A Platform for Business Development, Innovation, and Long-Term Impact Beyond COP30

EY House

Shape the future with confidence

The better the question.
The better the answer.
The better the world works.

Overview

Preface

COP30 reinforced a central point: the climate agenda only advances when ambition is translated into execution. In Belém, it became clear that the transition to a low-carbon economy is not merely an environmental commitment, but a structural driver of competitiveness, investment, and development for Brazil.

EY House was created with this purpose: to provide a convening space that brings together public policy, businesses, financial markets, communities, and scientific knowledge. A space to build viable solutions—not just to discuss challenges.

Throughout COP30, we welcomed leaders who share the conviction that sustainability is a driver of growth—and that a significant portion of the financing and innovation required will come from the private sector. We also observed that integrated initiatives, grounded in reliable data, cooperation, and a long-term vision, are critical to transforming intention into tangible results in the real economy.

This material brings together reflections, insights, and concrete pathways discussed at EY House. It represents not only a synthesis of our contribution to COP30, but also an invitation to move forward: to continue working together in building solutions that combine economic performance, social impact, and environmental preservation.

I would like to thank the COP30 Presidency, the partners who made EY House possible, and everyone who contributed to making this space a true point of convergence. We remain committed to acting as integrators of the climate transition, connecting vision, governance, and execution—in the true spirit of collaboration that defined this conference.

With highest regards,

Luiz Sergio Viera
CEO, EY Brazil

Ricardo Assumpção
EY Latam, Sustainability Leader

Introduction: The Path to Economic Resilience

The implementation of the Paris Agreement and the transition to a low-carbon, climate-resilient economy are no longer merely an environmental agenda; they have become a structural axis shaping the organization of the global economy, influencing investment patterns, production models, and competitive dynamics. How this transformation is carried out in the real economy will depend decisively on coordination among the private sector, governments, value chains, and financial markets.

In this context, EY House was conceived as a space for dialogue and solution-building focused on implementing the climate agenda, bringing together leaders from the productive sector, the public sphere, and civil society to foster reflection on concrete pathways toward sustainable development.

The space was developed in partnership with Bradesco, B3, Vale, and Grupo Votorantim, including CBA, Citrosuco, Reservas Votorantim, and Votorantim Cimentos, and included collaboration with international institutions such as MIT Sloan School of Management, the United Nations High Commissioner for Refugees (UNHCR), and AMCHAM, with support from the Government of Pará.

The initiative emerged from the recognition that EY acts as a strategic bridge between public policy, production chains, financial systems, and investment flows, contributing to transforming the climate agenda into a pathway of economic execution in the real economy.

Brazil combines territorial scale, productive diversity, and socio-environmental wealth that have no parallel globally and this uniqueness fundamentally shapes the possible pathways for climate implementation. Discussions at EY House showed that transforming this potential into a competitive advantage requires recognizing diverse regional realities and integrating innovation, local knowledge, infrastructure, and public policy to generate consistent impact. When effectively aligned, these dimensions enhance the country's competitiveness, strengthen productive inclusion, and create solutions capable of inspiring replicable models for emerging economies.

Integrating the COP30 Action Agenda Across Five EY Priority

EY House Thematic Agenda

- Agribusiness
- Financial Services
- Energy
- Mining
- Infrastructure

Week 1 | Systems Transformation – Finance, Industry and Inclusion			
Day	**EY House Theme**	**COP30 Theme**	**COP30 Goals**
10 Nov (Mon)	Infrastructure & Resilience	Adaptation and Resilience	11, 12, 13, 14, 15
11 Nov (Tue)	Mining & Circular Economy	Industry & Innovation	2, 28, 29
12 Nov (Wed)	Climate Governance	Institutions & Transparency	26, 30
13 Nov (Thu)	Finance as a driver of implementation	Finance & Markets	16, 17, 18, 19, 26, 30
14 Nov (Fri)	Energy Transition	Energy & Industry	1, 2, 3, 4
Weekend			
Week 2 | Acceleration and Innovation – Shaping the Future with Confidence			
17 Nov (Mon)	Nature, oceans and bioeconomy	Biodiversity & Biotechnology	5,6,29
18 Nov (Tue)	Technology and AI	Technology and Innovation	25,27,28
19 Nov (Wed)	Agribusiness & Just Transition	Agriculture & Food Systems	8,9.10
20 Nov (Thu)	Traditional Wisdom & Modern Pathways: The way foward	Institutions and Transparency	26, 30

EY House has established itself as a strategic platform with global reach, bringing together more than 3,000 participants, 120 events, and high-level leaders from the public sector, business, finance, academia, civil society, and Indigenous communities to transform the climate agenda into an economic agenda. Aligned with the themes and 30 action points of the COP30 Presidency's Action Agenda, the EY House program was structured to connect ambition with implementation.

