availability, constant involvement with the topic at hand, and demonstrate a track record of success in addressing the main themes of interest, as well as commanding qualified teams. They should also be open and qualified to represent a diverse

range of perspectives, including different industries, regions, and stakeholder groups.

- Leaders should also be selected based on their ability to contribute to the WG's objectives, attesting to reasonable availability to comply with the group's goals and commitment to the tasks at hand. Regarding the amount of time each Leader should dedicate to these tasks, it is recommended they commit an average of 2-4 hours per week to lead and contribute to the group's work effectively.
- Ideally, both leaders be chosen simultaneously among the Bilateral Chambers' members. Alternatively, the President can be selected, and, subsequently, the Vice-President.

## 6. Leaders' Roles

Leaders should perform the following tasks within each WG:

- Organise the discussions:** The President will be responsible for leading and overseeing the group's activities, organising meetings, and ensuring that debates are productive and remain focused. The Vice-President will assist the President with the agenda, and minutes, drafting the report back to DELBRA and the Eurocâmaras' leadership, and act as a deputy to the President whenever needed.
- Focal Point:** The President will be the main point of contact between DELBRA, the WG, Eurocâmaras and other organisations, such as government agencies or other trade associations.
- Develop a work plan:** Once the scope, objectives and WGs' composition have been determined, the Leaders should develop a work plan for their WG, to be validated by DELBRA. The work plan should include a proposal of a timeline, specific tasks and responsibilities to be discussed and approved in the first WG meeting.
- Visibility:** Once each WG has completed its work plan, the Leaders and DELBRA must communicate the outcomes to the other Beneficiaries. This will help create awareness, joint validation, and promote the initiatives developed by the WG. The Bilateral Chambers could also play a crucial role in promoting the work of the WGs and ensuring that their recommendations and findings are disseminated widely to their respective constituencies, which will become progressively more robust to address the Beneficiaries' interests. This involvement is usually a progressive effort and will most likely start small and

gain traction by combining content dissemination and a visibility mechanism for the experts in each specific topic.

- e. **Performance:** The Beneficiaries, together with the Leaders, should, at their earliest convenience, establish a monitoring and evaluation framework that enables continuous learning, reflection, and adaptation. including, etc. The WGs' success should be then measured using a set of predefined evaluation criteria, including, but not limited to, the number of policy recommendations implemented, the level of industry engagement, the degree of regulatory cooperation achieved, an achievable number of open and closed meetings, webinars and congresses, the position papers prepared, among others.
- f. **Monitor and evaluate the progress:** The Leaders and DELBRA should then report to the Beneficiaries to allow them to regularly monitor and assess the progress of each WG and ensure that the objectives are being met. This can be done through quarterly meetings and/or progress reports and may include feedback from the other WG members.
- g. **Foster Efficiency:** Finally, they should ensure that the WGs are effective, focused, and responsive to the needs of the Beneficiaries and WG members.

## 7. DELBRA

Aside from the permanent structure of the two Leaders, DELBRA would also be a mandatory presence in the WGs, as indicated above. Each main area of interest should be covered by a different delegate, to be designated to follow the required activities, meetings, and propositions, as described hereto.

By participating in Eurocâmaras' WGs, DELBRA's Delegates, nominated among the most suitable to participate, according to the topic, capabilities, and official responsibilities, will be able to engage with European businesses in Brazil and act precisely on concrete matters as they appear and impact their constituents.

DELBRA should also guide the activities by sharing best practices and knowledge on the main thematic areas of interest and topics of priority detailed hereto, which are increasingly important in the context of EU-Brazil relations.

Moreover, DELBRA will be positioned to provide valuable insights to Eurocâmaras's WGs on the political and economic situation in Brazil and the EU, and help identify opportunities and challenges for European businesses operating in the country. This information can be used to inform EU policies in Brazil and to support the development of a more coherent and strategic approach to EU-Brazil relations.

Finally, DELBRA will hopefully have a pivotal role to play in the WGs upon the EU-Mercosur Agreement, should it be implemented, as they are responsible for negotiating and implementing trade policies and agreements.



## 8. Leaders' and DELBRA Delegate's Rotation

It is advisable for the WG to have a system of rotating positions to ensure that all members have the opportunity to take on leadership roles and contribute to the WG's goals. Rotation could also help maintain the Leaders' and the DELBRA Delegate's energy and motivation, prevent their burnout, and ensure that new voices and perspectives are constantly brought into the WGs. A reasonable timeframe for the Leaders' and the DELBRA Delegate's rotation could be every two years, depending on the size of the group, the existence of candidates equivalently qualified, and the complexity of the issues being addressed.

After the 2<sup>nd</sup> year, Eurocâmaras should make another call to select new Leaders and the DELBRA Delegate, and encourage the participation of the previous leaders and DELBRA's Delegate as WG honorary members to ensure the WG's progress and continuity. Should it be the members' and the leaders' interest, Beneficiaries can also decide to keep the same Leaders and the DELBRA Delegate for another 2-year period. Leaders for each WG can express their desire to continue coordinating the group's efforts, activities and goals, and the rest of the group must confirm this leadership or suggest another among the most qualified individuals among the Bilateral Chambers' members and DELBRA, as the case may be.

## 9. Other Recurring Members and *Ad Hoc* Participants

Aside from the permanent structure of the two Leaders and the DELBRA delegate, the WG's debates should be open and not rigid, welcoming all potential contributions among the members of the Bilateral Chambers.

Although not mandatory, a manageable number should be between 10-15 participants, as larger groups can become unwieldy and make it difficult to reach decisions. This number may vary depending on the scope and focus of each group and could be adjusted accordingly by the Leaders and DELBRA.

To achieve its objectives within the WGs, the Beneficiaries would need to involve a strong and diverse membership base, i.e., qualified representatives of members from the Bilateral Chambers from a somewhat wide range of industries and sectors. The Beneficiaries should also encourage training and capacity-building programs to enhance the member's skills and knowledge.

Initially, the WG Leaders, DELBRA and the Bilateral Chambers should organise regular meetings, webinars, and events for local executives and experts to network and discuss with *ad hoc* participants relevant topics, share information, in order to engage them to be part of the WGs.

For debates to be more fruitful, the President and Vice-President should encourage the involvement of members representing various industries, stakeholders, and experts. The ideal WG membership includes representation from the primary industries among the members of the Bilateral Chambers.

The recurring members could be reinforced by *ad hoc* invitations to civil society organisations, foreign investors, trade associations and labour unions, technology firms, start-ups, and academia. On specific occasions, then, relevant industry associations, stakeholders from the Brazilian government and civil society can be invited for the discussions, as needed, either as speakers or observants:

- **Business Associations:** Brazilian and European business associations have a significant interest in the WGs' performance, as they represent the interests of businesses that trade between Brazil and the EU. They should be allowed to provide input on the priorities and objectives of each group and help identify concrete measures to address their Priority Topics.
- **Civil Society Organizations:** Civil society organisations could have an important role to play, particularly in promoting sustainable trade, protecting the environment, and ensuring social access through digital mechanisms. They could also provide input on the sustainability workstream and engage with businesses and governments to promote responsible trade practices.

## 10. Governance

Governance in WGs could follow some best practices observed in Eurochambers globally. The WGs' governance should prioritise inclusivity, transparency, and collaboration. By adopting these best practices, the WGs can make a meaningful contribution to the European business community in Brazil and enable the Eurocâmaras' mission of promoting trade and investment between Brazil and Europe. Here are some proposals on how governance could occur in the WGs:

- **Establish a clear mandate:** Each WG should have a clearly defined mandate that outlines its goals, objectives, and expected outcomes. This will help ensure that the group remains focused and productive.
- **Invite diverse membership:** Also, in terms of membership, WGs' Leaders and DELBRA should invite members from a diverse range of sectors, including SMEs, women-owned businesses, and minority-owned businesses, to ensure a broad representation of the European business community. This will help ensure that the group's recommendations reflect the needs of a wide range of stakeholders, i.e., that the views and interests of these groups are adequately represented in the development of trade policies and regulations.

