

# **Brazil and EU digital economies: recent developments**

**A report by Cullen International**



**Prepared as a contribution to**



*Brussels, November 2014*

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*EUBrasil, a non profit organisation supporting the development of business, political and cultural links between the European Union (EU) and Brazil, has its continued efforts in the promotion of bilateral dialogue on ICT.*

*Bilateral dialogue and cooperation on ICT has progressed steadily since September 2010, when the first EUBrasil meeting was organized in Brussels. The Brazilian broadband plan was approved that same year, as was the EU Digital Agenda, setting the ICT goals for Europe until 2020.*

*This report, prepared by Cullen International, provides an overview and an update on the status of the ICT policy agendas and current regulatory debate in Brazil and in the EU.*

*Brussels, October 2014*

# **Brazil and EU digital economies: recent developments**

*(prepared by Elena Scaramuzzi - Cullen International)*

## **Overview: Brazil and Europe**

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- Increased broadband coverage and penetration
- New PNBL under preparation
- Telecommunications infrastructure performance during the 2014 FIFA World Cup
- Fiscal policies
- Spectrum for wireless broadband
- Review of concession contracts and of universal service obligations
- 'Marco 'Marco Civil' for the Internet
- Internet governance

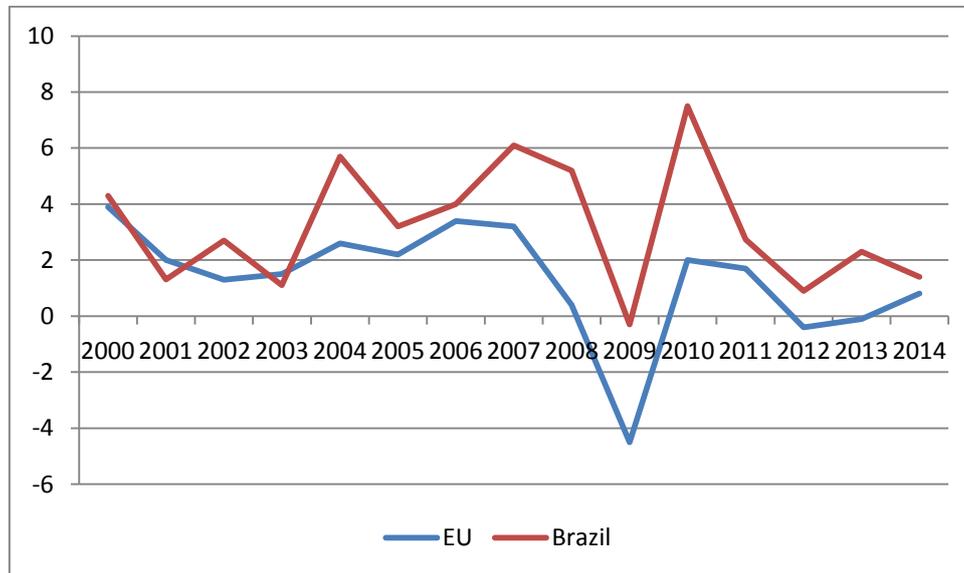
### **Recent ICT developments in Europe**

- Digital Agenda for Europe: targets and results
- Investment in NGA: Directive on reducing the costs to deploy high speed broadband networks
- Proposal on the Telecom Single Market: an update
- 2014 Recommendation on relevant markets
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# Overview: Brazil and Europe

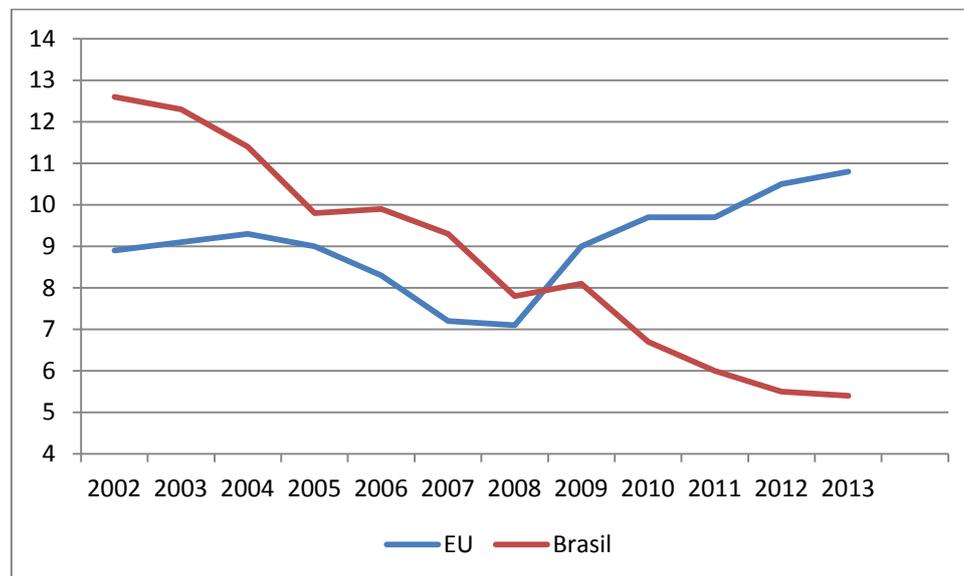
Brazilian and EU economies have both been experiencing modest growth trends. After a peak of almost 8% growth in 2010, Brazil has shown lower growth trends in 2011, 2012 and 2013. The Brazilian economy is however still growing on average, at higher rates than the EU economy.

