Digital Transformation in the Age of Artificial Intelligence

Empowering SMEs in the BRICS for a competitive future

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COOPERATION FOR AN INCLUSIVE AND SUSTAINABLE WORLD

BRICS SME WORKING GROUP
(Under the Partnership on the New Industrial Revolution – PartNIR)

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2025

Contextual Note

This publication is a deliverable, under the Brazilian Presidency of the BRICS in 2025, of the BRICS SME Working Group, established under the framework of the Partnership on the New Industrial Revolution (PartNIR). It reflects the collective commitment of BRICS nations to enhance the role of micro, small, and medium enterprises (MSMEs) as key drivers of inclusive economic growth, employment, innovation, and industrial transformation.

Recognizing this, the BRICS Summit Declarations have consistently emphasized the strategic importance of promoting MSME development. These declarations have called for the creation of a favorable environment for SMEs to thrive, to deepen cooperation among BRICS SMEs, foster integrated development, and establish a long-term, mutually beneficial, stable, and regular cooperation mechanism to support the integration of MSMEs into global industrial, value, and supply chains.

In alignment with these goals, BRICS Industry Ministers agreed, during the 8th BRICS Industry Ministers Meeting held under the Russian Presidency in 2024, to establish a dedicated Working Group on Small and Medium Enterprises. This initiative was further endorsed at the 16th BRICS Summit in Kazan, Russia, through the Kazan Declaration, which officially incorporated the SME Working Group into the institutional framework of PartNIR.

In this context, it fell to Brazil, in its capacity as the BRICS Chair in 2025, to give shape and substance to the SME Working Group, which had been formally established in 2024. Under Brazil's leadership, concrete steps were taken to operationalize the Group, laying the foundation for structured cooperation and delivering tangible outcomes that reflect the Group's mandate.

The BRICS SME Working Group aims to strengthen exchanges and cooperation among the competent authorities responsible for SME development across BRICS member countries. It serves as a platform to coordinate policy approaches, share best practices, and develop joint initiatives that equip MSMEs to meet the challenges and seize the opportunities of the New Industrial Revolution.

This publication offers insights, recommendations, and policy tools developed within the SME Working Group, reflecting the shared vision of the BRICS countries to empower MSMEs and promote sustainable, inclusive industrial development across the Global South.

Summary

Acknowledgments

This report has been developed under the auspices of the Brazilian Presidency of the BRICS 2025, as a deliverable by the BRICS SME Working Group. It was coordinated by the Ministry of Entrepreneurship and Small and Medium enterprises of Brazil (MEMP), with the participation of the Brazilian Network Information Center (NIC.br)/Brazilian Internet Steering Committee (CGI.br) and the support of the Brazilian Service of Support for Micro and Small Enterprises (SEBRAE).

The report benefited from contributions from Luciana Mancini, Fernanda Garcês de Vasconcelos and Pedro Amaral, from MEMP; and Alexandre Barbosa from Cetic.br. Chapter I was authored by Leonardo Melo Lins, with contributions from Fabio Senne, from Cetic.br. The analysis on which Chapter II is based was co-authored by Camila Leite and Diogo Moyses, with contributions from Ana Laura Martinez and Fabio Senne, from Cetic.br. Technical assistance was provided by NIC.br/CGI.br, with overall publication coordination by Ana Laura Martinez, from Cetic.br.

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Foreword

Small and medium-sized enterprises (SMEs) constitute the backbone of economic resilience, employment generation, and inclusive development across the BRICS countries and beyond. Representing around 90% of formal enterprises and nearly half of global employment, small and medium enterprises (SMEs) play a vital role in driving sustainable growth, fostering innovation, and reducing socioeconomic disparities. Within the BRICS context, SMEs are uniquely positioned to promote intra-BRICS integration and enhance participation in global value chains.

As the global economy undergoes rapid technological transformation, the digitalization of SMEs—especially through the deployment of Artificial Intelligence (AI)—offers significant opportunities to improve productivity, strengthen competitiveness, and support internationalization. AI-enabled tools and digital platforms are reshaping business models and offering novel ways for SMEs to overcome challenges such as limited market access, operational inefficiencies, and resource constraints. However, the benefits of these technologies are unevenly distributed, and many SMEs still face systemic barriers to full participation in the digital economy.

Recognizing both the transformative potential and the associated policy imperatives of digitalization, the BRICS countries have collectively prioritized SME digital transformation as a core pillar of their economic cooperation agenda. Initiatives such as the BRICS SME Working Group Action Plan lay the foundations for strengthened knowledge exchange, policy coherence, and joint action. These efforts are reinforced by the Strategy for BRICS Economic Partnership 2025, which highlights digitalization and AI integration as key enablers of SME participation in global value chains—and paves the way for an updated 2030 vision.