- **Establish open communication channels:** WGs should establish communication channels, including regular meetings, email lists, WhatsApp groups, and/or online collaboration tools, to ensure that all members are kept informed and can contribute to the group's work. The WG members should be encouraged to share their expertise and knowledge and
- seek innovative solutions to the challenges the European industry is facing in Brazil.
- **Define decision-making processes:** Given that the WGs should be able to make effective decisions, it is crucial to define transparent decision-making processes. Recommendations are offered below.
- **Communication** between members of the WG and external stakeholders should typically be conducted via email, WhatsApp or through an online collaboration platform. Members are encouraged to communicate openly and frequently to ensure that everyone is kept informed of the latest developments.

## 11. Rules and Procedures for Meetings

The WG Leaders and DELBRA should adopt a collaborative approach involving regular meetings to discuss critical issues and establish action plans. The WG should follow the set of rules and procedures below to ensure that meetings are conducted efficiently and effectively:

- In order to ensure that the WGs are going to be able to achieve their goals, it is essential to determine **the frequency of meetings**. Bi-monthly meetings can be more feasible in the beginning, but ideally the meetings should progress to occur every month.
- Meetings are typically held on a **regular basis** (initially every two months, but ideally once a month) in a predictable manner (e.g., the fourth Wednesday of the month, every two months).
- The **invitations** for the meetings, debates and events should be planned and disseminated at the beginning of the year and reminded again 20 days before each event.
- The **agenda** for each meeting should be prepared in advance and circulated to all members together with the reminder mentioned above, allowing them to prepare their contributions and provide feedback on the items to be discussed.

- The members should assess **progress**, talk about changes in regulations, address concrete challenges, and brainstorm possible recommendations.
- The meetings should be conducted in a professional and **respectful manner**, with a focus on achieving results.
- The WG should take advantage of digital tools to enable **virtual participation**, as needed to engage participants from all over Brazil and even abroad.
- **Minutes** are taken during each meeting to record the decisions made and actions to be taken by the Vice-Presidents or someone assigned by them.

## 12. Decision-Making Process

The WGs should follow a majority-based decision-making process. This means that decisions are made based on agreement among the majority of members of the group, who are encouraged to express their opinions and provide input during discussions. The WG President should ensure that all members have the opportunity to express their views and that the debate remains focused on the issue at hand. Once a consensus has been reached, or at least a majority is set, the decision is implemented.

## 13. Implementation Through Workstreams

Upon formation, the WGs would tackle issues within “**International Trade, Foreign Investment, and Economic Policies**”, “**Enabling Business Environment**”, “**Climate, Environment, and Sustainability**”, and, if possible, “**Digital Economy**”.

The following is an overview of the different workstreams within the taskforce group, including their objectives and deliverables, as well as the key stakeholders and resources required for each workstream. The Priority Topics identified for each main thematic areas of interest, as detailed in the above Section F of this Report, must be considered and validated by the members for their relevance in their discussions.

**WG 1:** The **International Trade, Foreign Investment, and Economic Policies** Working Group focuses on strengthening bilateral trade relations between the EU and Brazil.

**Objective:** The objectives of this workstream are to promote international trade, foreign investment, and economic policies that are favourable to the growth and development of businesses between the EU and Brazil, to identify opportunities for market access, to reduce trade barriers, and to promote the establishment of a stable and predictable regulatory environment.

**Deliverables:** The deliverables of this workstream include the development of policies that promote trade, investment, and economic growth, the

establishment of networks and partnerships with key stakeholders, as well as policy recommendations and advocacy activities aimed at fostering closer economic ties between the two regions.

**Key Stakeholders:** Key *ad hoc* stakeholders in this group to be invited to the discussions would be Brazilian government officials from the Ministry of Development, Industry and Trade, Ministry of Foreign Affairs, industry associations, and companies engaged in international trade. Similar organisations in Mercosur could be invited as well in order to create implementation strategies should the EU-Mercosur Agreement progress.

**Resources Required:** This workstream requires access to data on global trade, foreign investment, and economic policies. It also requires access to experts in international trade and investment.

**WG 2:** The **Enabling Business Environment** Working Group aims to promote a more favourable business environment for European companies operating in Brazil.

**Objective:** The objective of this workstream is to create an enabling business environment that supports the growth and development of European businesses in Brazil and identify and address tax, regulatory and administrative obstacles that hinder business progress and investment.

**Deliverables:** The deliverables of this workstream include the development of policies and strategies that promote a favourable business environment, as well as the establishment of partnerships and networks that support business growth by means of position papers, policy proposals, regulatory reforms, and capacity-building activities.

**Key Stakeholders:** Key *ad hoc* stakeholders in this group to be invited to the discussions would include Brazilian government agencies of the Ministry of Finance, business leaders, industry associations, regulatory bodies, and legal and accounting professionals.

**Resources Required:** This workstream requires access to data on the business environment, including regulatory requirements, tax policies, and legal frameworks. It also requires access to experts in business development, entrepreneurship, and innovation.

**WG 3:** The **Climate, Environment, and Sustainability** Working Group aims to promote sustainable development and environmental protection in Brazil.

**Objective:** The objective of this workstream is to promote environmental sustainability, address the challenges of climate change and identify

opportunities for cooperation and partnership in the areas of renewable energy, circular economy, and sustainable agriculture, among others.

**Deliverables:** The deliverables of this workstream include the development of policy recommendations, advocacy activities and strategies that promote environmental sustainability, as well as the establishment of partnerships and networks that support sustainable development.

**Key Stakeholders:** The key ad hoc stakeholders for this workstream include government officials of the Ministry of Environment and Climate Change, the Ministry of Agriculture and Livestock, the Ministry of Mines and Energy, environmental organisations, renewable energy companies, businesses, financial institutions, scientists, community groups and other agencies responsible for environmental protection.

**Resources Required:** This workstream requires access to data on environmental sustainability, including trends in climate change, energy use, and natural resource management. It also requires access to experts in environmental science, sustainability, and renewable energy.

**WG 4:** The **Digital Economy Working Group** focuses on promoting digital transformation and innovation in Brazil, as well as fostering digitalisation, innovation and technology transfer and regulatory convergence in critical areas between the EU and Brazil.

**Objective:** The objective of this workstream is to promote the growth and development of the digital economy, including e-commerce, digital payments, and other digital technologies, and identify opportunities for cooperation and partnership in the areas like digital infrastructure and cybersecurity.

**Deliverables:** The deliverables of this workstream include the development of policies and strategies that promote the growth of the digital economy, as well as the establishment of partnerships and networks that support digital innovation and foster a regulatory environment supportive of digital businesses.

**Key Stakeholders:** Key *ad hoc* stakeholders in this group include industry representatives from companies involved with information technology, biotechnology, and research and development, as well as relevant government agencies such as ANPD and research institutions. The criteria for selecting and engaging members should include their expertise in innovation and technology transfer, their experience in working with Brazilian counterparts, and their willingness to contribute to the group's objectives.

**Resources Required:** This workstream requires access to data on the digital economy, including trends in e-commerce, digital payments, and other

technologies. It also requires access to experts in digital innovation, technology development, and digital marketing.

The success of each workstream will depend on the Leaders' commitment, DELBRA's active involvement, the cooperation and collaboration of members and key stakeholders, as well as access to the necessary resources and expertise. By working together, these workstreams can help promote economic growth and development while addressing critical social and environmental challenges faced by the EU industry in Brazil.