*GDP annual growth at market prices (sources: Eurostat and IBGE)*



Higher growth patterns in the Brazilian economy are also shown in terms of unemployment, as shown in the figure below. In both EU and Brazil youth unemployment approximately doubles the respective average unemployment rate.

*Unemployment trends in Brazil and in the EU (sources: Eurostat and IBGE)*



The information and communications technology sector represents a relevant component of GDP, both in Brazil and in Europe.

Over the last few years, the European telecoms market has been showing signs of maturity. According to statistics published by the European Commission in June 2014, revenues in the Electronic communications sector amounted to € 323.6bn in 2012 against 334.7bn in 2011 (-3.3% in

2012). This decline contrasts with the trends in other parts of the world, showing a global growth of 4.2%. Capital expenditure (CAPEX) in 2012 and was estimated at €42.1bn and grew on average by 1.4% compared to the previous year, showing with significant variations across countries<sup>1</sup>.

Over the last few years, the Brazilian telecommunications market has been growing steadily. Gross revenues reached BRL 136.4bn (€43bn) in 2013. The annual increase in revenues was of almost 4.4% in 2013 and 5.3% in 2012, and represent approximately 4.7% of the Brazilian GDP. Total investment in fixed and mobile communications continues to increase, as it reached BRL 26.5bn (€8.4bn), from BRL 25.3bn (€8bn). Total investment increased by 4.9% in 2013 and by a remarkable 11.5% in 2012. Total investment represented 19.7% of telecommunications revenues in 2012.<sup>2</sup>

According to a recent EITO report<sup>3</sup> which monitors the whole information and communications technology (ICT) industry, Brazil is this year's fastest growing IT nation. Sales of products and services in information technology and telecommunications are expected to increase by 10.4 percent to €122 billion in 2014. In 2013, Brazil came second behind India.

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<sup>1</sup> 2014 Report on Implementation of the EU regulatory framework for electronic communications - <https://ec.europa.eu/digital-agenda/en/news/2014-report-implementation-eu-regulatory-framework-electronic-communications>

<sup>2</sup> Data sources: SindiTelebrasil <http://www.telebrasil.org.br/panorama-do-setor/consulta-a-base-de-dados>

<sup>3</sup> <http://www.eito.com/press/Press-Releases-2014/Brazil-is-the-fastest-growing-IT-nation>



# Recent developments in BRAZIL

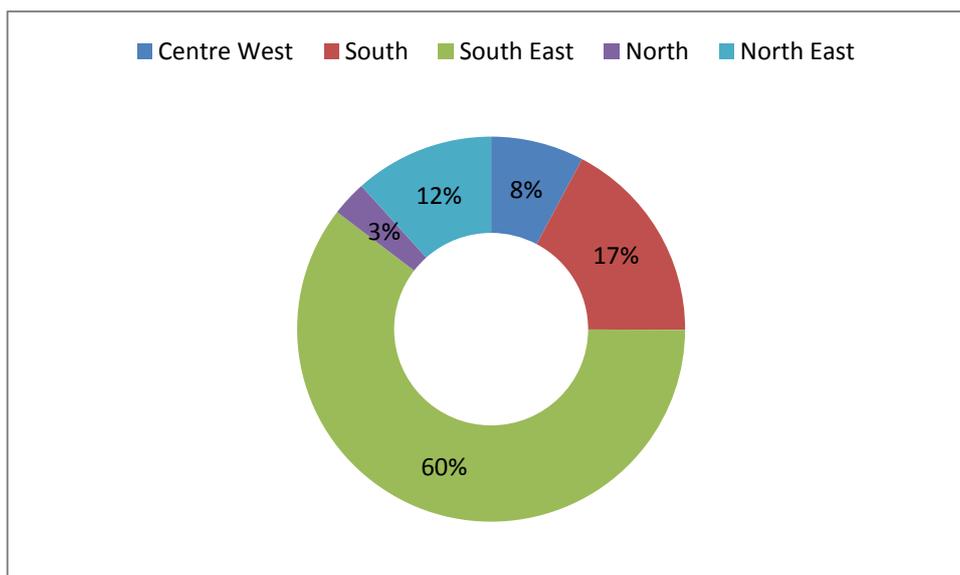
## Increased broadband coverage and penetration