Unlocking the full promise of digital and AI technologies for SMEs requires sustained investment in human capital, robust digital infrastructure, and enabling policy environments. Addressing regulatory fragmentation, enhancing digital literacy, and promoting interoperable governance frameworks will be critical to building inclusive, secure, and future-ready digital ecosystems.

This publication draws upon the insights and key messages generated during a thematic webinar series held in early 2025: "Digital Transformation in the Age of Artificial Intelligence: Empowering SMEs in the BRICS for a Competitive Future." Organized by the Ministry of Entrepreneurship and Small and Medium enterprises of Brazil (MEMP), in partnership with the Regional Center for Studies on the Development of the Information Society

(Cetic.br), a department of the Brazilian Network Information Center (NIC.br), and the Brazilian Service of Support for Micro and Small Enterprises (SEBRAE), the series focused on four key pillars: AI adoption by SMEs, digital capacity-building, integration into e-commerce ecosystems, and regulatory alignment to support internationalization.

The objective of this publication is to provide policymakers, researchers, and practitioners of the BRICS with evidence-based analysis, actionable recommendations, and practical pathways for collaboration. It aims to support the development of environments in which SMEs can thrive in an increasingly digital and interconnected global economy.

This publication presents a synthesis of the webinars' main takeaways, contextualized within the broader SME digital transformation landscape and supported by recent data and research across BRICS economies. These insights are intended to inform forward-looking strategies and advance the implementation of shared priorities under BRICS economic cooperation frameworks.

We trust this publication will serve as a meaningful contribution to the ongoing dialogue—fostering cross-border partnerships, knowledge-sharing platforms, and coordinated policy action to empower SMEs. Through such efforts, BRICS countries can shape a more competitive, inclusive, and innovation-driven future for SMEs and the communities they serve.

Strategic Imperatives: AI, Digital Transformation, and BRICS SMEs

SMEs are integral to the socioeconomic fabric of BRICS countries. They contribute significantly to employment, innovation, and social cohesion across a wide range of economic sectors in both urban and rural areas. Their adaptability and strong local roots position them as agile actors capable of responding effectively to shifting market demands and emerging technologies.

Nonetheless, SMEs face persistent structural constraints, including limited financial resources, underdeveloped technological infrastructure, and restricted access to supportive policy frameworks. These challenges heighten their vulnerability to economic shocks and limit their ability to engage in digital transformation or participate in international trade. Addressing these barriers is essential to unlocking SMEs´ full potential.

Digital transformation refers to the comprehensive integration of digital technologies into business operations, reshaping how enterprises create and deliver value. For SMEs, this transformation goes beyond digitizing routine processes—it involves the strategic use of technologies such as

AI, data analytics, cloud computing, and e-commerce platforms to drive sustainable growth.

AI, in particular, offers substantial potential. It enables SMEs to optimize resource allocation, enhance decision-making, improve customer engagement, and predict market trends with greater accuracy. At the same time, it introduces challenges in data governance, ethical responsibility, and technological readiness—especially for SMEs with limited capacity.

Effectively leveraging AI within BRICS countries requires coordinated policy frameworks that support both innovation and inclusion. National digital strategies must be tailored to reflect sectoral priorities, local development contexts, and socioeconomic disparities to ensure equitable access and prevent widening of the digital divide.

The BRICS economic cooperation agenda has progressively elevated SME development as a driver of industrial modernization and inclusive growth. The Final BRICS MSMEs Cooperation Framework, adopted during South Africa's 2023 presidency, reaffirmed this shared commitment. Contributions from Russia in 2024 and Brazil's 2025 presidency—marked by the institutionalization of the BRICS SME Forum—further emphasize the strategic value placed on SMEs.

Under Brazil's leadership, PartNIR has introduced sectoral working groups, including one focused exclusively on SMEs. Starting in 2025, this group serves as a platform for structured dialogue, peer learning, and the dissemination of good practices across the BRICS member states. These mechanisms are essential to aligning policy, strengthening institutions, and generating practical knowledge.

Additionally, the BRICS SME Working Group Action Plan outlines a roadmap to deepen intra-BRICS trade, expand digital connectivity, and enhance SME participation in both regional and global markets. The forthcoming 2030 Strategy update represents a timely opportunity to further integrate AI and digital inclusion into the BRICS SME development agenda.

Despite these encouraging developments, challenges persist. Infrastructure gaps—especially in rural and underserved areas—limit digital access. Workforce skills often fall short of the needs of AI-driven models. Many SMEs struggle to secure financing for technology adoption. Fragmented regulatory environments also hinder cross-border digital trade.