## 14. Other Resources Required

In terms of resources required for each workstream, the Bilateral Chambers' members and the Bilateral Chambers themselves could volunteer personnel, financial resources, and technological infrastructure to support the work of each group.

Additionally, the Beneficiaries must collaborate with DELBRA, the WG Leaders, the WG's members and *ad hoc* stakeholders to ensure that the necessary expertise and resources are available to achieve the objectives and deliverables of each workstream.

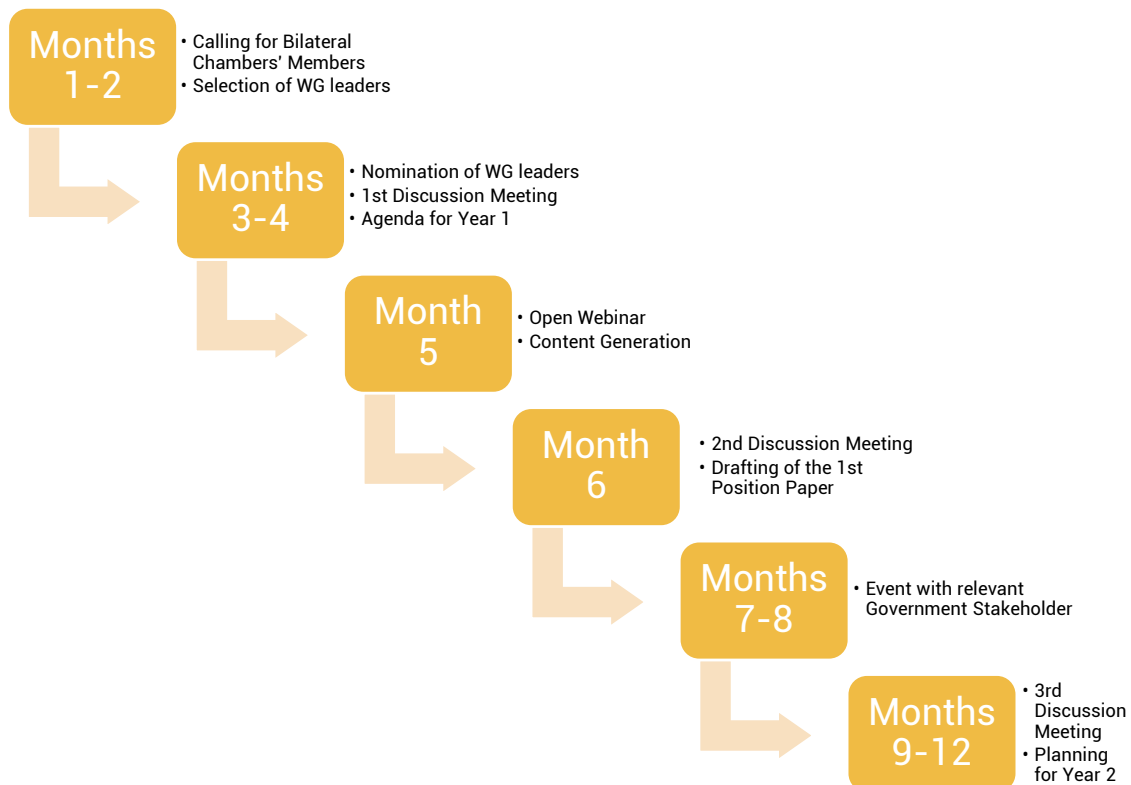
Paid events, webinars and materials produced by the WG could be used to monetise the activities and generate additional revenue inflows.

In addition to each workstream identified above, there are several resources relevant to multiple workstreams, including:

- **Data:** Trade data, investment data, IPR data, and sustainability data will be required for each workstream. This data will be used to identify trade barriers, investment opportunities, IPR infringement cases, and sustainability challenges.
- **Legal Expertise:** Legal expertise will be required for negotiating and implementing trade policies and agreements, protecting investments, enforcing the industries' rights, and developing sustainable trade policies.
- **Analytical Tools:** Analytical tools, such as economic modelling and impact assessments, could be required to measure the potential impact of trade policies and agreements on various stakeholders.

## 15. Implementation and Evaluation

Based on the successful experiences of Chambers of Commerce around the world, the KEs propose the following timeline for the 1<sup>st</sup> year of WGs' implementation:



### Months 1-2:

- **Calling for Bilateral Chamber" Members:** The Eurocâmaras will send out a call for the Bilateral Chambers' members of to join the WGs, as described above. The call will be distributed through all their communication channels, including website, social media, and mailing lists.
- **Selection of WG Leaders:** Eurocâmaras will select the leadership for each WG among the members of the Bilateral Chambers. A suggestion for the calling message can be found below in **Annex D**.



#### Months 3-4:

- **Nomination of WG Leaders:** DELBRA and the Eurocâmaras' President will nominate the selected leaders for each WG. The appointed Leaders will then be contacted and informed of their roles and responsibilities, and their names and biographies will be broadcasted among all Bilateral Chambers' mailing lists.
- **1<sup>st</sup> Discussion Meeting:** The WG will hold their first meeting to discuss their goals, objectives, and strategy, with an agenda previously set and shared. The Leaders and DELBRA's Delegate will introduce themselves and suggest their first specific Priority Topic to address, considering, but not limited to, the ones indicated in the Survey.
- **Agenda establishment:** Under the coordination of their Leaders and DELBRA's validation, the WGs will establish their agendas for the coming months. They will prioritise the issues they want to address and set deadlines for their deliverables.

#### Month 5:

- **Open Webinar:** Eurocâmaras and the Bilateral Chambers will support the Leaders and DELBRA to organise an open webinar to promote the WG's activities and engage with the broader business community. The webinar will present the WG's objectives and activities and provide an opportunity for attendees to brainstorm, ask questions and provide feedback.

#### Month 6:

- **2<sup>nd</sup> Meeting to Discuss Position Paper:** The WG will hold their second meeting to discuss its first position paper, which is a manner to organise the members' ideas and propositions to external parties (e.g., the Brazilian relevant government agency that could be part of the necessary intervention). The paper will summarise the group's objectives, the issues they are addressing, and their proposed solutions. The group will finalise the paper draft after this meeting.
- **1<sup>st</sup> Position Paper:** The WG will produce their first position paper. The paper will outline the group's stance on the issues they are addressing, their proposed solutions, and their recommendations for relevant stakeholders.

#### Months 7-8:

- **Event with a Relevant Government Stakeholder:** Eurocâmaras and the Bilateral Chambers will support the Leaders and DELBRA to organise a paid closed event with a relevant government stakeholder, exclusive to the C-level of the relevant members. The WG will present their position papers to the stakeholder and

engage in a discussion to explore collaboration opportunities. The stakeholder will be selected based on their relevance to the issues addressed by each WG.

#### Months 9-12:

- **Meeting-- planning for Year 2:** The WG will hold a meeting to plan their activities for the second year. Its members will evaluate their progress during the first year, identify areas of improvement, and set new goals and objectives for the upcoming year.
- **Final Report:** The WG Leaders should consolidate a final yearly report to DELBRA, consolidating the results of each quarter, highlighting achievements, lessons learned, and recommendations for future collaboration.