According to recent statistics published by Anatel and by the Ministry of Communications, from May 2010, when the National Broadband Plan (PNBL) was launched:

- fixed broadband subscribers grew by 79.1%, from 13.1m to 23.46m, reaching a density of 35.8 every 100 households in August 2014;
- wireless broadband coverage has reached 3,406 Brazilian municipalities, or 61.2% of all municipalities, versus 15.3 % in May 2010; and
- wireless broadband subscribers reached 123.6m in mid-2014 versus 13.4m in May 2010.

Although regional gaps have decreased, with above average growth observed in the less developed regions, notably North and North-Eastern states, broadband subscribers remain largely concentrated in the most populated and economically developed states of Brazil.

*Fixed broadband subscribers – August 2014 (source: Anatel)*



The mandated offer of low cost broadband packages ('banda larga popular') is one of the milestones of the national broadband plan. Fixed concession holders committed to offer these plans under a formal agreement signed with the Communications Ministry and Anatel in 2011.

Telecommunications operators have been offering since then 1 Mbps fixed broadband access at BRL 35 (€11), including taxes. These low cost packages were available in March 2014 in 4.633 Brazilian municipalities (83% of total municipalities) and subscribed by 11% of all fixed broadband households<sup>4</sup>.

Fixed concession holders are also offering free collective 1 Mbps access to 100% of public schools in urban areas (96% in rural areas). Free access (terrestrial or satellite) has been implemented at rural telecentres, health centres, indigenous communities within the GESAC programme. From 2013, the Ministry has established a target to triple collective points of presence from 13,379 to 29,000, offering connection at 1 Mbps speed.

<sup>4</sup> Sources: Ministry of Communications <http://comunicacoes.gov.br/programa-nacional-de-banda-larga-pnbl>  
Anatel <http://www.anatel.gov.br/Portal/exibirPortalInternet.do>

Under the PNBL 2010-2014 state owned company Telebrás has been deploying a backbone network which should cover 30,804 km by end 2014. As of May 2014 the fibre backbone network reached 885 cities. Launch of a satellite by Telebrás targeting coverage of 2,000 additional cities is foreseen by 2016.

### **New Broadband Plan under preparation**

The Ministry of Communications is working on a new national broadband plan (PNBL) to be launched after the presidential elections.

The new PNBL builds upon the 2010 plan's objectives including new broadband penetration targets and a number of measures to foster broadband demand and infrastructure deployments until 2018. No details have officially been disclosed, but according to press reports the government would be evaluating the possibility to partly subsidise fibre network deployments to bring fibre to all cities with over 100,000 inhabitants.

### **Telecommunications infrastructure performance during the 2014 FIFA World Cup**

Overall, the government spent BRL 428m (€135.5m) in telecommunications infrastructure investment for the FIFA World Cup. Telebrás's 15,000 km fiber optic network was designed to allow 30 Gbps data transmission per stadium. Data volumes over the Telebras's network exceeded 166 terabytes and ensured 517 audio and video transmissions during the matches. Total investment from operators to ensure internet and voice services in stadiums amounted to BRL 1.3bn (€411m). Mobile network operators deployed 10,000 km fibre optic networks and installed 3,700 3G and 4G antennas and over 1,000 WiFi antennas to ensure coverage in the 12 soccer stadiums used for the matches<sup>5</sup>.

### **Fiscal policies**

Taxation of telecommunications services remains on the most controversial issues in Brazil. The government has however implemented fiscal policies favouring ICT investment and broadband take up. In total it provided BRL 6.1bn (€1.9bn) in fiscal incentives, including for broadband network deployments and purchase of smart phones.

Special tax exemptions have been introduced to incentivise broadband network deployments in rural areas (REPBNL), to foster machine to machine (M2M) services, and on the retail purchase of smart phones.