Based on insights from the 2025 webinar series and supporting literature, several strategic priorities have emerged:

- Investment in digital public goods, including open-source AI tools, shared e-commerce platforms, and inclusive training programs;
- Policy harmonization to ensure regulatory interoperability and support cross-border engagement;

- Capacity-building initiatives, with special attention to gender equity and underserved populations;
- Public-private partnerships to scale innovation and expand the market reach and societal impact of AI solutions.

The integration of AI and digital technologies should be viewed not only as a path to competitiveness but as a strategic imperative for fostering economic inclusion and social progress. As digital ecosystems continue to evolve, SMEs must be equipped with the tools, skills, and institutional support necessary to participate fully and meaningfully in the global digital economy.

Toward a Shared Digital Future for BRICS SMEs

Through shared learning and coordinated action, BRICS countries have a unique opportunity to shape a common agenda that promotes digital inclusion, supports sustainable industrialization, and strengthens regional connectivity. Achieving this vision requires evidence-based policies, inclusive governance, and long-term investment in digital capabilities.

This publication contributes to that collective effort. Informed by diverse stakeholder perspectives and aligned with the strategic goals of BRICS cooperation, the chapters that follow present concrete recommendations for building a more inclusive and competitive digital future—one in which SMEs are not only participants but leaders in shaping a dynamic global economy.

Luciana Mancini
Chair, BRICS SME Working Group
Brazilian BRICS Presidency 2025

CHAPTER I

The State of Small and Medium-Sized Enterprises in the BRICS: Insights on Digital Transformation and Artificial Intelligence

The challenges of increasing the technological maturity of companies to enable greater digitalization of their processes are present across a wide range of global economies. These challenges become even more complex because emerging technologies are increasingly difficult to integrate into business routines, especially since their applications are not limited to specific functionalities or departments — a central feature of the general-purpose nature of recent technological change. In this regard, Artificial Intelligence (AI) presents significant adoption challenges for businesses, particularly due to the requirements for connectivity infrastructure and skilled labor, especially among small and medium-sized enterprises (SMEs).

Several studies and reports have already highlighted the characteristics of the barriers involved in spreading AI across companies.[1] To a large extent, it has been observed that the development and implementation of AI applications are concentrated in large corporations, largely due to their financial and human resource availability for exploring new technologies — resources that are scarce among smaller businesses. Moreover, research has shown that the use of AI often involves off-the-shelf solutions rather than in-house or customized development, indicating an incipient market that does not yet target firms with lower internal complexity.

If the implementation of AI already faces various obstacles in large companies across several countries, the challenges are even greater for small and medium-sized enterprises, especially in developing and emerging economies. Traditional issues for firms of this size—such as difficulties accessing credit lines or the lack of qualified personnel—present barriers not only to the adoption of new technologies but also to the overall operation of these companies, particularly in improving their digital presence.

1 Some examples are the ICT Enterprises 2023 survey in Brazil (CGI.br, 2024), Eurostat's 2023 survey (which ICT Enterprises takes as a reference) (Eurostat, 2024), Canada's Survey of Advanced Technology, 2022 (Statistics Canada, 2024), and the United States' 2023 Business Trends and Outlook Survey (Census Bureau, 2024).

Therefore, considering the complexity involved in the development and adoption of AI-based solutions, it is essential to assess not only companies' capacity to implement such applications but also how countries stand in terms of connectivity and the prerequisites for AI adoption. The purpose of this section is to highlight various characteristics of BRICS countries related to the promotion of the digital economy and the development of Artificial Intelligence, with the goal of creating mechanisms to enhance the technological maturity of their SMEs.

Connectivity in the BRICS

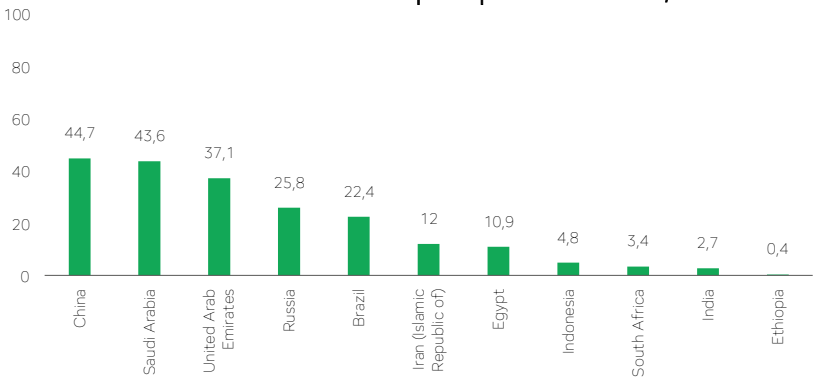
The capabilities that countries need to foster AI applications and development are the subject of much current debate.[2] Given the broad applicability of technology, there is no consensus on the minimum requirements for a country that is aiming to strengthen its AI development capacity. However, regardless of the level of AI maturity, a robust connectivity infrastructure is essential to advance within the digital economy.