## 16. Examples of Successful Chambers' Models

It is worth noting that exemplary Eurochambers worldwide have successfully implemented initiatives similar to this Action, likewise the model that the Respondents envisioned for Eurocâmaras, and could provide valuable insights into forming a more robust Eurocâmaras:

- The European Union Chamber of Commerce in China (EUCCC) has established various working groups that focused on issues such as market access, intellectual property, and sustainable development. These working groups have been effective in representing European industries in China, actively participating in the overall improvement of the business environment for their constituents operating in the region. The EUCCC is a well-established chamber of commerce, although they would differ from Eurocâmaras' model, as their members are the European businesses in China directly, as opposed to the Bilateral Chambers.
- Similarly, the Eurochambers in ASEAN has established various working groups that focus on issues such as trade and investment, sustainable development, and digitalisation, which have been instrumental in promoting European businesses in ASEAN, contributing to the overall growth of the region.
- The European Business Organisations Worldwide Network (EBOWWN) is a valuable resource for understanding the global perspective on forming and managing chambers of commerce. By drawing on the experiences and knowledge of European chambers of commerce and business associations around the world, EBOWWN could provide valuable insights.
- Eurochambers Korea and Eurochambers Myanmar, have successfully established working groups to address specific priority areas. By focusing on those said areas, as well as engaging with the government and other

stakeholders, these Eurochambers have been able to align forces, address the concerns of foreign investors in critical sectors of their economies and even actively participate in the drafting of a new law that addressed such concerns.

- Other organisations worldwide have established strong networks of members and represent diverse industries in their respective countries, having been genuinely successful in promoting trade and investment with the rest of the world. Examples of exemplary Chambers of Commerce around the world cited by the Respondents and that should be further investigated include the British Chamber of Commerce in Belgium and the Netherlands, the Italian Chamber of Commerce in Australia, the Belgian-Luxembourg Chamber of Commerce in Japan, the Swedish Chamber of Commerce in Hong Kong, the British Chamber of Commerce in Brazil, the German Chamber of Commerce in China, and the Spanish Chamber of Commerce in Mexico, the French Chamber of Commerce in Singapore, the Dutch Chamber of Commerce in Hong Kong, and the Finnish Chamber of Commerce in Japan, the Norwegian Chamber of Commerce in Japan, the Austrian Chamber of Commerce in Vietnam, and the Danish Chamber of Commerce in China. The American Chamber of Commerce in Germany, the British Chamber of Commerce in Belgium, and the French Chamber of Commerce in Japan.

## J. Final Remarks and Recommendations

As the EU and Brazil continue to deepen their economic ties, this Action generated what can be indispensable tools for European companies seeking to expand their operations in Brazil. *Firstly*, its execution enabled valuable insights about the Respondents as a sampled group of the European industry in Brazil. *Secondly*, the proposed WGs within Eurocâmaras, if implemented, can provide a platform for European companies to engage with relevant stakeholders and advocate for policy changes that will facilitate investment and trade flows between the EU and Brazil.

Aside from the conclusions described in this Report, Respondents signalled in their individual interviews that European companies operating in Brazil suffer from various challenges and miss opportunities in different sectors. To name a few, findings of the Respondents' interviews follow.

In the automotive sector, European branches and subsidiaries encounter intense competition from both local and international players. Brazil's complex tax system, high labour costs, and bureaucratic regulatory environment were mentioned as considerable obstacles for European companies' optimal performance. However, as per the interviews, Brazil's increasing demand for automobiles present substantial prospects for European companies in the long term.

In the chemical sector, the Respondents reported hurdles relating to environmental regulations, high energy costs, and stiff competition from Asian companies. However, Brazil's abundant natural resources supposedly provide openings for European companies to invest in sustainable production and innovation.

In the machinery and equipment sector, Respondents see themselves obliged to overcome the lack of skilled labour and a complex business environment. However, Brazil's infrastructure development projects, such as the construction of new airports and ports, allegedly provide significant chances for European companies to invest in new technologies and innovative solutions.

A regular and structured dialogue under the Eurocâmaras's platform seems to be fundamental for the EU economic diplomacy in Brazil. This would enable promoting EU main concerns more effectively under a single focal point, highlighting the relevance and scope of the European investment in the country. A structured dialogue will also enable the identification of strategic actions to be implemented through an empowered Eurocâmaras, adding value to the activities of DELBRA, of the Bilateral Chambers in Brazil and, overall, of EU industry in this country.

Despite the noteworthy financings made by the European industry in Brazil, there are still numerous and steep complications described by the Respondents, such as high taxation, bureaucratic procedures, and regulatory barriers. The Survey conducted by DELBRA found that many European companies are convinced that policies should be implemented to improve the business environment and reduce bureaucracy, allowing the flourishing of trade and investment flows.

The Respondents stressed that the challenges are undeniable, but the Brazilian market offers incontestable breaks for the European industry: the country's large population, its growing and young middle class, and abundant natural resources make it an appealing market for European companies. Additionally, the Brazilian government has implemented various measures to attract foreign investment, including tax incentives, infrastructure projects, and privatisation of state-owned companies.

Brazil's business environment can be problematic for foreign firms, with administrative hurdles, unnecessary paperwork, and complex regulations being some of the common obstacles. As such, Respondents considered it crucial for European companies to combine efforts to conduct thorough market research and seek guidance from local experts to navigate the Brazilian market more successfully.

Finally, from the results of the Survey, the KEs could draw some conclusions about the Respondents' priorities in regard to Eurocâmaras. Advocacy with Brazilian and European authorities and monitoring and interpreting changes in relevant Brazilian regulations are the two activities that received the most votes from the Respondents, indicating that they consider these services practically compulsory. Providing specialised information on regulations, policies, and negotiations and support in the organisation of visibility actions are also highly valued by the Respondents.

Overall, the aspect that most of them highlighted was the need for a channel to communicate and address as a group the challenges several of them were going through individually, and this statement is in perfect alignment with the Action at hand.

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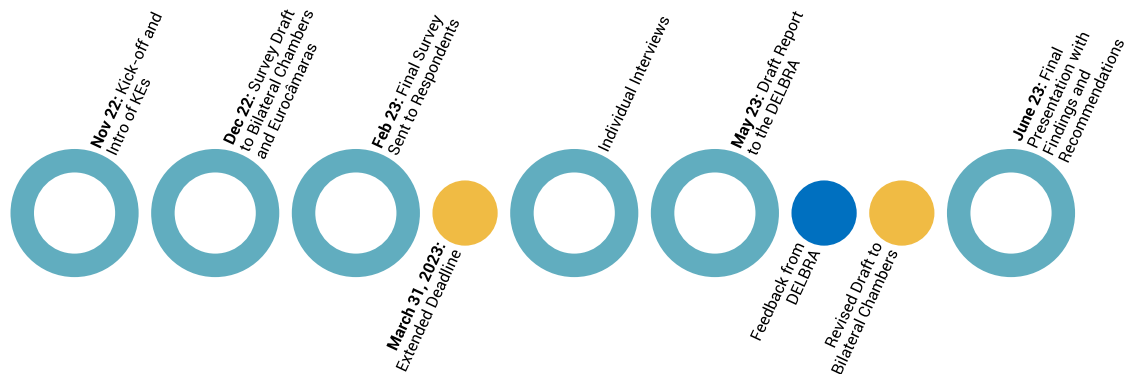
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# Annex A. Further Methodological Details

## 1. Action Milestones

The KEs followed the steps described below for a successful outcome of this exercise.



## 2. Survey Roadmap

- a.** A letter from DELBRA and the EU-Brazil Dialogues Support Facility introduced the KEs to the Beneficiaries to gain trust and engagement for the Action;
- b.** An institutional email, “Eurochambras Dialogues” ([eurochambrsdialogues@sideraconsult.com](mailto:eurochambrsdialogues@sideraconsult.com)), was created to send out the form and link.
- c.** Before sending the Survey to the target audience, the KEs:
  - o submitted the Survey for the Bilateral Chambers’ comments, review, and validation. A Final version of the Survey was generated.
  - o tested the revised Survey to ensure it is functioning correctly and provided accurate results. This was done by conducting a pilot study with a smaller group of participants.

d. The Survey online link was disseminated, and data were collected in several ways<sup>17</sup>, among which:

- directly on the email from the Bilateral Chambers to their members;
- directly on the email from government agencies and economic attachés to their constituents;
- directly on the email from the KEs to key stakeholders;
- on the link to the form sent by WhatsApp, LinkedIn, and other media.

