

# Sustainability Impact Assessment (SIA) in support of the negotiations for the modernisation of the trade part of the Association Agreement with Chile

(Contract No. Sl2.779300)

## Presentation of draft inception report

Civil society dialogue meeting  
Brussels, 04 July 2018



**bkp** DEVELOPMENT  
RESEARCH & CONSULTING

# Structure of presentation

1. Introduction
2. Economic analysis
3. Social analysis
4. Human rights analysis
5. Environmental analysis
6. Sector selection and analysis, and case studies
7. Consultations
8. Study schedule/time plan

# 1. Introduction

# SIA context and objectives

- 2003: Chile first South American country to have trade agreement with EU (part of Association Agreement)
- Since then:
  - Changes in global economy
  - Changes in trade agreements: NTBs and behind-the-border issues
- 2017: EU and Chile agree on modernisation of Agreement; negotiations launched 12/2017, ongoing
- **SIA objective:** provide robust, balanced, transparent, evidence-based, participatory analysis of potential benefits and costs of modernised Agreement

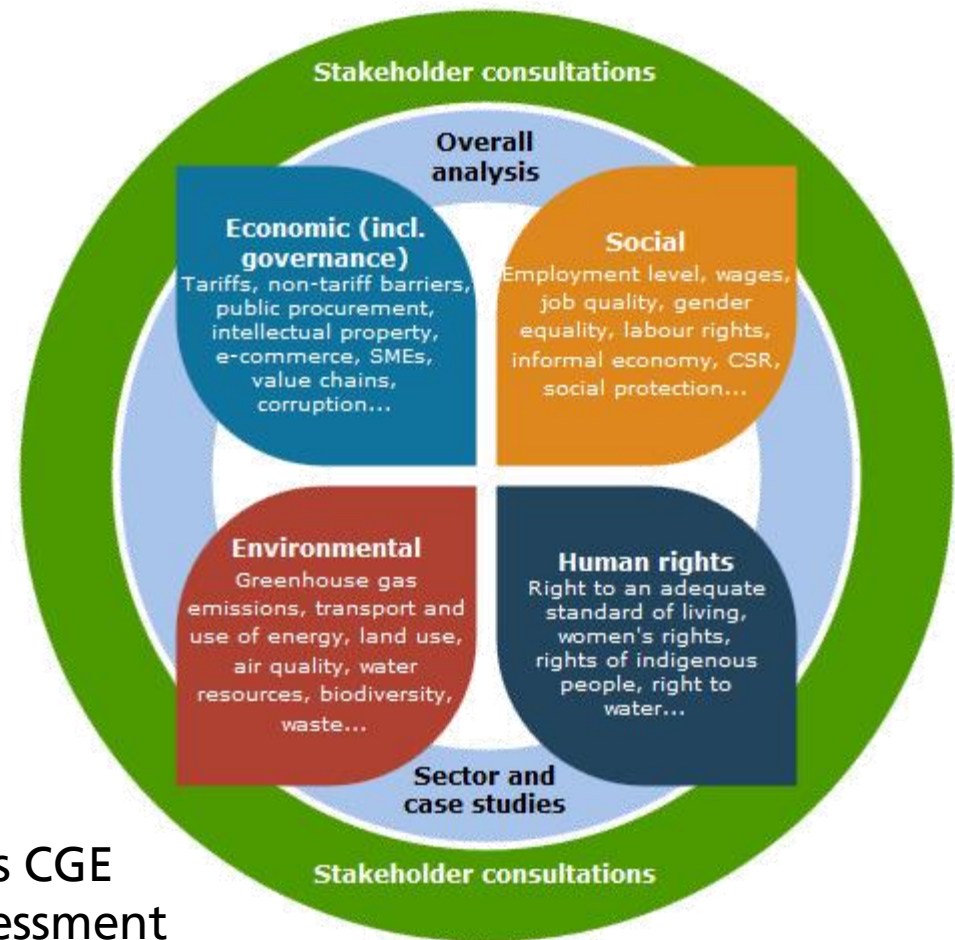
# SIA scope and overall approach

## ■ SIA scope:

- Types of impact of modernised agreement
- Scope of impact:
  - Economy-wide & sectoral
  - Specific groups and issues
- Location of effect:
  - EU
  - Chile
  - Third parties, esp. LDCs, EU Outermost Regions

## ■ Overall methodology:

- Quantitative (starting with EC's CGE modelling done for impact assessment)
- Qualitative (screening & scoping, causal chain analysis)
- Stakeholder consultations



# SIA inception phase

- Kick-off meeting: 26 April 2018
- Development of methodology
- Initial research: screening (& scoping)
- Stakeholder identification & mapping
- Initial contacting of stakeholders
- Website and social media set-up, preparation of surveys
- Inception report: June 2018

## **2. Economic Analysis**

# Issues to be studied and methodology

- **Output, trade flows, prices, income and welfare** => from CGE, additional NTB analysis: goods, services, investment
- **Fiscal revenues** (including revenues foregone) => from CGE
- **Public procurement** => quantitative: market size/ expenditures, text-based
- **Intellectual property rights & GIs** => qualitative, text-based
- **Digital trade** => mostly qualitative, text-based
- Impact on **SMEs** => SME Test
- **Value chain integration** => informed by CGE, TiVA database consultations, and text analysis
- Impact on **3<sup>rd</sup> regions (esp. LDCs, EU OR)** => informed by CGE, trade diversion and deflection analysis
- **Administration of ROO** => qualitative, consultations
- **Good governance/corruption** => qualitative, consultations, text