It can be argued that a high level of connectivity indirectly influences the dissemination of AI, both by increasing data generation capacity and by requiring high-quality Internet connections to support cloud-based services. This becomes a crucial prerequisite without which a country will face basic difficulties already addressed by global technology leaders. Analyzing connectivity indicators is useful to assess how BRICS countries are positioned in terms of foundational capacities for AI adoption and development.

The presence of broadband connections in households is a key element for assessing countries' connectivity. High dependence on mobile connections for Internet access presents challenges, not only due to the exclusive use of mobile phones for tasks and digital skill development, but also because of connection quality issues, which limit the overall user experience. The use of broadband and computers, for example, enables a more comprehensive experience and is more suitable for developing digital skills. BRICS countries show wide disparities in this regard, with China leading in 2022 with the highest number of broadband connections per 100 inhabitants (44.7).

2 The Artificial Intelligence Index produced by Stanford University lists several aspects of AI research and development.

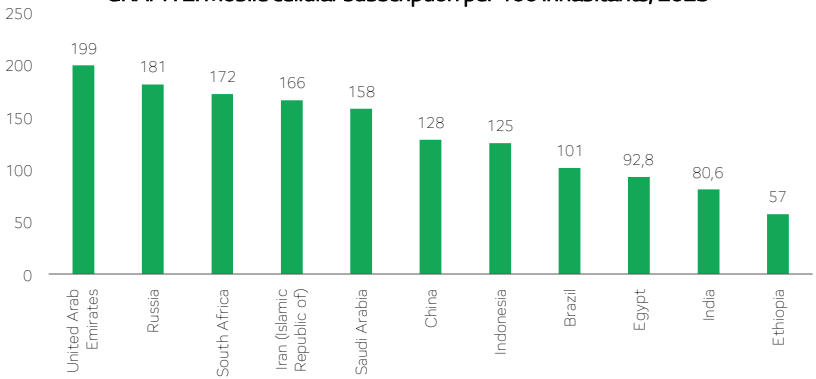
GRAPH 1. Fixed broadband subscriptions per 100 inhabitants, 2023



Source: https://datahub.itu.int/data/

Shifting the focus to mobile connections, there has been an increase in the number of subscriptions per 100 inhabitants, especially in countries that previously had low fixed broadband rates, such as South Africa and Indonesia. However, mobile connections still have their limitations, and improvements in fixed connections remain essential, as they offer more stability and speed. Furthermore, mobile Internet access is strongly associated with exclusive cell phone use, limiting access to applications that require higher bandwidth and often resulting in restricted use of social networks.

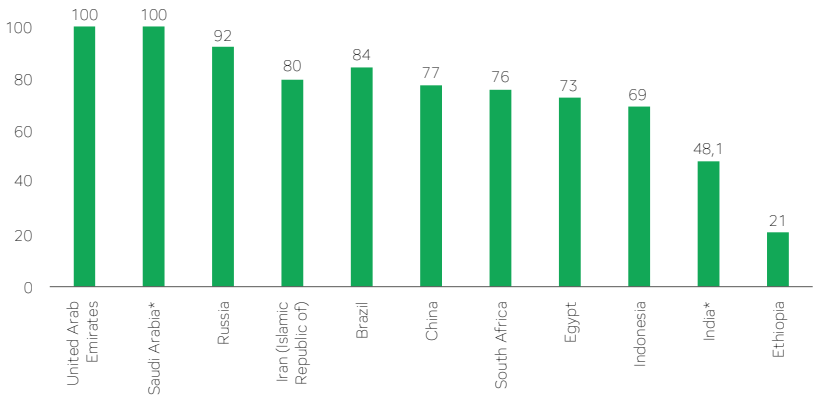
GRAPH 2. Mobile cellular subscription per 100 inhabitants, 2023



Source: https://datahub.itu.int/data/

Regarding Internet users, BRICS countries have relatively high proportions, with some reaching full population connectivity. However, attention should be paid to countries where fewer than 70% of the population uses the Internet. This may reflect not only a lack of mobile connectivity but also financial barriers preventing access to Internet services.