The Ministry of Communications approved in 2014 approved 50 projects (out of over 1,000 proposals received) for an estimated total infrastructure investment of BRL 2.2bn (€ 697m) under the REPBNL. Under this special tax regime, applicable until end of 2016, fiscal incentives are granted to infrastructure investment projects to acquire equipment and network components produced nationally, and also for investment deployments in the least developed regions of Brazil.

The government recently decided to extend the deadline for the submission of broadband infrastructure project proposals until June 2015.

### **Spectrum for wireless broadband**

Brazil is implementing a strategy aiming to fast wireless broadband rollout. In June 2012 Anatel awarded spectrum in the 2.5 GHz and 450 MHz bands.

All the 2.5 GHz paired spectrum offered was awarded to the four largest mobile network operators, Vivo, Claro, TIM and Oi.

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<sup>5</sup> Source: Ministry of Communications

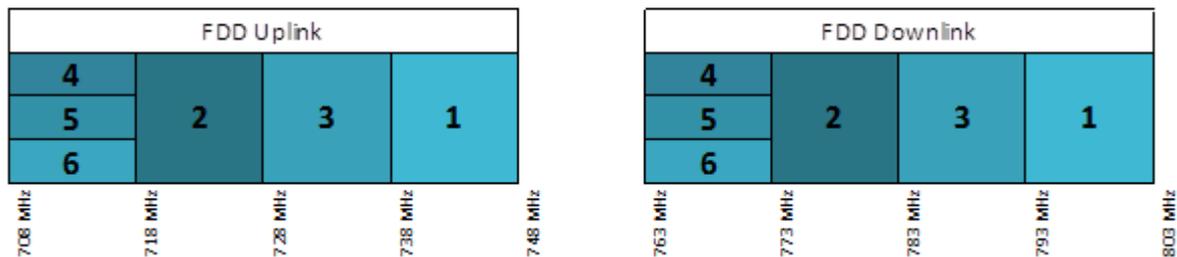
These operators had to ensure 4G coverage in the cities hosting FIFA world cup by December 2013, and by December 2017 in cities with more than 30,000 inhabitants. The four operators are also subject to coverage obligations and to minimum data service quality requirements in rural areas of Brazil.

In September 2014 Anatel closed a tender to assign 2x30 MHz of nationwide and 2x30 MHz of regional spectrum in the 700 MHz band for wireless 4G services.

Vivo, Claro and TIM were each awarded a 2x10 MHz spectrum licence with national scope. Regional operator CTBC was awarded a regional licence to offer LTE services in the four states where the company operates. The two other regional licences of 2x10 MHz each received no offers and remained unsold.

Auction lots structure (Source: Anatel)

1st round: lots of 2x10 MHz (spectrum cap of 20 MHz)



The price paid for the four licences amounting to BRL 5.85bn (€1.88bn) is very close to reserve prices set by Anatel. No new entrant or other MNOs already operating in Brazil expressed an interest to participate in the auction.

The obligations imposed on 700 MHz spectrum licensees, including bearing the costs to eliminate interference with digital TV services in the band and to redistribute analogue TV channels and transmitters probably represented a concern for several players. Another significant constraint were the restrictions imposed on the use of spectrum – only 12 months after the analogue switch off in each city, in accordance with the switch off schedule published by the Ministry of Communications. The complete analogue switch off in Brazil is foreseen by end 2018.

### Review of concession contracts and universal service obligations

In Brazil five fixed telephony operators - including local operators Telefónica, Oi, CTBC and Sercomtel and long distance incumbent operator Embratel - are still using concessions contracts to offer fixed telephony services. As opposed to services offered under individual authorisations, telephony services offered under a concession are considered a 'public service' in the respective concession areas, and are subject to special obligations on retail tariffs and universal service provision.

Concessions and universal service obligations (PGMU) are reviewed every five years, and are currently under review at Anatel. The revised contracts and PGMU will be in force from January 2016 until December 2020.

As regards the PGMU Anatel is proposing to lift some of the current telephony service obligations, and to add new obligations regarding backhaul provision. Anatel proposes backhaul connections must be provided by concession holders via fiber optics links in all municipalities not yet covered in their respective concession region (this involved in total approx. 2,900 municipalities of Brazil).

### 'Marco Civil' for the Internet

Upon the sanctioning of President Rousseff on April 23, 2014, the internet law (better known as the 'Marco Civil') entered into force.

The so called ‘Marco Civil’ law, presented by the government in 2011 covers fundamental rights and obligations related to the internet. In addition to civil rights and freedom of speech, it gives indications on how data protection and net neutrality will be addressed in Brazil. Implementation will be carried out through by-laws.