# Initial findings - baseline

- Main economic impact (CGE results)

	EU		Chile	
	Conservative	Ambitious	Conservative	Ambitious
<b>Major Macroeconomic Indicators</b>				
Welfare (EUR millions)	269	712	369	529
Real GDP (% change)	0.001	0.002	0.090	0.175
<b>Trade Impacts</b>				
Bilateral Exports (EUR millions)	1,948	4,220	102	227
Bilateral Exports (% change)	9.91	21.46	0.72	1.60
Total Exports (% change)	0.011	0.024	0.151	0.209
Terms of Trade (% change)	0.003	0.007	0.185	0.172
<b>Factor Markets</b>				
Real Wages Unskilled Labour (% change)	0.003	0.006	0.346	0.610
Real Wages Skilled Labour (% change)	0.003	0.006	0.191	0.370
<b>Key Ratios</b>				
Real GDP/Total Exports	0.09	0.08	0.60	0.84
Real Wages/Productivity	3.00	3.00	2.98	2.80

Source: Ecorys and CASE (2017: Table 4.3).

- Sectoral output:

- EU: machinery ↑ , automotive ↑ (but all less than 0.1% change)
- Chile: dairy ↑ (5%), fruits/nuts/veg. ↑ (2.7%), machinery ↓ (-1.7%), automotive ↓ (-1%)

# Initial findings - baseline

Very tentative findings from ex ante study and other selected literature review:

- **NTBs**: room for liberalisation in agricultural goods, goods, service and investment
- **Public procurement**: ex ante study: no effect from existing measures; some scope for improvement based on improved transparency
- **SMEs**: small but positive impact
- **GVCs**: deepened integration from expanded trade in intermediates
- Impact on **third regions**: very small overall
- Chile's **administrative capacity for ROO**: unlikely to be an issue
- **Other areas of analysis**: no findings yet (limited existing research)

# Key issues for study

- Based on CGE analysis: modernised FTA does not raise economic sustainability concerns:
  - Not in terms of the scale of impacts
  - Not in terms of adjustment pressures
  - Neither at aggregate economy nor at sector level:
    - EU: impact not palpably felt;
    - Chile: impact noticeable but still small for the most affected sectors
  - ⇒ Expected small implications for environmental, employment and other socio-economic impacts
- But: additional quantitative and qualitative analysis to be undertaken in SIA to validate this!

# 3. Social Analysis

# Issues to be studied and methodology

- **Current state of play** regarding social aspects in the EU and Chile related to analysed impacts, influencing factors, policy dialogue, ongoing negotiations, and EU-Chile cooperation.
- **Quantitative and qualitative analysis** of potential social impacts of the future trade pillar of the EU-Chile AA:
  - ex-ante external study, ex-post evaluations and the Commission's impact assessment as starting point;
  - literature review and analysis of available data to identify trends and impacts and factors influencing them (causal chain analysis);
  - update from negotiations, including chapters on trade and sustainable development, and trade and gender;
  - broad stakeholder consultations.
- **Policy recommendations and accompanying measures.**

# Initial findings - baseline

- Social indicators improved in the EU and Chile in the last few years, e.g. employment rate, poverty rate, women's participation, job quality (working hours, types of contract), and informality levels.
- Influencing factors: economic growth, new legislation, measures taken by the Government, trade and investment flows, and others.
- Uneven situation across sectors concerning job quality, with concentration of lower indicator performance in sectors which may be affected by the trade pillar of the EU-Chile AA.
- Uneven presence of trade unions and collective bargaining across sectors and types of enterprises.
- Increased attention dedicated to CSR, business and human rights, transparency and civil society involvement in the EU and Chile.

# Key issues for study

- Suggested focus on job quality, freedom of association, right to collective bargaining, social dialogue and impacts on women.
- Job quality seems to be an issue in sectors likely to be affected by the modernised FTA and chosen for a more detailed analysis.
  - Informality, wage levels, working hours, sub-contracting, accidents at work, skills development, and trade unions' presence.
- Sector analysis will focus on sectors important for women (e.g. trade, tourism and hospitality services) and men (e.g. mining and construction).
- Attention paid to development of global value chains and their impact on job creation and job quality.

# **4. Human Rights Analysis**



# Issues to be studied and methodology

## METHODOLOGY: 6-STEP APPROACH

**Step 1.**  
Pre-existing sensitivities/ Overview of existing cooperation

**Step 2.**  
Screening/scoping for likely affected specific human rights

**Step 3.**  
Quantitative analysis (linking econ., social, environmental results)

**Step 4.**  
Qualitative analysis (detailed assessment/ extent of the impact )



**Step 5.**  
Civil society consultations



**Step 6.**  
Policy recommendations and accompanying measures

## ISSUES

- International obligations (core human rights treaties, ILO Conventions)
- Human rights record/ human rights indicators
- Pre-existing sensitivities in human rights
- Existing mechanisms of cooperation in human rights
- Trade measures that cause potential impact
- Specific human rights potentially affected – kind and degree of impact
- Scope and content of the impact
- Extent of the impact
- Results of civil society consultations
- Policy recommendations and accompanying measures

# Initial findings - baseline

- Human rights record EU and Chile:
  - Ratification status of core international human rights treaties;
  - Ratification status of ILO Conventions;
  - HDI ranking