More than 200 individual emails, with customised messages, and an estimated number of 800 members from the Bilateral Chambers' and the EU Members' Governments' mailing lists were sent to the European businesses in Brazil. The deadline was extended multiple times until the final date of March 31, 2023, when the data collection was considered concluded (please refer to the topic "[Carnaval, Easter, Pesach and Other Time Constraints](#)" in the section "Survey Limitations below).

e. Follow-up online/in-person Interviews with selected participants (fifteen in total, lasting on average 1h30 each and supplemental messages after) were conducted to provide more details on the topics of the Survey.

f. The KEs also recommended thematic webinars with officials from the Brazilian and European Governments plus specialists from the private sector, disseminating knowledge and the Survey itself, which have not taken place yet, because of time constraints. The findings discussed below indicate that this exercise could still be beneficial to create stronger WGs, as detailed further.

g. Finally, the KEs analysed the data and reached relevant findings presented hereto.

### 3. Survey Structure

The Survey contained nineteen questions, short and easy to complete, in an average of nine minutes in total. It was crucial to keep the form concise and straightforward, even if, because of these constraints, it failed to address topics that could be valuable.

Questions involving revenue, number of employees, and level of investment, which could be more sensitive, were classified as non-mandatory. The KEs avoided using leading or loaded questions. Both sets of topics were otherwise addressed in the

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<sup>17</sup> Initially, the KEs intended to distribute the Survey using the online paid tool Survey Monkey, which allows for easy collection and data analysis. However, the form was eventually distributed with the tool from Microsoft, "Microsoft Forms", which has shown to be more limited and less user friendly. The results had to be analysed through manual analysis, rather than a module adaptable to PowerBi.

individual interviews with selected Respondents who volunteered for a follow-up conversation.

In the Survey introduction, the KEs communicated the purpose of the exercise and how the results would be used. This was intended to create context, help companies understand the value of completing the Survey and give them a sense of ownership over the process.

The first three questions were posed in order to collect data regarding the profiling of the Respondents, including nationality, segment, and number of employees.

- .1. **Employment:** In Brazil, the classification of companies by size follows the guidelines established by the CNAE and IBGE. According to IBGE, the categories for the size of a company are defined by the total number of employees and annual gross revenue. The KEs followed said IBGE's parameters to allow the Respondents' grouping into four categories, i.e., Micro, Small, Medium, and Large.
- .2. **Segments** were proposed based on the most relevant segments of European investment in Brazil, according to the United Nations Economic and Social Affairs (UNESA) Industry Classification (ISIC)'s terminology.

In the second section, the questions searched for the understanding of what was critical for the Respondents' operation in Brazil, clustering the topics into four large thematic groups "**International Trade, Foreign Investment, and Economic Policies**", "Enabling Business Environment", "Digital Economy", and "Climate, Environment, and Sustainability". The KEs also asked how DELBRA could support each organisation in their priorities.

#### **Clusters of Respondents' Main Thematic Areas of Interest and Topics of Priorities**

To gather relevant data and facilitate the responses on the priorities of European companies operating in Brazil through their branches or subsidiaries, the KEs employed a clustering methodology to group the most frequently mentioned topics from various sources reviewed, including the business world, media, and literature. The KEs identified four clusters of main interest and provided an option for Respondents to indicate "other" or "none" when none of the presented options aligned with their opinions.

The four clusters of interest, as outlined above and transcribed in Annex A, were "**International Trade, Foreign Investment, and Economic Policies**," "**Enabling Business Environment**," "**Digital Economy**", and "**Climate, Environment, and Sustainability**."

The first cluster, "International Trade, Foreign Investment, and Economic Policies," refers to issues related to the global economy, foreign investment policies, and trade regulations. Literature such as the

World Bank's "Doing Business" report<sup>18</sup> and the European Union's "Trade and Investment Barriers Report"<sup>19</sup> demonstrate the importance of this cluster for companies operating in Brazil.

The second cluster, "Enabling Business Environment," focuses on factors such as infrastructure, labour regulations, and ease of doing business. The World Economic Forum's "Global Competitiveness Index"<sup>20</sup> emphasises the significance of these factors for business operations in Brazil.

The third cluster, "Digital Economy," pertains to technological advancements and their impact on business operations. The literature shows that Brazil has made strides in developing its digital economy, as evidenced by its high ranking in the "Global Innovation Index"<sup>21</sup> and the abruptly increasing adoption of e-commerce.

Finally, the fourth cluster, "Climate, Environment, and Sustainability," reflects the growing importance of environmental and sustainability issues for businesses. Reports such as the Global Reporting Initiative's "Sustainability Reporting Guidelines"<sup>22</sup> and the Intergovernmental Panel on Climate Change's "Special Report on Global Warming"<sup>23</sup> highlight the need for companies to address environmental concerns in their operations.

Overall, the four clusters identified through our clustering methodology provide a comprehensive framework for understanding the priorities of European companies operating in Brazil through their branches or subsidiaries.

The following set of questions concerned the investments made, if any, and their magnitude.<sup>24</sup>

Subsequently, the form questioned whether the Respondent was available for additional interviews to detail their response and how to be contacted.

Finally, the questions were targeted at the profiling of the Respondent, including the company's name, the representative's name, their position, presence in Brazil, whether they participated in any Chamber of Commerce and which, and their contact information.

The Survey was sent in Portuguese and English, considering people are more likely to engage with a Survey that is tailored to their capabilities.

#### 4. Survey Limitations

<sup>18</sup> <https://www.doingbusiness.org/en/reports/global-reports/doing-business-2022>

<sup>19</sup> <https://ec.europa.eu/trade/policy/accessing-markets/trade-barriers/> and <https://trade.ec.europa.eu/access-to-markets/en/barriers/results?isSps=false&countries=BR>

<sup>20</sup> <https://www.weforum.org/reports/the-global-competitiveness-report-2019>

<sup>21</sup> [https://www.wipo.int/global\\_innovation\\_index/en/2021/index.html](https://www.wipo.int/global_innovation_index/en/2021/index.html)

<sup>22</sup> <https://www.globalreporting.org/standards/>

<sup>23</sup> <https://www.ipcc.ch/sr15/>

<sup>24</sup> 'Investment levels' followed the parameters of Eurostat, the statistical office of the European Union, which uses a standard classification system to measure the size of an investment made by a company. This classification system is called the European Classification of Size Standards (ECSS).