By convening leaders from the energy, agribusiness, mining, infrastructure, and financial services sectors among others EY House contributed to advancing the dialogue of the COP30 Action Agenda, with a focus on economic viability and the implementation of solutions applicable to the real economy.

The space was conceived within a sustainable infrastructure as an environment for aligning public policy, capital flows, and the operational dynamics of production chains, with the aim of bringing the priorities of the climate agenda closer to concrete investment and production decisions. This EY initiative reflects the understanding that the climate transition reaches its decisive phase in implementation, when the ability to translate political signals into economic choices becomes a critical element for generating long-term sustainable value.

Sustainable, recycled, recyclable or **renewable** materials.

Water **reuse and conservation** systems.

Reuse and recycling of waste generated on site by local cooperatives.

Offsite modular construction techniques for waste reduction and speed of execution

Brazil's climate targets will depend both on the integration of the climate agenda into operational models and on capital allocation decisions across key sectors of the economy, including energy, mining, agriculture, infrastructure, and the financial system. The climate transition will be effective to the extent that these sectors internalize criteria related to resilience, low-carbon development, and climate risk management into their development strategies.

In line with the COP30 Presidency's call for contributions to the Roadmaps on transitioning away from fossil fuels and reversing deforestation by 2030, this eBook consolidates strategic inputs and sectoral experiences discussed at EY House, with a focus on barriers, enablers, and implementation pathways.

EY House Results in Numbers

General View | EY House & COP30

The EY House figures reflect its significant reach; however, it is important to emphasize that the true value lies in how the discussions connected sectors through interdependent value chains—the space where implementation truly scales.

3.067
People who have passed through the House and attended our events (total).

2 ministers and 5 governors
and several mayors and authorities.

100 CEOs

90
Events on average (considering Cumaru Auditorium, Votorantim Auditorium and Restaurant) **Agenda - COP30 - EY House Meeting.**

200
companies of 33 nationalities.

+30
companies listed on stock exchanges in Brazil.












Agribusiness

Agribusiness was discussed in the EY House panels based on the premise that sustainability and productivity are not opposing agendas, but rather complementary components of Brazilian agricultural competitiveness. The agro-environmental agenda was presented as one of the main pillars of Brazil's positioning in the global low-carbon economy.

The discussions highlighted that the expansion of agricultural production should primarily occur through increased productivity and efficiency of production systems, avoiding the expansion of activities into new areas. In this context, sustainable soil management practices, carbon sequestration, and integrated production systems such as the combination of crops, livestock, and forestry were identified as relevant instruments for biodiversity conservation and for strengthening the climate resilience of rural activities.

Production traceability was identified as a strategic element for accessing higher value-added international markets. The use of geospatial monitoring, independent audits, and distributed digital record technologies contributes to increasing transparency in production chains and ensuring the socio-environmental origin of agricultural commodities. Traceability is not merely about compliance: it is the language of trust in global value chains, protecting market access, rewarding efficiency, and reducing asymmetries among producers.

The discussions also emphasized the need to reduce technological asymmetry among rural producers. Unequal access to precision agriculture technologies, soil management tools, and climate information can influence production decisions and encourage the expansion of cultivable land as an economic alternative. In this regard, technological capacity-building initiatives and productive inclusion were considered essential for the sector's sustainability.

The Amazon socio-bioeconomy was discussed as an opportunity to develop forest-based value chains, incorporating scientific knowledge, traditional know-how, and value addition to natural-origin products. Projects focused on transforming forest raw materials into higher value-added goods were mentioned as examples of building an economy associated with environmental conservation.

The role of the consumer was also recognized as part of the transformation dynamics of industrial value chains, through consumption choices capable of encouraging sustainable production practices and strengthening markets for responsibly sourced products.

In summary, Brazil's agro-environmental competitiveness will be defined by its ability to coordinate sustainable practices across complex value chains that connect producers, industries, global markets, and local communities, always aligned with consumer trends.

For COP30, EY conducted the Impact Edge study to assess and measure the impacts of sustainability in Brazil's agribusiness sector. The analysis indicates that the consistent adoption of environmental, social, and governance (ESG) practices can boost the sector by up to 26.5%, generating R$247 billion in the country's economy clear evidence that the agenda is shifting from a cost to a driver of value.