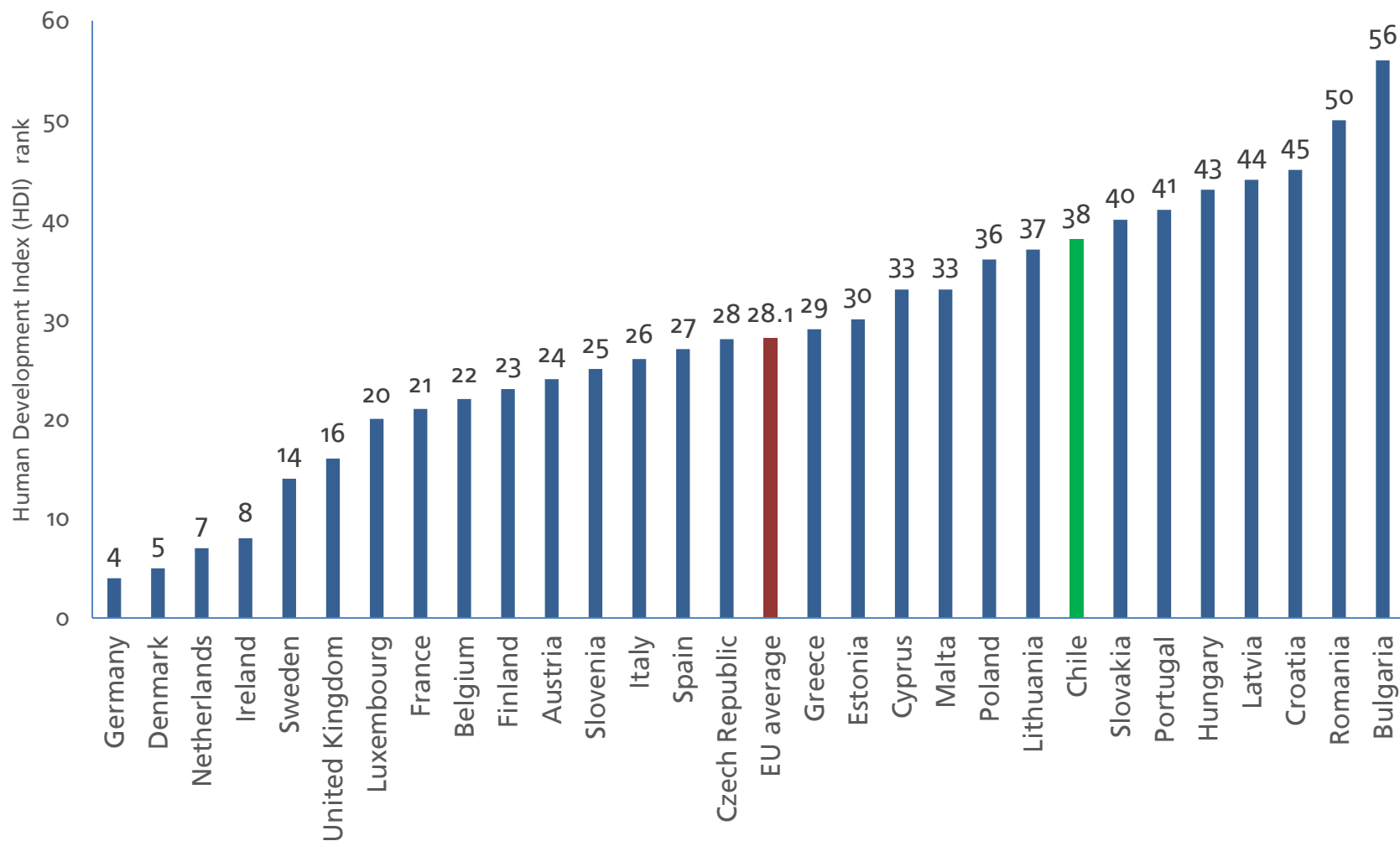
# Ratification status - core human rights treaties

Treaty	Chile	Austria	Belgium	Bulgaria	Cyprus	Croatia	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	United Kingdom **
CAT	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CAT	✓	✓	S	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	S	✓		✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
ICCPR	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICCPR-OP1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
ICCPR-OP2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
CPED	✓	✓	✓	S	S	S	✓	S		S	✓	✓	✓		S	✓		✓	S	✓	✓	S	✓	S	✓	S	✓	S	
CEDAW	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CEDAW	S	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓		✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓
ICERD	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICESCR	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICESCR-OP	S		✓							✓	✓				S	✓			✓		S		✓		✓	S	✓		
ICMW	✓																												
CRC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRC-AC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRC-SC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	S	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRC-IC	✓	S	✓		✓	✓	✓	✓		✓	✓	✓			✓	✓		S	✓	S		S	✓	S	✓	S	✓		
CRPD	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRPD	✓	✓	✓	S	✓	✓	S	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓			✓	S	✓	✓	✓	✓	✓

✓ Ratified; S: Signatory party; " " no action

Source: Compiled based on OHCHR Dashboard of ratifications ([www.indicators.ohchr.org](http://www.indicators.ohchr.org))

# Human Development Index ranking



Source: UNDP, 2016

# Initial findings – baseline

- Pre-existing issues of sensitivity:  
Current human rights situation Chile

## Based on ex-ante study:

- Past use of torture, extrajudicial killings, enforced disappearances;
- Use of force by police;
- Gender discrimination;
- Rights of indigenous peoples;
- Discrimination against LGBTI persons