GRAPH 3. Individuals using the Internet, 2023



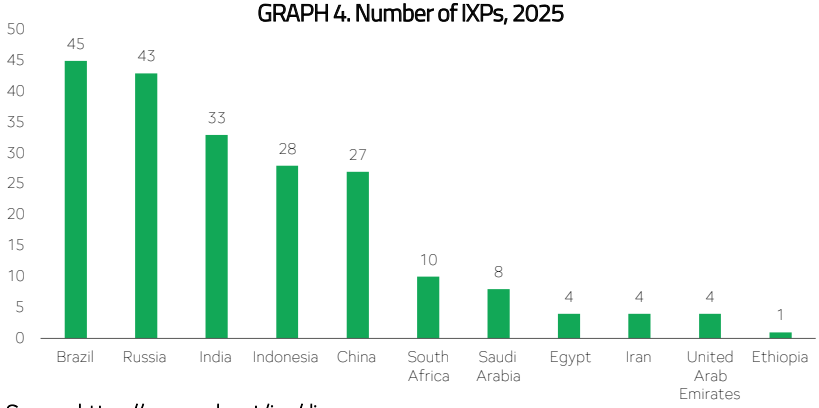
Note: *Data refer to 2022.
Source: https://datahub.itu.int/data/

Internet Quality

As connectivity expands and Internet use becomes more crucial for a variety of tasks—such as e-commerce, remote work, telehealth, online education, and others—the quality of connections becomes a critical asset. Having access to the Internet, although important, is not sufficient to take advantage of the opportunities offered by the ongoing digital transformation if it is not supported by high-quality connections.

Some aspects of countries' Internet infrastructure provide important insights into network maturity and potential for quality improvement. The number of Internet Exchange Points (IXPs), for instance, is a key indicator of a country's ability to expand and improve Internet usage. Unsurprisingly, the BRICS countries with the largest populations also have the highest number of IXPs, with Brazil leading. The presence of IXPs allows for more efficient network management, enabling faster access to key content and reducing latency.

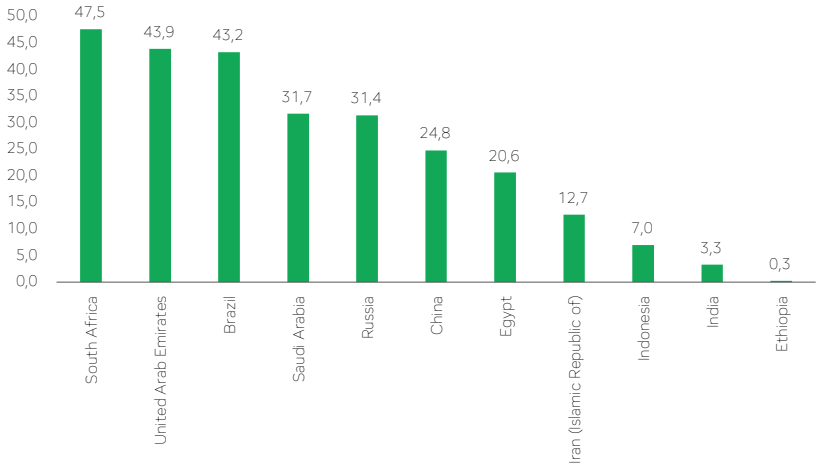
GRAPH 4. Number of IXPs, 2025



Source: https://www.pch.net/ixp/dir

The increased availability of Internet-connected devices also places a strain on connection quality due to traffic intensity. One crucial action to optimize online experience is to increase the number of devices connected via unique IP addresses. This becomes more important as more household devices connect to the Internet, making the availability of more IP addresses essential for better communication between devices. The spread of Internet of Things (IoT) devices will increasingly demand more IP addresses, also contributing to network resilience by allowing fewer devices to share the same identification, improving the ability to trace misuse.

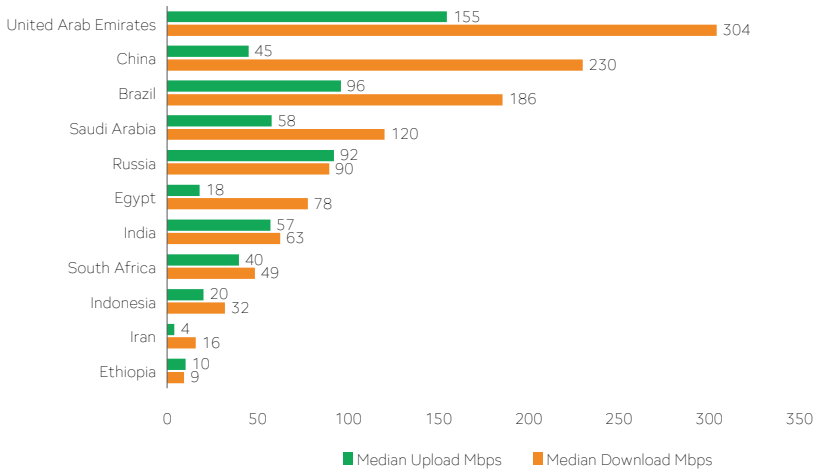
GRAPH 5. Number of IP adresses per 100 inhabitants, 2025



Source: https://research.domaintools.com/statistics/ip-addresses/

Finally, evaluating median download and upload speeds across BRICS countries provides insight into each member's network performance. The United Arab Emirates, China, and Brazil show the highest median download speeds. Upload speed is also increasingly relevant, especially as uploading videos and other content becomes a common Internet activity. In this regard, the UAE, Brazil, and Russia have the highest median upload speeds.