Impact **Edge**

Sustainable Agriculture

26,5% growth
of the sector per year.

328.6 $MtCO_2$/year
in emissions avoided.

R$ 247 billion
activated in the economy.

2.1 million
jobs generated.

11.5 trillion
liters of water saved.

2.8 TWh
of energy saved.

R$ 112 billion
in tax revenue.

1,080 hospitalizations
avoided annually.

Energy

In the EY House panels, energy was discussed as a structural element of the economy, cutting across sectors such as industry, mobility, digital infrastructure, and macroeconomic stability. The energy transition was addressed as a process that combines decarbonization, economic competitiveness, and climate risk management.

Within the discussions, the energy sector was presented as one of the main drivers of decarbonization in the Brazilian economy, supporting the electrification of society more broadly, replacing fossil fuels across multiple applications, transforming mobility, and enabling the expansion of digital infrastructure. In this context, regulatory modernization emerges as a key factor in ensuring predictability of rules and attracting investment over time.

Brazil's energy matrix, characterized by a high share of renewable sources and a dependence on hydrological conditions, represents a significant competitive advantage for the country. At the same time, the increasing frequency of prolonged droughts and extreme climate events reinforces the need for energy planning and for strengthening the resilience of critical infrastructure, taking into account scenarios of greater climate variability.

Discussions at EY House identified four priorities for the energy agenda:

- Long-term planning that incorporates extreme climate scenarios, in addition to average supply and demand projections
- Simultaneous strengthening of water security and energy security as pillars of economic stability
- Modernization of electricity transmission and distribution infrastructure, with a focus on operational efficiency and increased system resilience
- Integration between the expansion of energy supply, storage technologies, grid digitalization, and overall system stability

The energy transition was also addressed as a foundation for the digital economy and low-carbon industrialization. The advancement of digitalization, industrial automation, and artificial intelligence is expected to influence patterns of energy and water consumption, making reliability, predictability, and infrastructure efficiency key attributes of competitiveness.

The resilience of the electricity system depends on coordination between economic planning, long-term regulatory instruments, and financial mechanisms capable of absorbing the impacts of climate change. Beyond sector-specific targets, energy resilience also depends on the supply chains of equipment, maintenance, and data that support generation, transmission, and consumption—the invisible backbone of system security.

In the field of mobility, discussions highlighted that urban and interurban transport will continue to be one of the main drivers of global emissions trajectories in the coming decades. Decarbonizing the sector requires integration between industrial policy, urban planning, and technological innovation, avoiding fragmented sectoral targets that are not aligned with economic and territorial structures.

The main message emerging from the EY House discussions is that Brazil's energy transition requires truly integrated planning, supported by regulatory modernization and multisectoral alliances, essential conditions in a country whose economy depends on the reliability and resilience of its electricity system.

In this context, the growing demand associated with the digitalization of the economy, particularly the expansion of artificial intelligence and data infrastructure emerges as a new structural source of pressure on energy systems, with direct implications for planning, efficiency, and competitiveness.

Artificial Intelligence

The rapid expansion of artificial intelligence (AI) introduces a new dimension to the climate transition, with direct implications for energy systems, infrastructure, and economic competitiveness. In recent years, its adoption has accelerated, with AI particularly generative models, becoming an increasingly integral part of business operations and digital infrastructure.

Discussions at EY House indicated that this advancement is already beginning to reshape patterns of energy demand. The expansion of data centers, combined with the increasing computational intensity of AI applications, is placing additional pressure on power systems, requiring new levels of efficiency, grid integration, and long-term planning.

This trend brings significant implications. AI systems, particularly at scale, require substantial amounts of energy and water, with operational use (inference) accounting for a growing share of total consumption. The expansion of digital infrastructure is expected to accelerate, with emissions impacts that depend on system efficiency, infrastructure design, and, above all, the energy matrix. In this context, countries with cleaner energy mixes hold a relative advantage.

Despite this scenario, the technology is also evolving rapidly in terms of efficiency and, above all, application. Current use cases include supply chain optimization, improvements in logistics efficiency, advances in monitoring and traceability, management of electricity grids, and enhancements in agricultural practices and environmental monitoring. In carbon markets, AI contributes to improving data quality, transparency, and decision-making capacity.

As reflected in the discussions, the central issue is not the pace of technological advancement, but the conditions under which it is directed. The integration of digital efficiency, clean energy supply, and governance structures becomes critical to ensuring that its expansion contributes positively to climate objectives.