## Based on additional analysis:

- Right to water – right to health – right to environment;
- Right to an adequate standard of living – right to adequate housing;
- Women's rights;
- Rights of migrants and asylum seekers;
- Discrimination based on social status

# Initial findings – baseline

- Pre-existing issues of sensitivity:  
Current human rights situation EU

## Based on additional analysis:

- Rights of migrants and asylum seekers;
- Discrimination against LGBTI persons;
- Women's rights;
- Discrimination against people with disabilities;
- Discrimination against national minorities;
- Children's rights;
- Right to privacy and personal data protection

- Existing mechanisms of cooperation between the EU and Chile aimed to respect, protect and promote human rights:
  - Political dialogue and diplomatic activities;
  - Plurilateral / bilateral cooperation;
  - External action instruments;
  - Projects launched/financed by Member States

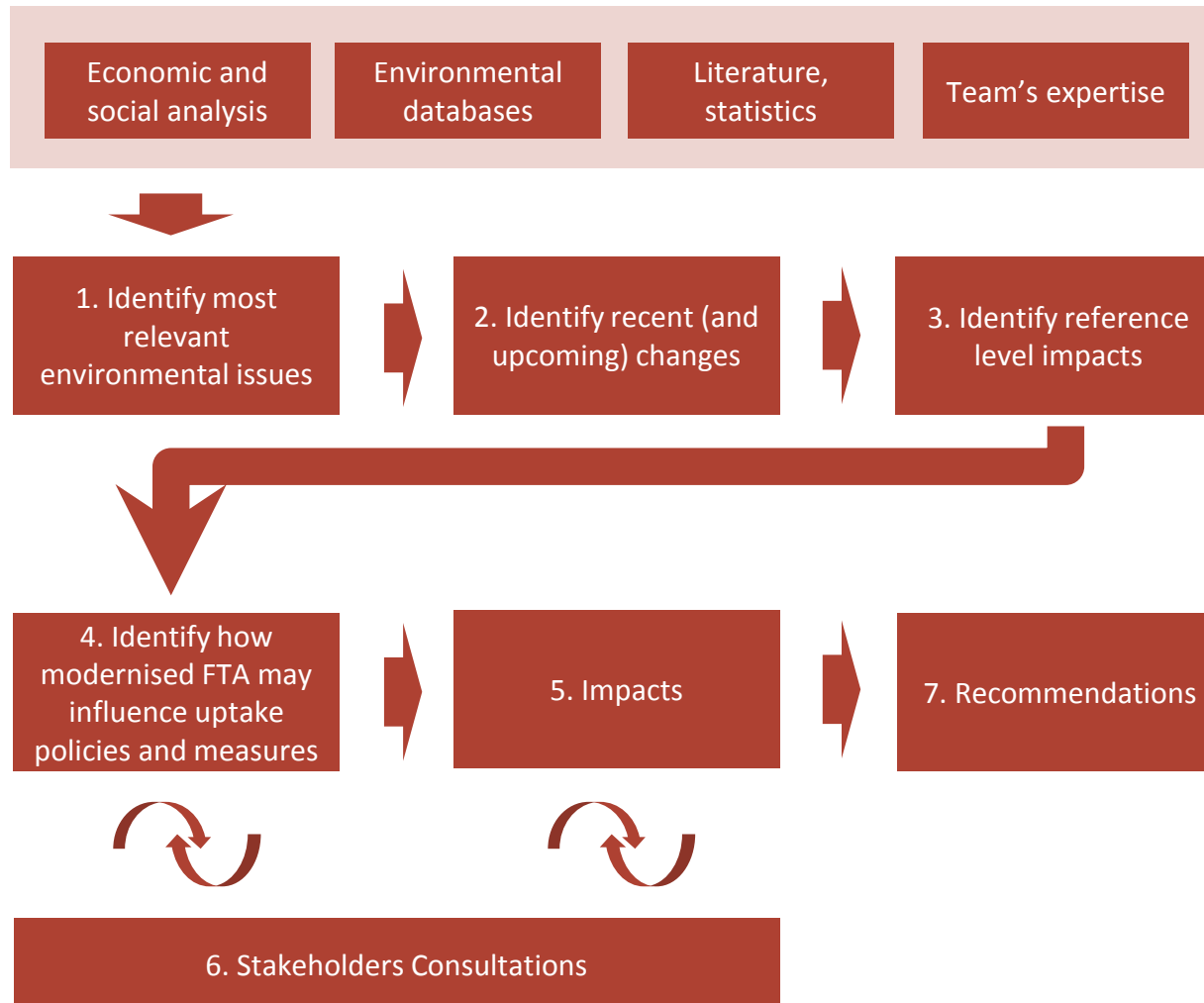
# Key issues for study

- Pre-existing sensitivities establish areas of stress and vulnerability & will help in analysing whether the trade measures under consideration could have a positive/negative impact with particular attention to vulnerable groups;
- Overview of existing cooperation between the EU and Chile may set certain base for promoting possible beneficial impacts and mitigating possible negative impacts of the modernised Agreement on human rights;
- Direct and indirect impact of the modernised Agreement on human rights will be studied in the next stage

# **5. Environmental Analysis**



# Issues to be studied and methodology



## Environmental Issues

1. Greenhouse gas emissions
2. Transport & use of energy
3. Air quality
4. Land use (incl. soil quality)
5. Biodiversity
6. Water quality & resources
7. Waste & waste management
8. Ecosystems services & protected areas