GRAPH 6. Median download and upload speeds, 2025



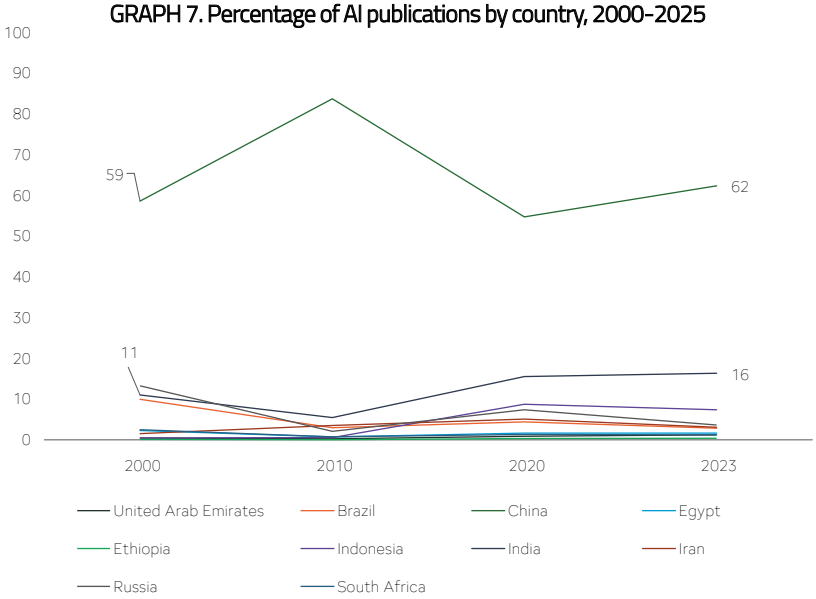
Source: https://www.speedtest.net/global-index

Connectivity indicators highlight that BRICS countries are highly heterogeneous in terms of Internet access and infrastructure. While some have nearly universal Internet access, there is room for growth in broadband coverage. As a bloc of emerging economies and developing nations, much Internet use is mobile-dependent, which places several limitations on the quality of online experiences. From an infrastructure standpoint, notable differences exist among the countries, with none standing out in all indicators, revealing strengths and improvement needs depending on the metric. Overall, the picture is one of progress in connecting populations, but with pending infrastructure challenges to achieving broader dissemination of faster, more stable connections.

Artificial Intelligence in the BRICS: Research and Development Indicators

Although the focus of this document is AI in business, it is also important to examine the AI research and development ecosystem in the BRICS countries. One of the most common indicators for assessing a country's research capacity is the volume of publications in a given field. China led AI research in the bloc as early as 2000, accounting for 59% of publications in the area—a share that rose to 62% by 2023. India, which had a share similar to Brazil and Russia in 2000, has since emerged as the second-largest producer of AI research in the bloc, responsible for 16% of its output by 2023.

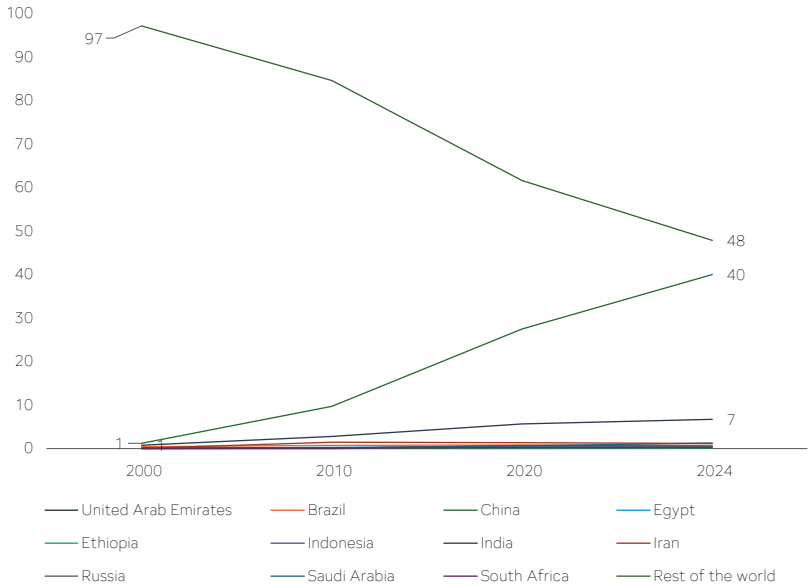
GRAPH 7. Percentage of AI publications by country, 2000-2025