The KEs faced several limitations in using the Survey when trying to understand the experiences of European businesses operating in Brazil. Some of these limitations included:

- **Carnaval, Easter, Pesach and other time constraints:** The Action's timeline coincided with several periods in which engagement is quite hard to get in Brazil, starting on Christmas, New Year and then other festive periods. Therefore, as the KEs attempted to gather insights into the experiences of European businesses operating in Brazil, they faced several limitations related to time constraints and holidays. The KEs had to ensure that the survey was conducted during a time when respondents were likely to be available and able to provide thoughtful and comprehensive answers, and extensions were granted many times, reducing the period of analysis after the conclusion of the data collection. Additionally, the KEs had to be mindful of holidays and other events that might impact respondents' availability and attention. These time constraints and holidays made it challenging to gather a representative sample of responses, mainly because the C-level was targeted and naturally less available. The KEs had to take extra care to ensure that they captured a diverse range of perspectives. Despite these challenges, the KEs were able to gather valuable insights that can inform policy decisions and support European businesses operating in Brazil.
- **Lack of participation:** One of the primary and prevalent obstacles encountered with surveys is the absence of involvement. Regardless of the survey's adequacy and relevance, incomplete or biased outcomes may occur if the respondents do not contribute. This predicament is often more significant when conducting surveys among business owners or managers who may have limited time to allocate for survey participation. Thus, it was essential for the KEs to be persistent in capturing the respondents' attention, considering that the survey presented a unique and advantageous opportunity for the respondents' interests, which should not be overlooked for their own benefit.
- **Difficulty in reaching the target audience:** Even if a survey is distributed widely, it can be likewise challenging to ensure that it reaches the intended audience. In the case of European businesses in Brazil, it was difficult to identify and contact all relevant businesses, especially whenever they were relatively small or operate in niche industries. Some relevant companies' contributions from specific origins (e.g., Poland, Hungary) are missing from this exercise, despite the KEs' efforts, including the participation in in-person events to broadcast the Survey<sup>25</sup>.

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<sup>25</sup> Including the "Poland-Brazil Business Opportunity Conference" hosted by the [Polish Investment and Trade Agency \(PAIH\)](#) and the state of Rio Grande do Sul.

- **Lack of knowledge among participants:** Another anticipated limitation of Surveys is that they rely on participants having a certain level of knowledge about the topics being surveyed. In the case of European businesses in Brazil, many participants appeared not to be familiar with several key concepts relevant to their operations, including beneficial regulations, exemptions, special regimes, and other available instruments. As discussed below, some interviewed Respondents were resigned with impairing issues they face in the country and even unaware of potential solutions to hindrances proposed by others – which is quite natural and expected among foreigners not necessarily familiar with the Brazilian context. This led to some incomplete or inaccurate responses, which in turn, made it difficult to draw meaningful conclusions from the data.
- **Lack of knowledge about the impact on their businesses:** Finally, even if participants are knowledgeable about the relevant topics, they may not have a clear understanding of how those topics impact their businesses. For example, a European business operating in Brazil may be aware of specific regulations but may not know how those factors are affecting its profitability. This can add difficulty to meaningful insights from the Survey data.
- **Time Constraints:** Because of the time constraints, only one-fifth of the individual interviews to dive into the Respondents' contributions were conducted. Nevertheless, further communications with the companies that volunteered should be encouraged in the implementation phase.

## 5. Engagement Strategies

Some of the best strategies for creating engagement included, based on the KEs' Experience:

- DELBRA and the KEs designed the Survey using clear, concise, and unbiased language. The sequence alternated easily with more complex questions.
- Incentives for completing the Survey, i.e., the KEs suggested access to Eurocâmaras's exclusive content of the final report, as well as making part of the vital movement of policymaking.
- Overall, the KEs tried creating engagement for the Survey, making it interesting, relevant, and valuable to the participants. By doing so, the KEs intended to increase the chances of getting high-quality responses and valuable insights from the Survey and future activities.

The KEs followed up with participants and the Bilateral Chambers to remind them of the Survey and encouraged them to complete it. This was done through email, social media,

and other channels by the KEs, DELBRA, the EU-Brazil Dialogues Support Facility, the Bilateral Chambers themselves, and a few Member-States' export and investment promotion agencies.

## Annex B. The Survey Transcript

The Survey could be found on the following [link](#) and was fully transcribed below:

### **SURVEY TO THE EUROPEAN BUSINESSES**

Would you like to participate in identifying strategic actions that can promote the development of the European businesses in Brazil by lending us less than 10 minutes of your valuable time?

The EU Delegation in Brazil and Eurocâmaras seek to identify the main areas of interest for the European companies in Brazil to determine key initiatives to move forward and be more assertive in defending the European companies' interests before leading stakeholders in the country.

The information provided will not be shared with third parties or used for commercial purposes. It will be handled exclusively by the KEs involved in the research to support the actions of the Delegation of the European Union to Brazil.

Please send your responses by March 31, 2023 (Friday).

Tip: Easily change the language of the Survey using the button above the title.

#### **Consent to Data Processing [mandatory]**

You are invited to participate in the Survey for the action "Promote dialogue with EUROCAMARAS to improve the interests of European industry in Brazil (TRAD002/22)". By proceeding with the form submission, you consent to the collection and processing of your data exclusively for the purpose above. Protecting your personal data and privacy is of great importance to the European External Action Service (EEAS) and the Delegation of the European Union to Brazil. Data collection and usage conform to privacy requirements outlined in our Privacy Statement, accessible via the link below:

<https://drive.google.com/file/d/1k5pfW7TEyanC00-91uNnXGwpfiKKHjFz/view?usp=sharing>

Please indicate your willingness to proceed by selecting 'Agree' or 'Disagree'. Your participation in this Survey implies consent for the collection and processing of your data for this specific purpose.

- ☐ Agree
- ☐ Disagree



1. We would like to get to know you better and understand your presence in Brazil. This section asks a few questions to learn more about your organisation's profile.



2. Your group's headquarters country (company's origin) [mandatory]:

- |   |                                      |
|---|--------------------------------------|
| <input type="checkbox"/> Austria            | <input type="checkbox"/> Italy       |
| <input type="checkbox"/> Belgium            | <input type="checkbox"/> Latvia      |
| <input type="checkbox"/> Bulgaria           | <input type="checkbox"/> Lithuania   |
| <input type="checkbox"/> Croatia            | <input type="checkbox"/> Luxembourg  |
| <input type="checkbox"/> Republic of Cyprus | <input type="checkbox"/> Malta       |
| <input type="checkbox"/> Czech Republic     | <input type="checkbox"/> Netherlands |
| <input type="checkbox"/> Denmark            | <input type="checkbox"/> Poland      |
| <input type="checkbox"/> Estonia            | <input type="checkbox"/> Portugal    |
| <input type="checkbox"/> Finland            | <input type="checkbox"/> Romania     |
| <input type="checkbox"/> France             | <input type="checkbox"/> Slovakia    |
| <input type="checkbox"/> Germany            | <input type="checkbox"/> Slovenia    |
| <input type="checkbox"/> Greece             | <input type="checkbox"/> Spain       |
| <input type="checkbox"/> Hungary            | <input type="checkbox"/> Sweden      |
| <input type="checkbox"/> Ireland            | <input type="checkbox"/> Brazil      |

3. In what segment(s) is your company dedicated in Brazil? [mandatory]\*  
Please indicate all that apply.

Note: Most relevant segments of European investment in Brazil according to the United Nations Economic and Social Affairs (UNESA) Industry Classification (ISIC)'s terminology.

- ☐ Agriculture, forestry, and fishing (ISIC 01)
- ☐ Automotive industry (ISIC 29)
- ☐ Business services (ISIC 74)
- ☐ Chemicals and plastics (ISIC 20)
- ☐ Construction (ISIC 41)
- ☐ Consulting services (ISIC 74)
- ☐ Education (ISIC 85)
- ☐ Energy and utilities (ISIC 35)
- ☐ Engineering and technical services (ISIC 71)
- ☐ Environmental technology (ISIC 38)
- ☐ Financial and insurance activities (ISIC 64 and 65)
- ☐ Food and beverage industry (ISIC 10)
- ☐ Healthcare and medical services (ISIC 85)
- ☐ Information and communication technology (ISIC 58)
- ☐ Legal services (ISIC 69)
- ☐ Logistics and supply chain management (ISIC 52)
- ☐ Manufacturing of machinery and equipment (ISIC 36)
- ☐ Marketing and advertising (ISIC 73)
- ☐ Media and entertainment (ISIC 59)
- ☐ Mining (ISIC 08)
- ☐ Paper and printing (ISIC 17)
- ☐ Pharmaceuticals and biotechnology (ISIC 26)
- ☐ Professional, scientific, and technical activities (ISIC 69)
- ☐ Public relations and communication (ISIC 73)
- ☐ Real estate activities (ISIC 68)
- ☐ Telecommunications (ISIC 61)
- ☐ Textile, clothing, and footwear (ISIC 13)
- ☐ Tourism and hospitality (ISIC 55)
- ☐ Transportation and storage (ISIC 49 and 52)
- ☐ Wholesale and retail trade (ISIC 45 and 46)

4. Number of Employees:

- ☐ Up to 19
- ☐ 20-99
- ☐ 100-499
- ☐ >500

## SECTION 2 [6 minutes]

In this section, we are trying to understand what is critical for your operation in Brazil.