# Initial findings - baseline

Environmental Issue	Initial findings
1. Greenhouse gas emissions	Update baseline needed to reflect actual developments (e.g. decrease emission intensity), international agreements and recent regulatory changes
2. Transport & use of energy	Baseline developments are confirmed but strengthened policies and measures are required for target achievement
3. Air quality	Confirmation of earlier conclusions that modernised FTA will unlikely impact air quality. However, including specific provisions can lead to significant side-benefits in reducing air pollution
4. Land use (incl. soil quality)	Early conclusions confirmed that land use changes are likely insignificant. Additional assessment needed to confirm agricultural production efficiency improvement can ensure increased production without increased land use
5. Biodiversity	Example analysis of salmon farming identifies high local impact on marine coastal systems and food safety => potential case study
6. Water quality & resources	Confirms no likely impact of modernised FTA at overall economic level. But significant local environmental challenges identified, e.g. effluent discharge in mining; water stress from booming agricultural production => case study
7. Waste & waste management	Further data analysis needed; good quality data yet lacking to facilitate drawing conclusions
8. Ecosystems services & protected areas	Further research needs identified correlate with research needs for topics 'land use' and 'water quality & resources'

# Key issues for study

- Modernised FTA would likely have little direct environmental sustainability impact
- But: Agreement provides opportunity to strengthen specific regulations, standards or requirements that could significantly impact environmental directions. For example:
  - Strengthening Chilean climate regulation and improving opportunities for trade in low-carbon goods and services  
⇒ could impact especially the utilities and construction sector.
  - Including specific provisions for energy/transport policies, building regulations, reduction energy consumption for mining, and improved modal shifts  
⇒ could have important side benefits on air quality at local level
  - Including minimal conditions in procurement rules to address water stress concerns in agricultural production and improve effluent discharge management in mining  
⇒ could impact on water resources and management

# **6. Sector Selection and Analysis, Case Studies**

# Sector selection – method

- Sector and case studies:
  - Analyse impact of modernised agreement on selected **economic sectors**: 5-6 sector studies
  - 10-12 **thematic** case studies
    - Purpose: Illustrate more general findings; analyse specific aspects of the FTA
    - Typically qualitative analysis
- **Selection criteria**:
  - Economic importance of sector (in CL/EU) – CGE modelling
  - Magnitude of economic impact of modernised FTA (in CL/EU) – CGE modelling
  - Magnitude of social/HR/environmental impact (in CL/EU)
  - Importance of sector/issue as seen by stakeholders and from negotiation perspective

# Sector selection

Sector	Criterion 1: Economic importance		Criterion 2: FTA economic impact		Criterion 3: FTA social, HR, environmental impact		Criterion 4: Stakeholder and negotiating issues	Rank	Priority for selection
	Chile	EU	Chile	EU	Chile	EU			
27 Utility (construction, water)	High	High	High	Low	High	Low	Medium	1	High
29 Communication and business services	High	High	Medium	Low	Medium	Low	High	1	High
14 Minerals	High	Low	Low	Low	High	Low	High	3	High
22 Non-metallic minerals	Medium	Medium	Low	Low	High	Low	High	3	High
31 Recreational and other services	High	High	Medium	High	High	Low	Low	3	High
3 Vegetables, Fruits, nuts	High	Low	High	Low	Medium	Low	Medium	6	Medium
9 Dairy products	Medium	Medium	Low	Low	Medium	Low	High	6	Medium
10 Wood and paper products	High	High	Medium	Low	Medium	Low	Medium	6	Medium
16 Other food products	High	High	Medium	Low	Low	Low	Medium	9	Medium
15 Fishing	Medium	Low	Low	Low	High	Low	Medium	10	Medium
4 Oil seeds, vegetable oils & fats	Low	Low	Medium	Low	Medium	Low	Medium	11	Medium
21 Metal products	High	High	High	Low	Low	Low	Low	11	Medium
26 Electricity	Medium	Medium	Low	Low	Medium	Low	Medium	11	Medium
28 Transport	High	High	Medium	Low	Medium	Low	Low	11	Medium
24 Machinery	Medium	High	Low	High	Low	Low	Low	15	Medium
17 Beverages and tobacco	Medium	Medium	High	Low	Low	Low	Low	16	Low
23 Motor vehicles & transport equipment	Low	High	Low	High	Low	Low	Low	16	Low
7 Bovine and other ruminant meats	Medium	Low	Medium	Low	Medium	Low	Low	18	Low
1 Cereals	Medium	Low	Low	Low	Medium	Low	Low	19	Low
2 Rice	Low	Low	Low	Low	Medium	Low	Low	19	Low
5 Sugar	Low	Low	Low	Low	Medium	Low	Low	19	Low
6 Plant & animal fibres and other crops	High	Low	Low	Low	Medium	Low	Low	19	Low
8 Other meat (poultry, pig)	Medium	Medium	Low	Low	Medium	Low	Low	19	Low
11 Coal	Low	Low	Low	Low	Medium	Low	Low	19	Low
12 Oil	Low	Low	Low	Low	Medium	Low	Low	19	Low
13 Gas	Low	Low	Low	Low	Medium	Low	Low	19	Low
18 Textile, apparel, leather	Medium	Medium	Low	Low	Low	Low	Low	19	Low
19 Chemicals, rubber, plastic	Medium	High	Low	Low	Low	Low	Medium	19	Low
20 Petroleum, coal products	Low	Medium	Low	Low	Low	Low	Low	19	Low
25 Electronic equipment and other manufacture	Medium	Medium	Low	Low	Low	Low	Low	19	Low
30 Financial services and insurance	High	High	Low	Low	Low	Low	Low	19	Low