This context points to a growing convergence between digital transformation and the climate agenda. From the perspective of the real economy, competitiveness will increasingly depend on the ability to align AI adoption with energy systems, infrastructure, and environmental outcomes. In this sense, AI moves beyond being merely an additional driver of demand and becomes an accelerator of more efficient, resilient, and low-carbon economic systems.

Infrastructure

The infrastructure agenda was addressed in the EY House panels as one of the pillars of climate adaptation and the expansion of sustainable economic development. The discussions highlighted the growing need to strengthen infrastructure systems capable of responding to the impacts of extreme climate events and the intensification of urban risks. In this context, it was emphasized that urban resilience depends not only on the modernization of physical assets, but also on urban planning that incorporates sustainability criteria, smart densification, and environmental preservation.

Infrastructure is the backbone of urban systems: when planned with interdependencies in mind (water–energy–mobility), it reduces losses, prevents production disruptions, and protects lives. The impacts of climate change on Brazilian cities underscore the importance of developing integrated adaptation and mitigation plans, including vulnerability assessments and strengthening the response capacity of public administrations in the face of increasingly frequent extreme events.

Brazil, like Latin America as a whole, is predominantly urban, and the effective implementation of climate resilience solutions in cities generates impacts in areas with the highest population density and, at the same time, the greatest vulnerability for a large share of the population. The discussions emphasized that these plans must be aligned with municipal urban planning guidelines, particularly through the periodic revision of Master Plans, which guide land use, the management of risk areas, and the integration of gray infrastructure with nature-based solutions.

Coordination among different levels of government was considered essential for building an effective climate agenda, especially given the territorial and socioeconomic diversity of Brazilian municipalities. Strengthening the technical capacity of public managers, particularly at the municipal level, was identified as a key factor for project structuring and for accessing climate finance.

Recent experiences with extreme climate events in Brazil have highlighted the vulnerability of critical infrastructure systems, including energy networks, basic sanitation, telecommunications, and transportation. The modernization of distribution networks, urban tree management, and the adoption of solutions such as undergrounding electrical wiring were discussed as ways to increase operational resilience.

Public-private partnerships and concession models were identified as instruments capable of accelerating infrastructure investments, combining the public sector's planning capacity with the private sector's execution efficiency and financing capabilities.

The basic sanitation sector was highlighted as a priority area for expansion, particularly in light of national targets for universal access to potable water and sewage services by 2033. The increasing participation of private actors in sanitation auctions and the mobilization of resources to expand service coverage were identified as signs of sector dynamism.

Infrastructure sustainability was associated not only with reducing climate risks, but also with generating economic

and social value, with projections of increased economic activity, job creation, emissions reduction, and mitigation of public health impacts. By integrating infrastructure policies with sustainable urban planning guidelines, municipalities enhance their ability to promote balanced development, reduce vulnerabilities, and transform their territories into more resilient, inclusive environments prepared for the climate challenges of the coming decades.

EY has been conducting in-depth analysis of the value that ESG practices bring to infrastructure-related sectors (construction, transportation, logistics, sanitation, and energy) to support clients, partners, and organizations in developing more efficient and strategic agendas. Our analyses indicate that the consistent adoption of ESG practices can boost the sector by up to 5.6%, generating R$34 billion annually in the country's economy—clear evidence that the agenda is increasingly seen as a lever for national development.

Impact **Edge**

Sustainable Infrastructure

+R$ 34 billion
activated in the economy
(which represents 0.3% of GDP).

2.6% increase
in tax revenue.

5.6% sector growth.

293 thousand
jobs generated.

266.26 $MtCO_2$
in emissions avoided.

36 million liters
of water consumed.

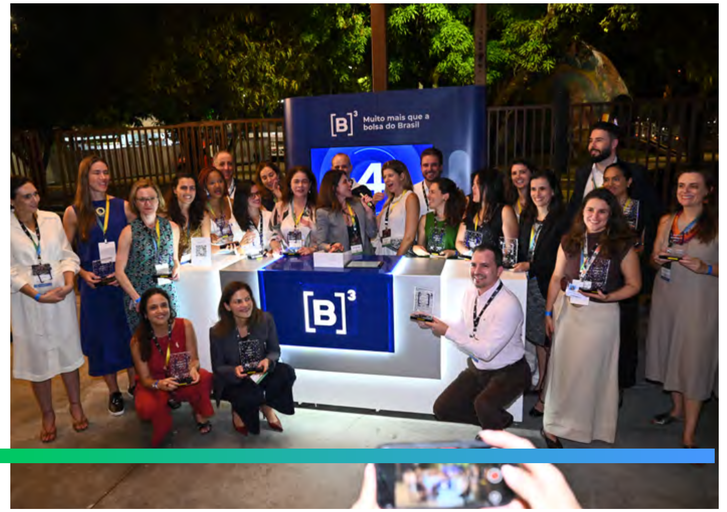
92 MWh of energy
saved.