The main rights and obligations laid out by the law are summarised in the table below.

*Main rights and obligations included in the ‘marco civil’ law*

Net neutrality	<ul style="list-style-type: none"> <li>• No discrimination or degradation of traffic</li> <li>• No blocking of specific applications, filtering, or deep packet inspection</li> </ul>
Privacy	<ul style="list-style-type: none"> <li>• Right of internet users to privacy of internet communications, except in case of a judicial order authorising interception</li> <li>• Obligation of internet service providers not to give third party access to their registry of end users’ connections and applications, unless the end users have given their explicit consent</li> </ul>
Data retention	<ul style="list-style-type: none"> <li>• Internet access providers to store data for a period of 12 months</li> <li>• Application providers must store data for a period of six months</li> </ul>
ISP liability for third party content	<ul style="list-style-type: none"> <li>• ISPs are responsible for (civil law) damages due to third party content only as a result of a specific judicial order.</li> </ul>

## Internet governance

The Marco Civil was approved just before the launch of NETMundial, a multi-stakeholder summit on internet governance, taking place in São Paulo on April 23 and 24, 2014. NETMundial was attended by over 1,200 of representatives from governments, industry, academia and civil society organizations from 97 countries. 77 countries sent ministerial representatives to the event.

At closing, NETmundial approved by general consensus a multi-stakeholder, non binding statement setting general principles and recommendations on the future of internet governance, to “*feed into other processes and forums*”. The statement also sets September 2015 (at the UN’s Internet Governance Forum (IGF) hosted by Brazil) as the deadline to conclude the transition towards a new internet governance model. Net neutrality was also included among the issues deserving further discussion beyond NETmundial<sup>6</sup>.

<sup>6</sup> <http://netmundial.br/wp-content/uploads/2014/04/NETmundial-Multistakeholder-Document.pdf>



# Recent developments in the EU

## Digital Agenda: targets and results

The European Commission has set broadband targets for Europe to be achieved by 2020. By then all Europeans should have access to the internet at speeds above 30 Mbps, and 50% of European households should have a subscription above 100 Mbps.

Achieving these goals - which are however not binding on member states - will require substantial investment. The Commission estimates that some €60bn will be required to achieve the target of 30 Mbps for all Europeans by 2020, rising to €180bn - €250bn to achieve the target of 100 Mbps subscriptions for 50% of European households by 2020.

Several member states have also set national goals for broadband development, often differentiating between traditional and next generation access (NGA) broadband. Most countries have set such targets as policy goals. A few EU member states have included broadband under the scope of universal service.

According to statistics published by the European Commission<sup>7</sup>, basic broadband coverage is now 100%, and is ensured via different technologies (fixed, wireless, mobile and satellite).

Average broadband penetration in the EU has increased from January 2004 to January 2014, from 4.9% to 30% of population. Broadband take-up has been fostered by falling prices and higher speed offers, thanks to increased competitive pressure.

High speed broadband penetration is still low, but in many Member States is growing rapidly.

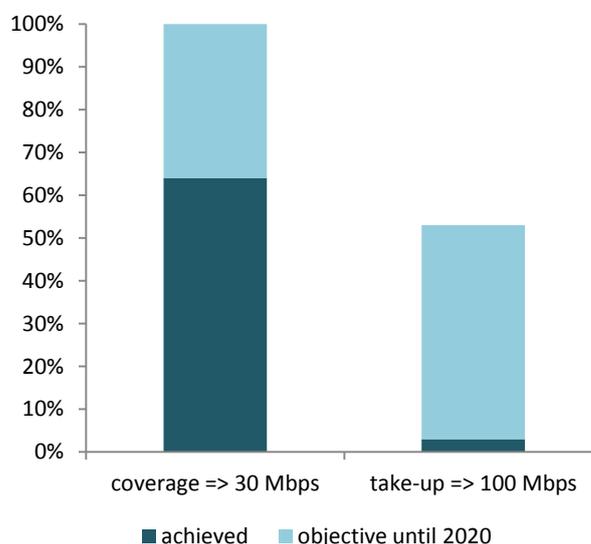
Fast broadband technologies capable of providing at least 30 Mbps are available to 64% of the EU population, up from 54% a year ago, and 29% in 2010. Among the Next

Generation Access technologies Docsis 3.0 for cable has the highest coverage (42%) followed by VDSL (32%) and FTTP (15%).

Next Generation Access lines account for 26% of all fixed broadband lines as opposed to 20.3% a year ago and 12.2% as of January 2012.