5. Regarding the theme International Trade, Foreign Investment, and Economic Policies [mandatory]

Please indicate which of the following issues can impact more your organisation's operation in Brazil:

Please select at most 3 options.

- ☐ Trade Barriers (tariffs and/or non-tariff regulatory obstacles)
- ☐ Customs and Trade Facilitation
- ☐ Investment facilitation
- ☐ Public Procurement
- ☐ The EU-Mercosur Agreement
- ☐ Other
- ☐ None

6. Regarding the theme Enabling Business Environment [mandatory]:

Please indicate which of the following issues can impact more your organisation's operation in Brazil:

- ☐ Bureaucracy Reduction and More Transparency
- ☐ Environmental Regulations and Practice
- ☐ Improved Anti-Corruption Policies and Practices
- ☐ Improved Competition Policy
- ☐ Improved Protection of Intellectual Property Rights
- ☐ Improved Regulation and Practice (including Technical or Sanitary requirements)
- ☐ Labour Issues
- ☐ Tax Issues
- ☐ Other
- ☐ None

7. Regarding the theme Digital Economy [mandatory]:

Please indicate which of the following issues can impact more your organisation's operation in Brazil:

Please select at most 3 options.

- ☐ Advanced Technologies for Industries
- ☐ Artificial Intelligence and Big Data
- ☐ Blockchain and Internet of Things
- ☐ Cybersecurity
- ☐ Data Protection
- ☐ E-Commerce
- ☐ High-performance computing and quantum computing
- ☐ None

8. Regarding the theme Climate, Environment, and Sustainability [mandatory]:

- ☐ Please indicate which of the following issues can impact more your organisation's operation in Brazil:
- ☐ Please select at most 3 options.
- ☐ Bioeconomy
- ☐ Circular Economy
- ☐ Climate change and GHG Emissions
- ☐ Energy Efficiency
- ☐ Sustainable Value Chains
- ☐ None

9. In your view, how can the EU Delegation in Brazil support your organisation in your priorities?

- ☐ Advocacy with Brazilian and European authorities
- ☐ Providing specialised information on regulations, policies, and negotiations
- ☐ Support in the organisation of visibility actions, such as conferences, seminars, and publications
- ☐ Supporting the drafting of position papers on behalf of the European businesses
- ☐ Monitoring and interpreting changes in relevant Brazilian regulations
- ☐ Other

10. Did you invest in Brazil in the past 5 years?

- ☐ Yes – an Expansion Investment
- ☐ Yes – Green Field
- ☐ No.

11. Specify the size of the Investment in the country in the Past 5 years

Note: Eurostat, the statistical office of the European Union, uses a standard classification system to measure the size of an investment made by a company. This classification system is called the European Classification of Size Standards (ECSS) and follows the parameters below:

- ☐ Less than €500k
- ☐ Between €500k - €3M
- ☐ Between €3M - €20M
- ☐ More than €20M

## SECTION 3 [2 minutes]

You are almost done! This is the contact section of our Survey. We ask for your information to help us stay in touch and keep you updated on this inquiry's results and our findings.



12. Are you available for an additional short interview? [mandatory]

- ☐ Yes
- ☐ No

13. Please indicate the preferred form of contact [Phone, WhatsApp, E-mail, Video Call, LinkedIn Profile].

Example: Phone - (XX-XX) XXXX-XXXX

Enter your answer.



## FINAL SECTION

The questions below will help us create the European profile of the Responding firms. They are voluntary but will be of great value to the Project, so your input will be greatly appreciated.



14. Organization's legal name in Brazil:  
Enter your answer.

15. Your name:  
Enter your answer.

16. Your position within your organisation:

- ☐ President and Vice President
- ☐ Executive / General Director
- ☐ Department Director
- ☐ Manager
- ☐ Supervisor
- ☐ Operator
- ☐ Other

17. In which of the Brazilian regions does your company have business activities?

- ☐ Central-West
- ☐ North
- ☐ Northeast
- ☐ South
- ☐ Southeast
- ☐ Our operations are in the entire country.

18. Are you a member of any Chamber of Commerce? If so, please indicate which.  
Enter your answer.

19. Your corporate e-mail address and/or contact number:  
Enter your answer.

You have made it! Your answers have been forwarded.

Thank you very much for collaborating with this Survey!

If you have any comments or questions, please feel free to reach out to [carolina.ures@sideraconsult.com](mailto:carolina.ures@sideraconsult.com) or [diego.ures@sideraconsult.com](mailto:diego.ures@sideraconsult.com).



## Annex C. Bilateral Chambers' Info

### 1. Bilateral Chambers' Official Websites

Please note that not all EU members have bilateral chambers of commerce in Brazil, but many of them do. It is also worth noting that some non-EU countries may have bilateral chambers of commerce in Brazil as well.

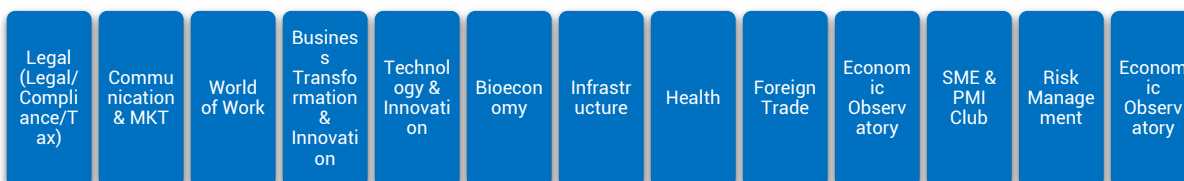
The most prominent European Bilateral Chambers of Commerce' official websites in Brazil are:

- Belgian-Luxembourgian-Brazilian Chamber of Commerce (<https://www.beluxchambres.org.br/>)
- British Chamber of Commerce and Industry in Brazil (<https://britishchamber.com.br/>)
- Czech-Brazilian Chamber of Commerce (<https://www.camaratcc.com.br/>)
- Danish-Brazilian Chamber of Commerce (<https://www.dancham.com.br/>)
- Dutch-Brazilian Chamber of Commerce (<https://www.dutcham.com.br/>)
- Finnish-Brazilian Chamber of Commerce (<https://www.finncham.com.br/>)
- French-Brazilian Chamber of Commerce and Industry (<https://www.ccfb.com.br/>)
- German-Brazilian Chamber of Commerce and Industry (<https://www.ahkbrasil.com/>)
- Hungarian-Brazilian Chamber of Commerce and Industry (<https://www.hbkik.hu/>)
- Italian-Brazilian Chamber of Commerce (<https://www.camitbra.com.br/>)
- Norwegian-Brazilian Chamber of Commerce (<https://nbcc.com.br/>)
- Polish-Brazilian Chamber of Commerce (<https://pbcc.com.br/>)
- Portuguese-Brazilian Chamber of Commerce and Industry (<https://ccilb.com.br/>)
- Spanish-Brazilian Chamber of Commerce (<https://www.camescom.com.br/>)
- Swedish-Brazilian Chamber of Commerce (<http://swedcham.com.br/>)