Source: https://oecd.ai/en/data?selectedArea=ai-research

While the number of publications is growing, citations are a key indicator of their quality. A rise in citations suggests increased relevance of a country's academic output, as well as stronger investment in research and development and workforce qualification. China's growing share of publications is accompanied by a notable rise in citations, which rose from just 1% of global citations in 2000 to 40% in 2024. India, despite growing publication numbers, has shown a slower increase in citations, accounting for 7% of global citations in 2024.

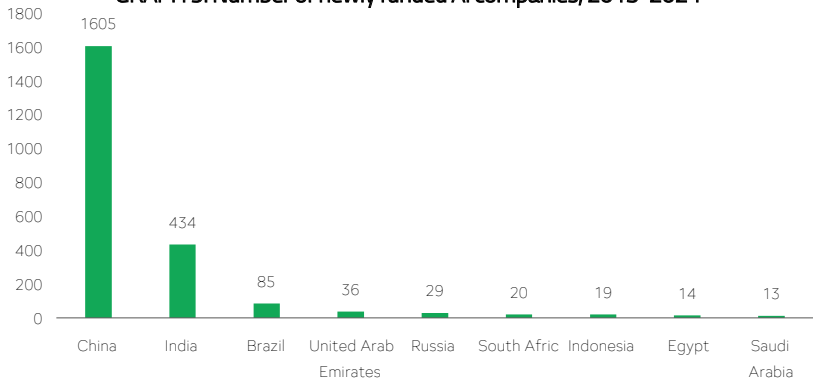
GRAPH 8. Percentage of AI citations by country, 2000–2025



Source: https://oecd.ai/en/data?selectedArea=ai-research

A strong AI research and development ecosystem requires more than academic production; it must also include investments in businesses and promising projects. Reflecting publication trends, China and India lead in the number of AI startups founded in 2023. According to a Stanford report, between 2013 and 2024, China launched 1,605 AI companies, followed by India (434) and Brazil (85).

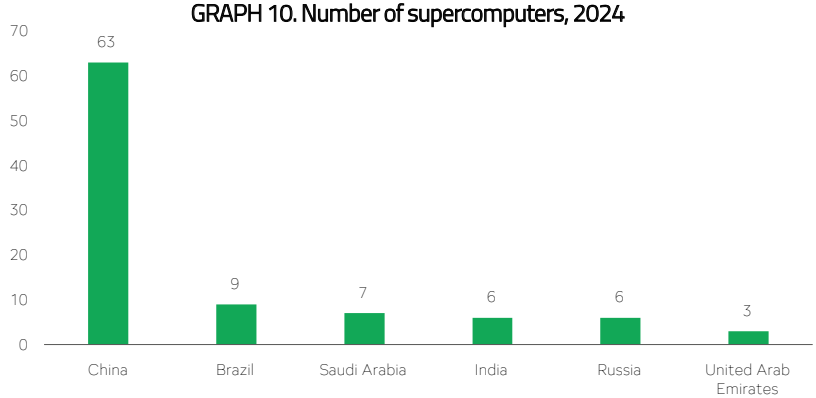
GRAPH 9. Number of newly funded AI companies, 2013–2024



Source: https://hai.stanford.edu/ai-index/2025-ai-index-report

Owning supercomputers is a decisive factor for countries aiming to train AI models. Increasingly, powerful computing capacity is needed to process large datasets, representing a key competitive edge in AI development. The list of operating supercomputers ranks machines by floating-point operations per second (FLOPS). Among BRICS nations, China leads with 63 supercomputers, followed by Brazil and Saudi Arabia.