The current status of achievement of the 2020 fast broadband targets, as an EU average, is shown in the figure below. NGA coverage and take-up vary significantly across EU member states. The best performing Member States are Malta, the Netherlands, Belgium and Luxembourg having more than 90% of homes covered. On the other hand, Italy, Croatia and Greece are lagging behind in fast broadband deployment.

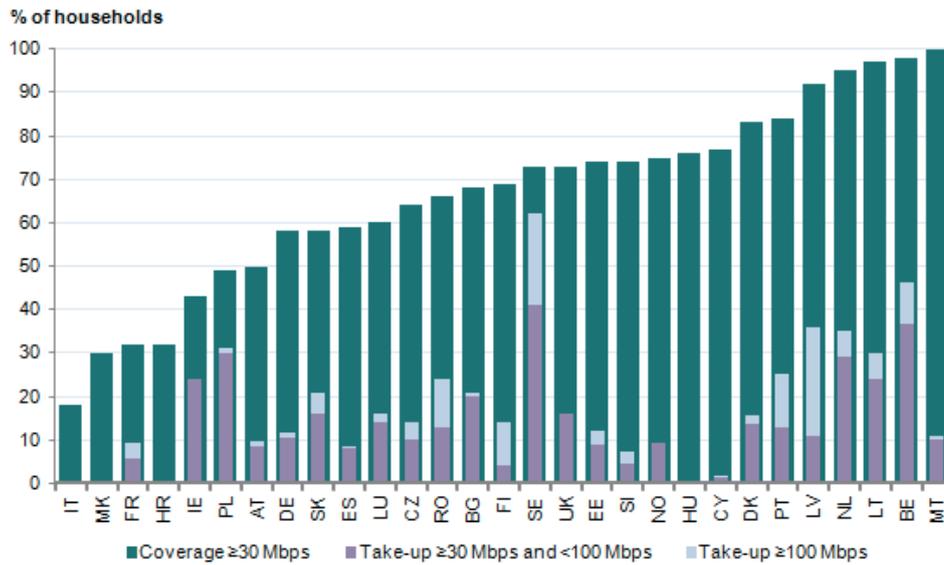
*Fast broadband coverage and take up (Digital Agenda Scoreboard 2014)*



Mobile broadband subscriptions are increasing. At end 2013 4G coverage was still substantially below that of 3G (HSPA). LTE deployments have focused so far on urban areas except for Sweden, Estonia, Germany, Luxembourg and Slovenia. LTE has not yet been launched in Bulgaria, Cyprus and Malta.

<sup>7</sup> Digital Agenda Scoreboard 2014  
<https://ec.europa.eu/digital-agenda/en/news/2014-report-implementation-eu-regulatory-framework-electronic-communications>

Current coverage and take up of high speed broadband in % of households<sup>8</sup> (Cullen research)



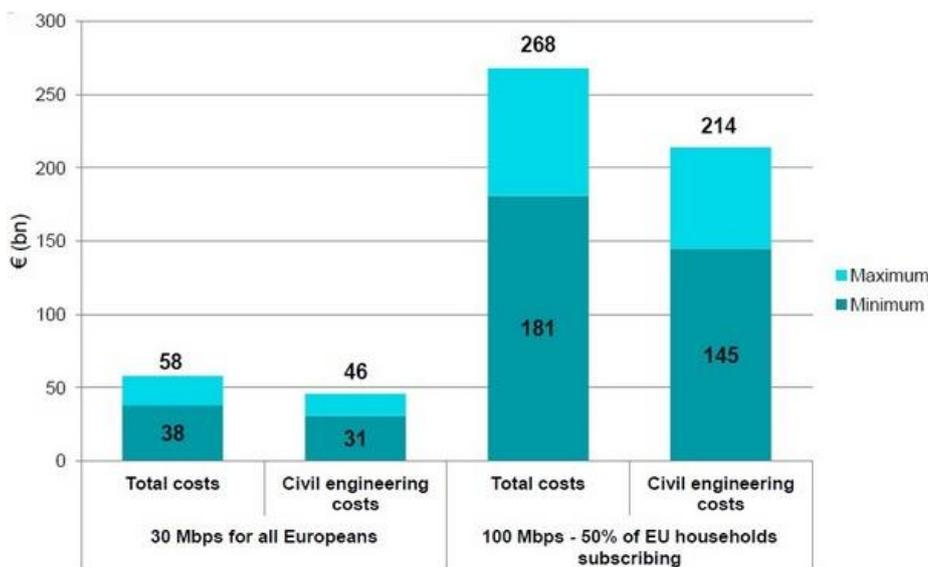
**Investment in NGA: Directive on reducing the costs to deploy high speed broadband networks adopted in May 2014**

The Commission estimates that civil engineering can account for up to 80% of the costs of deploying high-speed broadband networks.