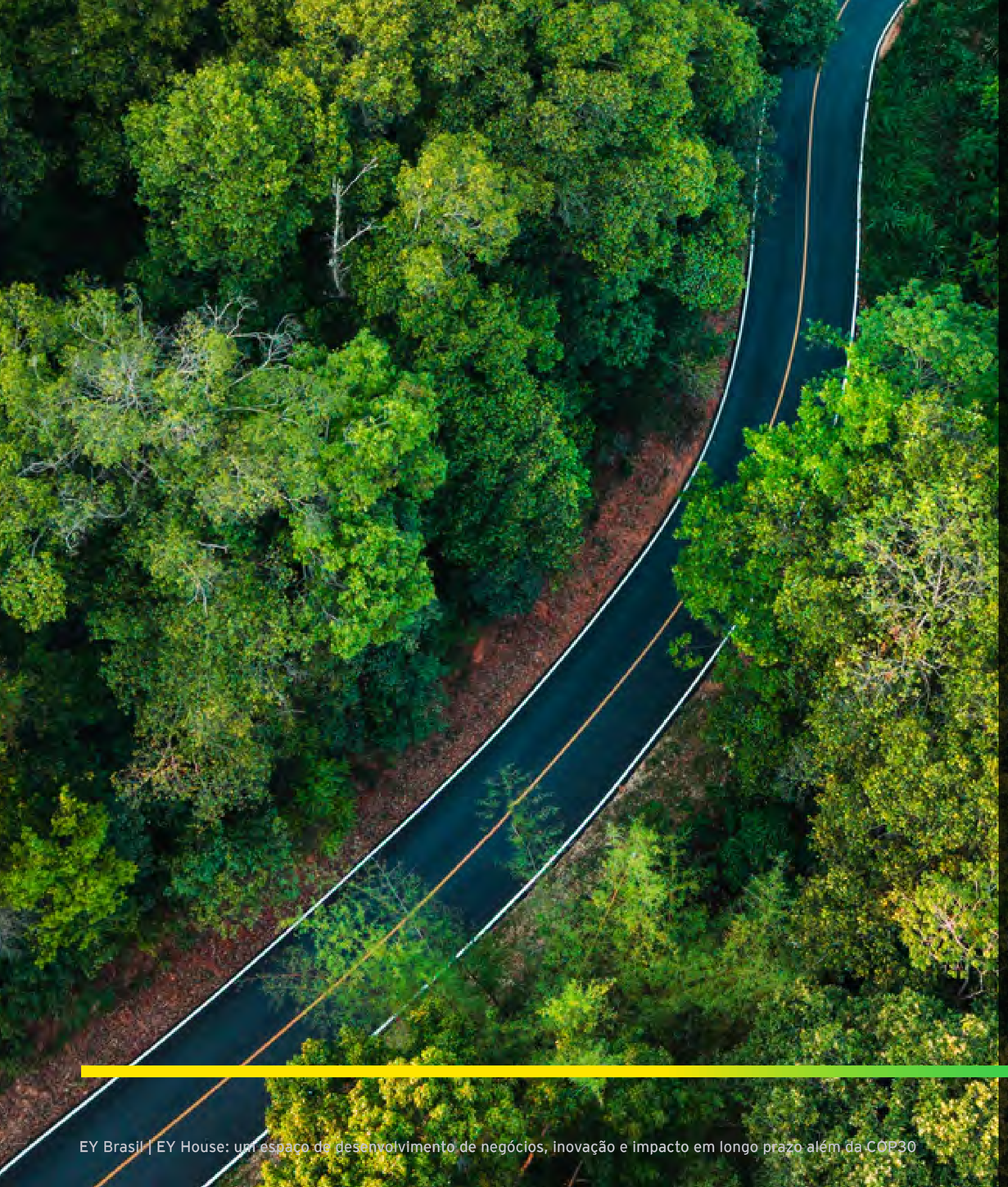
7.2 million tons
of waste avoided.

R$ 21.91 million
saved in the Brazilian public health system (Sistema Único de Saúde - SUS).

6,247 hospitalizations
avoided.

15,378 positions
for affirmative leadership roles created.