### 2. Bilateral Chambers' Existing Committees

A crucial aspect to consider is the pre-existing Committees within each Chamber, as they may demonstrate a particular affinity towards specific topics based on the interests of their members. This is particularly significant because each Chamber tends to prioritise matters that hold the most relevance to its members. Therefore, it is essential to have a comprehensive understanding of the Committees already in place in order to gauge the potential alignment of specific issues with their respective members. Some of the main ones mapped out are:

## France



## Germany



## Finland



## Dutcham



## Italy



## Norway

Communications

Finance

Human Resources

Legal

Platinum/Gold

Member Forum

## Spain

Tax

Foreign Trade and Logistics

Communications and Marketing

Energy and Infrastructure

Human Resources Management

Legal

SMEs and Innovation

Sustainability

## Sweden

Legal and Business

Human Capital

Finance

Innovation & Sustainability

Communication and Marketing

### 3. Bilateral Chambers' Services

In order to propose the scope within Eurocâmaras, one has to see the efforts already implemented by the Bilateral Chambers through the services offered, accordingly to Available Information on their websites:

#### Câmara de Comércio Italiana de São Paulo - ITALCAM

Events (Trade Missions & Fairs, Conferences, and Seminars)

Media & Marketing (Revista Affari - Revista de Negócios, Filo Diretto - Newsletter mensal, Boletim de Oportunidades, Espaço publicitário no Portal, Pittoreca - Notícias e entrevistas, Flash Informativo - Boletim mensal)

Institutional and Trade Missions

Press offices, media relations

Support with CVs

Support in the Internationalization of Companies

Partnerships with Innovation/Research Centers

Partnership with Banca Popolare di Sondrio (BPS)

Business Contact - Identification of Potential Partners

Translation Service

Assistance service for operations of transfer of know-how, technology, joint venture, acquisitions, and mergers

Representation service for Italian companies

### **Câmara de Comércio Brasil Finlândia - FINNCHAM**

Events (Business & Social Events, Seminars, Round Tables, and Keynote Speeches)

Communication & Marketing

Lobbying (Committees, Embassy and Consulate Channels)

Market Studies (provided by selected partners)

Representation of the Associates in collective matters

Support for companies entering the Brazilian Market

B2B Matchmaking

### **Câmara de Comércio Espanhola no Brasil**

Support in Trade Shows, Exhibitions, and other Events

Promotion of Congresses

Advocacy

Translation Service

Informative Bulletin

### **Câmara de Comércio França-Brasil - CCIFB**

Networking & Events (Matchmaking and Forums)

Representation and articulation

Interlocution with French Agencies and other French Local Commerce Chambers

Annual Report

Market Studies (provided by Team France Export)

International Missions (provided by Team France Export)

### **Câmara Portuguesa**

Matchmaking B2B

Represent the interests of the Associates/Bilateral Trade

Media (Boletim Semanal, Business Magazine, and Por + Benefícios)

### **Câmara de Comércio e Indústria Brasil-Alemanha - AHK Brasilien**

Trade Shows (Representation of German Trade Shows in Brazil; and organisers of German Pavilions)

Professional Education (Courses & Workshops, support in Dual Courses)

Events (Webinars, Courses, Delegations, Business Rounds)

Matchmaking B2B

Market Studies

Customs Informational Consulting

### **SWEDCHAM Brasil**

Events and Seminars

Networking

Thematic Committees

Business Centre (CoWorking, Meeting Rooms - infrastructure)

NordicLight Magazine (Trade and Sweden Info)

Language Course (in partnership with Svea Language)

StartUp Office

### **Norwegian Brazilian Chamber of Commerce - NBCC**

[Weekly Boletim](#)

[NordicLight Magazine](#)

[Networking Dinner & Conferences](#)

### **Câmara Federal de Economia da Áustria - Advantage Áustria**

[B2Bs Matchmaking](#)

[Representation in Austria](#)

[Market Info](#)

[Trade Missions & Trade Shows \(Stands\)](#)

[Webinars, Forums, Events & Conferences](#)

[Internationalisation Assistance](#)

### **Câmara de Comércio e Indústria Belgo-luxemburguesa-brasileira - BELGALUX**

[Events \(Round Tables, Site Visits, CEO Talks\)](#)

[B2B Matchmaking](#)

[Marketing \(Promotion of companies and events in the newsletter\)](#)

[International Missions \(Assistance for companies that want to visit Trade Shows/Trade Missions\)](#)

### **Câmara de Comércio Dinamarquês-Brasileira - DANCHAM**

[To keep members informed and up to date on issues involving trade, investment, and technology Brazilian \(Review Magazine\)](#)

[Support in finding potential commercial partners](#)

[Support regarding the recruitment and job search in Brazil](#)

[Contact point media for questions concerning Brazil](#)

[Supporting the business interests of its members](#)

["To make the right business contacts gaining access to policymakers, lawyers, auditors, bankers, media and relevant governmental authorities and staying attuned to changes in the industry"](#)

### **Câmara de Comércio Eslovênia-Brasil - SLOBRAZ**

[Networking](#)

[Events, Seminars, Conferences & Presentations](#)

[B2B Matchmaking](#)

[Informative Support \(Trade & Market - Brazil/Slovenia\)](#)

[Internationalisation Assistance](#)

### **Dutch Brazilian Chamber of Commerce - DUTCHAM**

[Orange Academy \(Talent Program\)](#)

[Events](#)

[Social Activities \(Doing Good Together\)](#)

[Dutch Inspire Award \(Award for sustainable and socially responsible business conduct in Brazil\)](#)

## Annex D. Calling for the WGs' Leaders

Please find below a suggestion of a text calling for Leaders for the WGs within Eurocâmaras to be disseminated among the Bilateral Chambers' Members:

Dear Colleagues from the European Bilateral Chambers of Commerce,

Honoured to be offering its member chambers the chance to propose collaborators to act as volunteers in its Working Groups (the "WG"), Eurocâmaras informs the existence of several opportunities for leadership positions in the organisation, exclusive for its members. All of the WGs are active nationwide. Check out the available opportunities below:

- Presidency and Vice-Presidency of the "International Trade, Foreign Investment, and Economic Policies" WG;
- Presidency and Vice-Presidency of the "Enabling Business Environment" WG;
- Presidency and Vice-Presidency of the "Digital Economy" WG; and
- Presidency and Vice-Presidency of the "Climate, Environment, and Sustainability" WG;

It is essential that the nominees come from the Member Chambers themselves and that they be specialists in each WG theme, with a broad vision to conduct the activities in such a way as to meet the interests of Eurocâmaras's diverse membership.

The chosen candidates will be co-responsible for the coordination and conduct of the WG meetings (closed and exclusive to members), the proposed events with relevant authorities, seminars/webinars, as well as, when applicable, for the organisation of publications and digital and physical technical bulletins.

Exceptionally, the term of office will run until [March 2025], when the term of the current Eurocâmaras's management also ends and may be renewed.

It is imperative that the candidates have an inclusive and fulfilling profile, which makes a sizeable difference in the leadership of the WGs within Eurocâmaras.

Please send your nominations by [May 31, 2023] to Mr. / Mrs XXX, accompanied by the candidates' CVs.

There will be a selection and a possible interview with the relevant European Delegate and the Eurocâmaras's president.

This is a splendid opportunity for participation and leadership in the groups responsible for creating most of the events and content delivered by Eurocâmaras to the European businesses in Brazil.

Sincerely,