In a draft regulation<sup>9</sup> proposed in March 2013 the Commission had put forward a number of measures which could, according to its calculation, reduce operators' capital expenditure for Next Generation Access (NGA) investments by 20-30%.

Commission estimation of the cost involved to reach Digital Agenda targets.

Source: Cullen research based on Commission impact assessment and accompanying studies



<sup>8</sup> Cullen International, European Telecoms CCA, July 2014. FI: threshold is 24 Mbps

<sup>9</sup> <http://ec.europa.eu/digital-agenda/en/news/proposal-regulation-european-parliament-and-council-measures-reduce-cost-deploying-high-speed>

However, rather than a directly binding regulation, the European Parliament and the member states agreed on a directive, which has to be transposed into member states' national laws, leaving more leeway for implementation.

The measures include:

- **Access to existing physical infrastructure:** possibility for telecoms operators to access the physical infrastructures of other network industries (e.g. electricity, water, sewage, transport) to deploy high-speed (above 30 Mbps) fixed and wireless broadband networks;
- **Permits by local authorities:** a default four-month deadline is established for local authorities to grant or refuse a permit for civil works needed to deploy high-speed broadband networks;
- **Transparency on physical infrastructure availability:** member states to make information on existing and planned infrastructures available through a single information point (SIP), accessible by telecoms operators. The function of the SIP as well as the body that rules in case of dispute has to be performed by one or more national, regional or local-level bodies. This could possibly, but not necessarily, be the telecoms NRA. Member states are free to make their own arrangements.
- **In-building infrastructure:** all new buildings - and those undergoing major renovation - for which applications for building permission have been submitted after December 31, 2016, must be equipped with “*high-speed broadband-ready*” in-building physical infrastructure, up to the network termination points. All newly-constructed multi-dwelling buildings and those that undergo major renovation to be equipped with a concentration point, located inside or outside the building, accessible to telecoms network providers.

Member states will have until January 1, 2016 to transpose the directive into national law. These national provisions have to enter into force by July 1, 2016.

## Telecoms Single Market – an update

In September 2013 the European Commission adopted a draft regulation “*Laying down measures to complete the European single market for electronic communications and to achieve a Connected Continent*”.

The objective of the proposal was to ensure a globally competitive European sector by completing the single market for telecoms, with estimated benefits in terms of EU economic growth by up to €110bn a year; over 0.8% of GDP<sup>10</sup>.

The proposed regulation included several significant changes regarding key policy issues, including on net neutrality, proposing to ban anti-competitive blocking, and an exemption to the decoupling obligation on international mobile roaming providers. It also proposed to give the Commission a veto on remedies imposed on operators under market analysis procedures, and Commission scrutiny of national spectrum authorisation procedures.

The European Parliament and the Council have expressed concerns about key aspects of the proposal. The European Parliament adopted a significantly amended first reading of the TSM proposal on April 3, 2014. A Council progress report, presented at the Telecoms Council of June 6, 2014, also shows that member states do not seem to agree on several key items of the TSM plan.

The proposal is still under evaluation and discussion.

## 2014 Recommendation on relevant markets

The recommendation identifies five relevant product and service markets in the electronic communications sector that are candidates for ex ante regulation in accordance with the Framework Directive. In these markets ex post competition law remedies may be insufficient to effectively address possible market failures.

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<sup>10</sup> [http://ec.europa.eu/commission\\_2010-2014/kroes/en/blog/european-council-ict-single-market](http://ec.europa.eu/commission_2010-2014/kroes/en/blog/european-council-ict-single-market)

The new recommendation was adopted on October 9, 2014. This is the third recommendation on relevant markets adopted by the European Commission. The two previous ones were respectively approved in 2003 and 2007.

The number of markets susceptible to ex ante regulation is reduced from seven in the 2007 recommendation to five:

- The markets for retail fixed telephony access and wholesale fixed call origination have been dropped from the list.
- The wholesale fixed access markets have been redefined.
- The wholesale fixed and mobile termination markets have been left unchanged.

The table below lists the main changes in the 2014 recommendation compared to the one from 2007.