Carbon Market

In the EY House panels, the discussion on carbon markets highlighted Brazil's strategic role and the challenges of transforming natural assets into global leadership, while also exploring the country's role in the next generation of carbon markets.

Three pillars were identified as essential for market maturity: transparency, international integration, and execution capacity. A reliable environment reduces risks and strengthens the credibility of credits, while interoperability with international standards and platforms facilitates scale and global acceptance.

Discussions focused on the interdependencies that shape this market: the importance of establishing a transparent environment that reduces risks and builds trust; the need to develop interoperability to enable alignment with international regulations and platforms; and the urgency of scaling processes with credibility, ensuring that the quality of credits is verifiable and globally recognized.

The inherent complexity of carbon projects requires diverse expertise, robust methodologies, and continuous monitoring, reinforcing that the maturity of this market depends on a structure capable of sustaining its evolution over time. The credibility of credits, in turn, is built across the value chain: it is the consistency of source data, the integrity of monitoring, and the clarity of benefit-sharing that align standing forests, local income, and international recognition.

Brazil has the potential to transform its strategic resources into effective influence in the global carbon market. There are both opportunities and gaps to be addressed—from improving regulatory guidelines to strengthening governance mechanisms and aligning with established international standards. Building this future depends on initiatives that go beyond technical instruments: it requires coordination across sectors, clarity of purpose, and a commitment to results that strengthen both the regulatory environment and international trust.

Mining

The mining sector plays a central role in the climate transition agenda, particularly due to its connection with global industrial value chains, carbon markets, and international investment flows. Discussions held during the EY House panels highlighted the evolution of mining from a predominantly regulatory logic to a broader framework of economic, social, and environmental value creation.

Among the five sectors analyzed, mining is the one in which the relationship between the climate transition, international capital markets, and the attraction of global investment is most directly linked to economic development strategy. Moreover, the role of mining in the climate transition is directly tied to the governance of global critical mineral supply chains, which are essential for renewable energy, electric mobility, and advanced technologies. This positioning reflects Brazil's potential to establish itself as a relevant hub for climate capital, particularly in the context of expanding carbon markets and increasing requirements for traceability and socio-environmental governance.

The strategic value of mining is realized when value chains—from extraction to processing and logistics, operate with transparency, responsible resource management (including water), and effective engagement with local territories. In this context, including for critical minerals, this combination strengthens trust, reduces risks, and aligns competitiveness with socio-environmental expectations.

From an operational and regulatory perspective, discussions emphasized the importance of sustainable management of natural resources used in mining activities, with particular attention to water management, energy efficiency, and the safety of tailings dams and waste. The sector remains subject to a high level of public and regulatory scrutiny, reinforcing the need to continuously strengthen governance mechanisms, transparency, and socio-environmental accountability.

Companies that are more advanced in the ESG agenda have been shifting from compliance-focused approaches to structured strategies for risk mitigation and shared value creation, combining operational efficiency, environmental performance, and stronger relationships with communities.

The advancement of international non-financial reporting standards is a strategic factor for the sector, accompanying the evolution of global disclosure frameworks on climate, nature, and biodiversity, as well as the development of taxonomies and verifiable sustainability benchmarks for investment.

According to the Impact Edge study conducted by EY for COP30, the incorporation of environmental, social, and governance practices can generate productivity and efficiency gains capable of increasing the sector's value added by up to 20.81%, mobilizing more than R$399 billion in the national economy and positioning Brazil as one of the leading global players in low-carbon mining.

Impact **Edge**

Sustainable Mining

R$ 399 billion activated
in the economy (which represents 3.4% of GDP).

400 million
tons of waste avoided.

+ 3 million
jobs generated.

20.81%
sector growth.

19.52 $MtCO_2$
in emissions avoided.

93,056 hospitalizations
avoided.

R$ 47.77 million
saved in the Brazilian public health system (SUS).

4.8 trillion liters
of water preserved.

7,152 positions
created through affirmative leadership policies.

Financial Services

The financial sector plays a strategic role in the transition to a low-carbon economy, acting as a channel for capital allocation, risk mitigation, and the promotion of sustainable innovation. In the EY House panels, it became clear that financial services not only finance green projects, but also define the pace of sectoral transformation through ESG criteria, blended finance instruments, and corporate governance policies.

The integration of sustainability and climate risk management into Brazil's financial agenda is central to enabling the investments required in infrastructure, energy, agribusiness, and mining. Discussions highlighted that regulatory robustness, combined with transparency and traceability, is essential to strengthening the confidence of both domestic and international investors, allowing capital to flow toward positive-impact projects at scale.