# Sectors proposed for detailed analysis

- **Construction** (economic importance; economic impact of FTA; role of SMEs; some social and labour issues);
- **Communication & business services** (economic importance; economic impact of FTA; IP issues; digital linkage)
- **Mining** (high economic importance; limited FTA impact – except possible through investment; some non-economic impacts: environmental, social, HR, governance);
- **Tourism & hospitality services** (economic importance; moderate to high expected FTA impacts; important for women; some social issues - informality, child labour, etc.);
- **Wholesale & retail trade** (similar to tourism & hospitality);
- **Dairy** (moderate economic importance; potential economic impact of FTA due to still existing protection; current issues, e.g. safeguards procedure in Chile – stakeholder views)

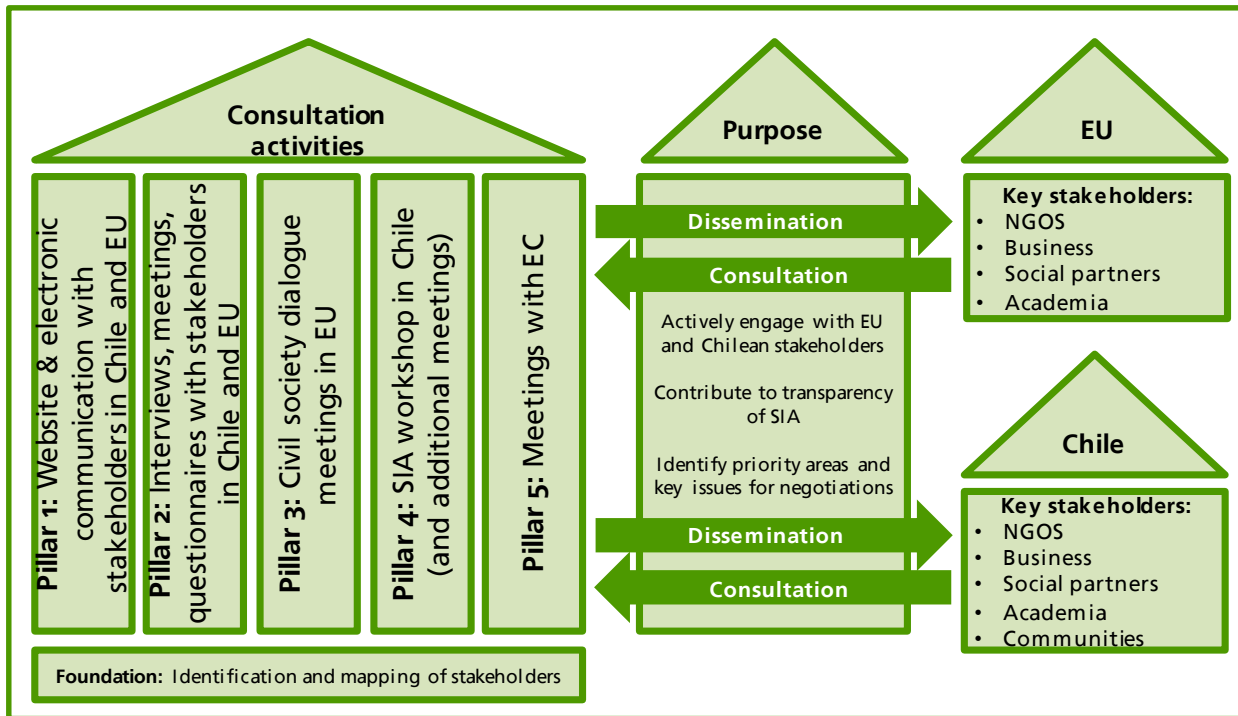
# Proposed case studies

1. **Olive oil** value chain (fast growing in CL; so far excluded from FTA; important role in EU lesser developed regions)
  2. **Lithium batteries value chain** (Chile main supplier of lithium to EU; strategic raw material)
  3. **Renewable energy** (investment issues; linkage with mining)
  4. Specific **Labour rights issues**, such as situation of women in the labour market, or job quality
  5. **FTA effects on rural communities** (effects in some sectors particularly affecting rural areas)
  6. **Effects on competition (M&A)** (due to changes in investment and competition provisions)
  7. **Effects on subsidies and state aid**
- ⇒ Room left for additional case studies as research progresses, such as specific products, groups, environmental topics, etc.



# 7. Consultations

# Consultation Plan & Overview



## Main characteristics:

1. Presenting draft results and holding them up against civil society scrutiny and feedback
2. Designed to draw in knowledge, understanding and on-the-ground experience of key stakeholders
3. Emphasis on an open and transparent process

## Core Components:

- Bring in new stakeholders not engaged previously
- Micro-blogs
- Semi-permanent engagement with Stakeholders
- Focus on disadvantaged stakeholders

# Stakeholder identification & mapping

- Identified stakeholders during inception phase:

Type of stakeholder	Number in Chile	Number in EU	Total number
Civil society	73	35	108
Private sector	63	235	298
Public sector	29	44	73
Social partners	12	51	63
Think Tank/Academia	24	19	43
<b>Total</b>	<b>201</b>	<b>384</b>	<b>585</b>

- Mapping of Chilean stakeholders:
  - Identify key stakeholders for each of the sustainability pillars
  - Determine existing consultation mechanisms
  - Identify gaps in representation

# Pillar 1: Electronic communication

- Website: EN + ES
- Social media
  - Twitter
  - LinkedIn
- eMail-Newsletter

The screenshot shows the website's header with the title "Sustainability Impact Assessment for the Modernisation of the EU-Chile Trade Agreement" and navigation links: Home, About, Resources, Consultations, and Contact. The main content area includes sections for "In a nutshell", "About Sustainability Impact Assessments (SIAs)", "About the modernisation of the Chile-EU trade agreement", and "About the EU-Chile SIA". A sidebar on the right displays tweets from @EUChileSIA. The footer contains copyright information for BKP Development Research & Consulting GmbH, contact details (+49-89-1787 6047, contact@trade-sia-chile.eu), and a disclaimer that the study is financed by the European Union and does not represent an official view.