2007 markets		2014 markets	
Wholesale fixed call termination	3	Wholesale fixed call termination (unchanged)	1
Wholesale mobile call termination	7	Wholesale mobile call termination (unchanged)	2
Wholesale physical network infrastructure access	4	Wholesale local access at a fixed location (WLA) (redefined)	3a
Wholesale broadband access	5	Wholesale central access for mass market products (redefined)	3b
Wholesale terminating segments of leased lines	6	Wholesale high quality access at a fixed location (redefined)	4
Retail fixed line access	1	No longer in the list	-
Wholesale fixed call origination	2	No longer in the list	-

### *Redefined broadband markets*

Rather than being defined by technology and topology (physical unbundling, bitstream, and leased lines), the new market definitions are now structured according to:

- the functionality of modes of access, rather than the technological means of deployment; and
- differences in the retail needs of consumers and SMEs, compared with corporate customers.

Cable remains unregulated, although the Commission does note the increasing relevance of cable as a possible direct and indirect constraint in wholesale broadband access markets.

## **Review of the data protection framework**

A Proposal for a regulation of the European Parliament and of the Council “on the protection of individuals with regard to the processing of personal data and on the free movement of such data” (General Data protection Regulation) was presented in January 2013.

This proposal for a general data protection regulation aims to put forward a comprehensive reform of the EU 1995 data protection rules to strengthen online privacy rights, to ease the free circulation of personal data and to improve user’s confidence online. The revision of the existing rules through a regulation (instead of a directive) would reduce the margin for manoeuvre left by the current directive to the member states by ironing out the differences in the way the directive has been implemented

The proposed regulation introduces in particular a new right of data portability, provides the conditions of the right “to be forgotten”, strengthens the rules on the accountability and responsibility of data controllers and gives more independence and powers to the national data protection authorities.

The proposal is pending of final adoption by Parliament and Council.



## ABOUT CULLEN INTERNATIONAL

Cullen International tracks, reports on and benchmarks regulation in telecommunications, media, electronic commerce, and postal services - covering developments across Europe, Latin America, the Middle East and North Africa.

For over twenty-five years, we have been providing comprehensive, neutral, unbiased, timely information that is trusted by industry and official institutions alike. We are widely recognised as the leading regulatory research provider in the field.

Our services consist of a unique range of alerts, reports, benchmarks and enquiry services, that are complemented by our training and consulting services. Our outstanding regulatory database contains over twenty years of source documents linked to expert analysis of events.

We are also regularly selected to carry out important research and studies for the European Commission and other organisations and we are frequently sought out to chair or make presentations at industry events.

### **Our clients**

Cullen International is privileged to serve over 150 key market players and public organisations - all with a serious strategic focus on telecommunications, media, e-commerce, postal and smart energy regulations.

These clients include operators, online service providers, broadcasters, equipments vendors, national regulatory authorities, competition authorities and ministries.

Strategically situated in Brussels, we are the eyes and ears on the ground for our clients, maintaining essential close links with all EU institutions, national regulatory authorities and our solid network of national regulatory experts in over thirty countries.

Cullen International maintains strict independence and does not represent the views of any of its clients.

For information about the Latin America Telecom service and the Latin America Media service, go to:

[www.cullen-international.com/latinamerica](http://www.cullen-international.com/latinamerica)

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**EUBrasil** is a non-profit-making association created with the aim of supporting the development of **fruitful business, political and cultural links between the European Union and Brazil.**

**Major EUBrasil Objectives:**

- To promote strong and harmonious bilateral dialogue between economic and political actors of Brazil and EU.
- To seek out solutions for the structural obstacles inherent to the relations between the EU and Brazil.
- To promote the economic, cultural and social cooperation.
- To support the governmental initiatives having as scope the creation of a free exchange trade zone between the EU and Mercosur.
- To develop a political communication that allows to realize the Brazilian interests in the EU and vice versa.

**Major EUBrasil Activities:**

- To create the **EUBrasil Business Round Table** around which top political and economic actors, European and Brazilian, could meet themselves and discuss.
- To analyze the evolution of the **bilateral dialogue** and to propose new measures of cooperation between the two communities during the official meetings.
- To create a strong **net of associations of professionals and experts**, European and Brazilian, concerned or interested in promoting the cooperation.
- To promote **common plans** in order to benefit of the European cooperation initiatives and particularly of those regarding the research and the development.

**EUBrasil** sets out to **enhance bilateral dialogue** between the two partners by among other measures establishing a **communication forum** bringing together all the interested stakeholders promoting **bilateral meetings** and cooperation initiatives at multi-levels.

**Membership of EUBrasil is open to:**

- Parliamentarians and elected officials
- European and Brazilian companies
- Experts, Academics and journalists.

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