The panels emphasized four strategic vectors for the sector:

- Adoption of global disclosure standards, audited reporting, and verifiable ESG indicators
- Prioritization of investments that promote emissions mitigation, climate resilience, and technological innovation
- Combination of public, private, and philanthropic capital to reduce access asymmetries and ensure that small and medium-sized projects receive adequate financing
- Coordination among banks, funds, insurers, and capital markets to enable sustainable sectoral transitions, ensuring multiplier effects across the real economy

In summary, capital gains scale when it reaches all links of the value chain: when financial instruments reach suppliers and distributors, they reduce risks, strengthen liquidity, and enhance competitiveness. This capillarity across more vulnerable links accelerates the adoption of low-carbon technologies and generates positive effects that propagate throughout the entire chain, increasing productivity and resilience.

In addition, the panels underscored that the transformation of Brazil's financial sector represents an opportunity for the country to consolidate its position in international green capital markets. The consistent adoption of ESG practices creates competitive advantage, financial resilience, and the ability to attract long-term investment, aligning economic performance with socio-environmental impact.

Conclusion

The discussions held during the EY House panels at COP30 reinforced that the climate transition is no longer merely an environmental challenge, but a structural agenda for economic development, competitiveness, and risk management in the real economy.

This eBook consolidates key reflections, evidence, and implementation pathways discussed in the EY House panels, with the objective of supporting solutions applicable to the real economy. The next phase of the climate agenda will be defined not only by the ambition of commitments, but by the quality of their implementation.

Across the five sectors analyzed, energy, agribusiness, financial services, mining, and infrastructure, it became clear that progress in the transition to a low-carbon economy depends on the ability to translate climate commitments into concrete, financeable, and scalable projects.

The energy sector was highlighted as the material foundation of economic decarbonization, particularly through the expansion of renewable sources, the modernization of grids, and the need to ensure supply security, system resilience, and regulatory predictability.

In agribusiness, sustainability was positioned as a central element of international competitiveness, combining increased productivity, traceability of value chains, and the strengthening of the Amazon socio-bioeconomy, with the forest also recognized as a platform for innovation, scientific knowledge, and value creation.

Financial services were identified as the primary mechanism for mobilizing capital for the climate transition, with emphasis on the role of blended finance, the transparency of non-financial information, and the reduction of the gap between investment supply and structured projects.

In mining, the ESG agenda was associated with the evolution of the industry toward shared value creation models, including sustainable water management, energy efficiency, material circularity, responsible closure of operations, and strengthened socio-environmental governance.

Infrastructure was discussed as an essential element for the adaptation of cities and economic systems in the face of increasingly frequent extreme climate events, with emphasis on the modernization of power grids, the expansion of basic sanitation, and the strengthening of public-private partnerships aimed at sustainable investment.

The overall discussions at EY House demonstrated that the main challenge of the coming decade will not be to define climate ambition, but to build implementation pathways capable of connecting strategy, financing, and economic execution.

This transition does not occur within isolated sectors, but across the value chains that connect them. Brazil's ability to transform ambition into results depends on the strength of these chains—agricultural, industrial, mineral, energy, and financial—and on how they integrate innovation, biodiversity, infrastructure, and productive inclusion. It is within this systemic space, where public policy, investment, and operational decisions converge, that climate implementation scales.

In this context, the Climate Plan 2024–2035 represents a relevant milestone in the organization of Brazil's climate policy, particularly by establishing an integrated approach that combines mitigation, adaptation, and long-term planning, including the structuring of sectoral plans as instruments for implementing the national climate strategy.

Collaborative initiatives such as the Global Implementation Accelerator can help transform climate commitments into real investment opportunities by supporting the structuring of project pipelines, increasing regulatory predictability, and expanding access to financing for the sustainable transition in the real economy.

The COP30–COP31 Action Agenda reinforces the importance of bringing political decisions closer to the real economy, accelerating solutions that can be implemented across value chains and monitored through transparent performance metrics.

Recommendations

Based on the discussions held at EY House and the perspectives shared by business leaders, experts, and representatives from various sectors of the economy, a set of enabling conditions emerged as essential to accelerate the implementation of the climate agenda in Brazil.

The recommendations presented in this section were consolidated from the main challenges and opportunities identified in the sectoral discussions at EY House. These points reflect private sector perspectives and have been organized in a cross-cutting manner to highlight enabling conditions capable of accelerating the implementation of the climate agenda in Brazil.