The email newsletter features a header with the text "If this message doesn't show, please try the web version." and a background image of the EU and Chile flags. The main body text reads: "Dear Mr. Heran, We are contacting you because you have previously shown interest in the Sustainability Impact Assessment for the modernised EU-Chile free trade agreement. Chile and the EU have recently decided to modernise the existing Agreement, the trade part of which has been in force since 2003. The modernisation have started in November 2017 and are currently ongoing."

The LinkedIn profile for "Trade SIA Chile-EU" is shown, including the profile picture, name, company "International Trade and Development", 6 followers, and the website URL "http://trade-sia-chile.eu". It also indicates "3 followers in your network" and a "Follow" button.

The Twitter profile for "EU-Chile SIA" (@EUChileSIA) is displayed, showing the profile picture, name, bio, and statistics: 8 tweets, 24 following, 8 followers, and 5 likes. A tweet from @UEenChile is visible in the timeline.

# Pillar 2: Interviews and surveys

- 3 surveys in EN – ES – FR - DE:
  - **General survey** on impacts of modernised agreement
  - Survey focused on **consumer issues**
  - **Business/SME survey**
- Distribution:
  - **Online:** EU Survey
  - Paper: at workshops
- Survey period:
  - Mid-July to mid October
- Complementary face-to-face and phone/video interviews

EU-Chile Trade SIA: Public Consultation - Consumers

Fields marked with \* are mandatory.

Pages

Introduction About you Awareness **Consumer welfare** Consumer rights Conclusion

[D Your views on the expected effects of the modernised Agreement for consumer welfare](#)

D.1 Do you expect that, as a result of the modernised Agreement, the prices of consumer goods or services in your country will:

Increase

Decrease

Not change

I don't know

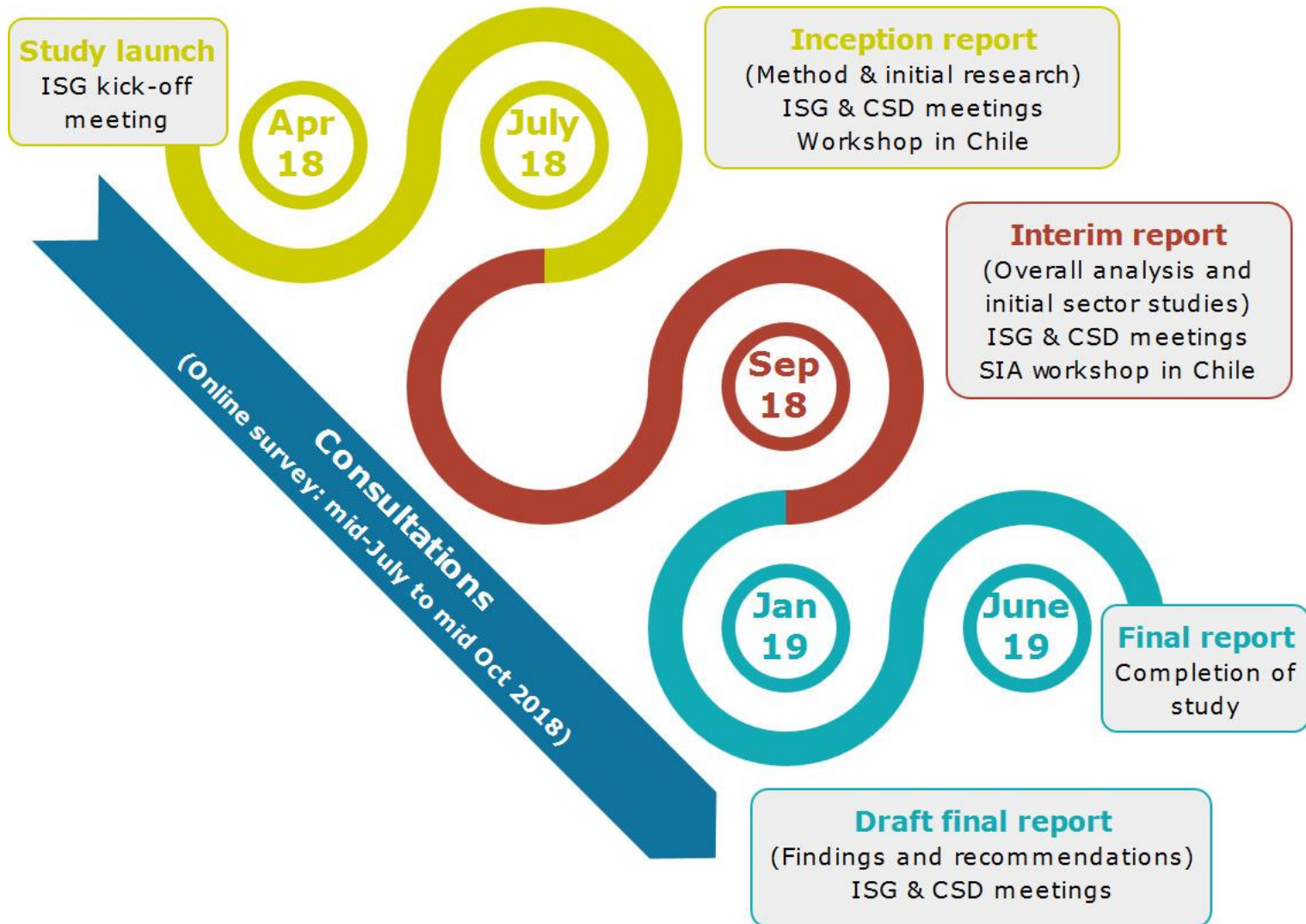
D.2 Please specify why

# Pillar 3-5: Workshops & meetings

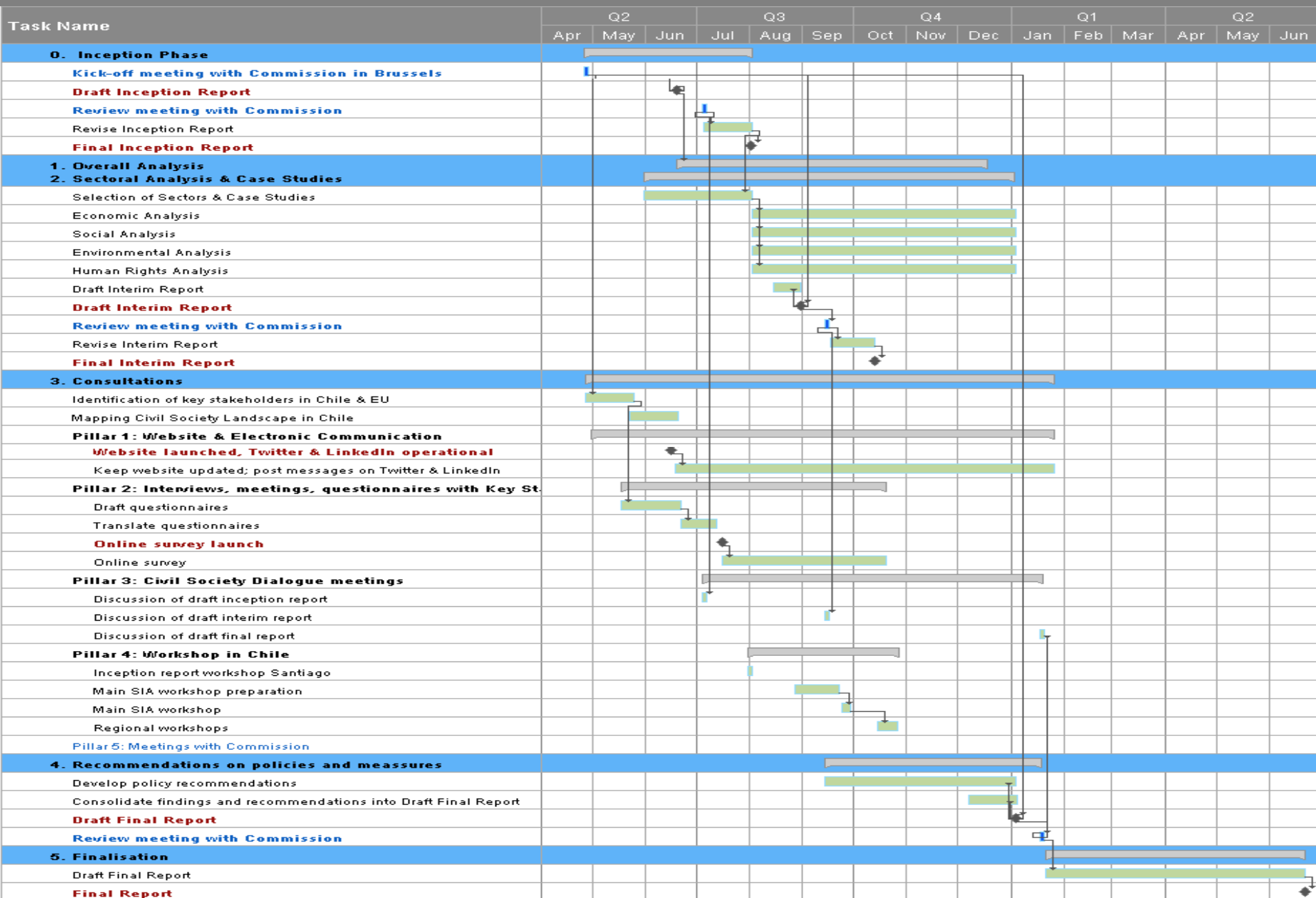
- Workshops in Chile:
  - Inception workshop: 31 July 2018
  - Main workshop: last week September 2018
  - 2 regional workshops: October 2018
  - Participation in meetings organised by EUD
  
- Meetings in EU:
  - 3 CSD meetings in Brussels: 04 July 2018; September 2018; January 2019
  - 4 meetings with Inter-Service Steering Group: 26 April 2018; 04 July 2018; September 2018; January 2019
  - Additional meetings as required

# **8. Study schedule**

# Overall schedule







# Stay in touch!



<http://www.trade-sia-chile.eu>



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