Discussions at EY House during COP30 made it clear that the climate transition only advances when it connects strategic vision, cooperative governance, economic incentives, technology, and local capacity. Based on the perspectives shared by business leaders, experts, and sector representatives, we have synthesized these contributions into five guiding principles to support the Presidency in building implementation pathways.

These principles reflect not only sectoral debates, but also the need to strengthen coordination among governments, the private sector, financiers, and communities—an essential condition for ensuring that the climate transition is just, effective, and integrated into Brazil's development.

Predictability for Investment

Stable regulatory environments, aligned with international standards and with clear rules, enable governments, companies, and investors to plan for the long term. Recommendations:

1. Strengthen the regulatory and institutional environment to expand the pipeline of financeable projects.
2. Consolidate national climate reporting standards, accelerating IFRS S1/S2 and the Brazilian Sustainable Taxonomy.
3. Align Brazilian regulations and certifications with international standards to ensure global competitiveness.
4. Establish a robust legal framework for environmental markets and nature-based solutions, with reliable certification and MRV systems.

Finance That Reaches Where It Matters

The ability to invest at scale depends on financial instruments that reach companies of all sizes and territories with diverse socioeconomic realities. Recommendations:

5. Expand blended finance instruments and risk mitigation mechanisms for capital-intensive and clean technology projects.
6. Reduce risks for long-term investments through guarantees and risk-sharing mechanisms.
7. Expand financial instruments for SMEs and suppliers, reducing systemic risks across value chains.
8. Create financial instruments for the bioeconomy and forest restoration, positioning nature as a strategic asset.

Infrastructure, Data, and Innovation as the Foundations of Scale

There is no implementation without reliable physical infrastructure, high-quality information, and technologies that enable efficiency on the ground. Recommendations:

9. Accelerate financing and expansion of critical infrastructure—renewables, transmission, storage, and hydrogen—with a focus on resilience and operational efficiency.
10. Develop market infrastructure for carbon and climate data, with robust and interoperable systems for registration, certification, measurement, reporting, and verification (MRV), connected to national and international platforms.
11. Integrate nature-based solutions (NbS) into traditional infrastructure to reduce risks and costs.
12. Develop carbon pricing mechanisms focused on operationalization and interoperability, aligned with data infrastructure and technical standards.

Implementation Through Value Chain Logic

The transition takes place across production, logistics, and financial value chains, and its effectiveness depends on coordination among all stakeholders. Recommendations:

13. Prepare supplier chains for the transition through technological capacity-building and access to financing.

14. Establish integrated strategies by value chain, aligning targets and metrics across interdependent sectors.

15. Integrate urban planning, infrastructure, and climate adaptation, prioritizing investments in resilience and physical risk reduction.

16. Strengthen public-private governance models capable of accelerating decarbonization in strategic industrial sectors.

Territorial Inclusion as a Value Strategy

The transition only gains legitimacy when it recognizes local capacities, sociocultural diversity, and the effective participation of communities. Recommendations:

17. Strengthen the technical capacity of local governments and regional operators to structure and implement projects.

18. Promote multi-stakeholder territorial agreements integrating companies, governments, communities, and financiers.

19. Recognize Indigenous peoples and traditional communities as key actors, with governance and benefit-sharing mechanisms.

20. Scale high-value bioeconomy value chains, connecting biodiversity, science, innovation, and global markets.

Strengthening the implementation of the climate agenda will depend on the collective ability to transform sectoral planning into concrete economic action, consolidating the transition as a structural pillar of Brazil's sustainable development.

EY brings together a unique combination of regulatory, financial, technical, and technological capabilities to act as an integrator of the climate transition. Our ability to engage and operate simultaneously with governments, regulators, companies, investors, and communities—combined with expertise in structuring robust project pipelines and translating public policies into effective implementation—has been a defining milestone for EY and its partners.

In December 2025, the EY House space became the headquarters of the Pará State Secretariat for Indigenous Peoples, consolidating a physical and social legacy. This transition reinforces our commitment to all dimensions of socio-environmental development, contributing to the bioeconomy and strengthening local communities, while also generating business insights.

EY reaffirms its commitment to collaborate constructively, inclusively, and in an implementation-oriented manner with the COP30 Presidency, connecting climate ambition, economic development, and execution in the real economy, and making available the experiences and solutions presented here as contributions to advancing the climate agenda and the Roadmaps.

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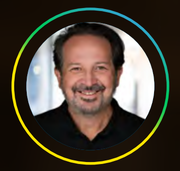

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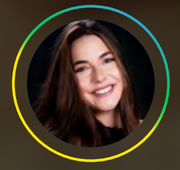

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