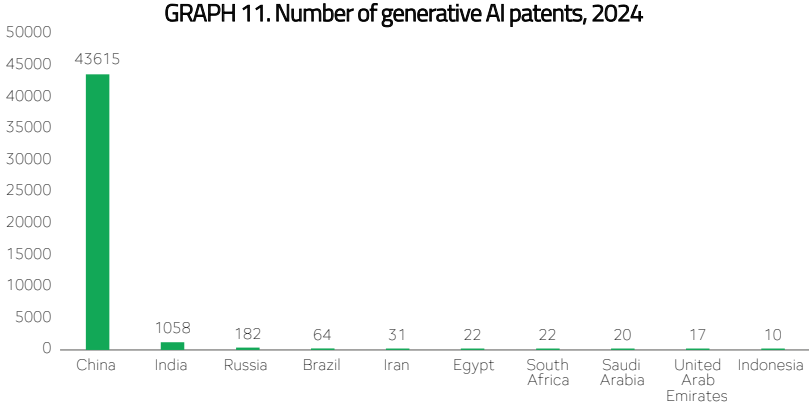
GRAPH 10. Number of supercomputers, 2024



Source: https://top500.org/lists/top500/2024/11/

Lastly, patent filings are a key measure of a country's ability to transform research and development into marketable innovations. The number of AI-related patents—especially in generative AI—reflects the practical application of AI capabilities. Between 1999 and 2023, China dominated with 43,615 patents, followed by India with 1,058.

GRAPH 11. Number of generative AI patents, 2024



Source: https://www.wipo.int/en/web/patent-analytics/generative-ai

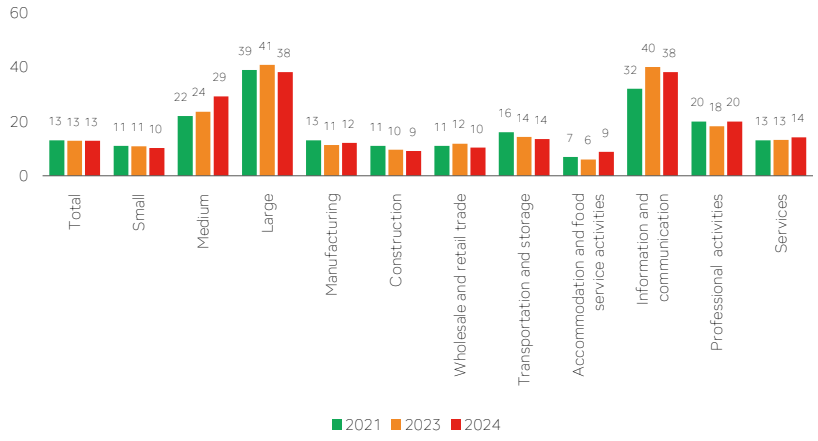
From a connectivity standpoint, BRICS countries present a diverse landscape, with some nearing universal Internet access and others still facing key challenges. This disparity also extends to connection quality, as critical infrastructure for stable connections needs further development across the bloc. In terms of AI development assets, China and India give the bloc considerable global weight, producing most of its academic output and receiving the highest number of citations and patents.

Brazilian Experience on Measuring AI in Small and Medium Enterprises

The ICT Enterprises survey has been conducted regularly since 2005 by the Brazilian Internet Steering Committee (CGI.br), through the Regional Center for Studies on the Development of the Information Society (Cetic.br), a department of the Brazilian Network Information Center (NIC.br). The survey's results have highlighted the progress and, especially, described the main challenges that arise in the competitive realm as a result of digital transformation, focusing on the digital environment of organizations, revealing the extent to which Brazilian enterprises are tapping into the potential unleashed by information and communication technologies (ICT). In 2021, the ICT Enterprises survey began incorporating indicators on AI adoption, based on the model developed by the Statistical Office of the European Union (Eurostat). This allows for a comparison of this set of indicators with the results obtained in European countries, providing an overview of Brazil's position in relation to some of the most developed economies in the world.

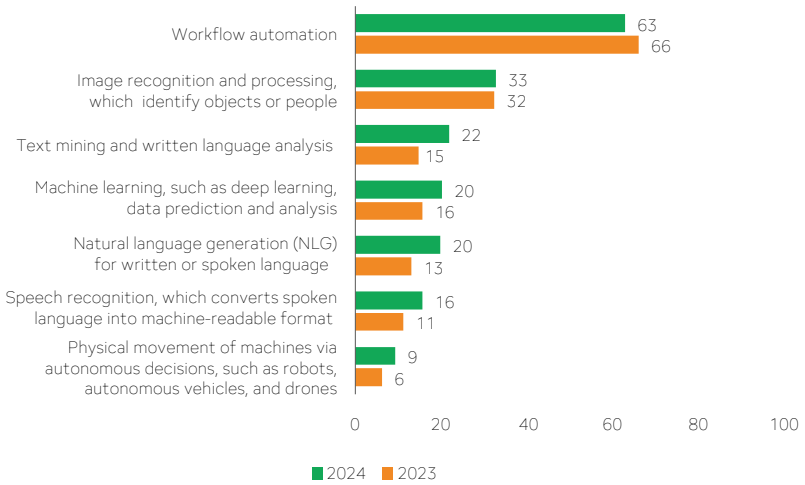
The ICT Enterprises 2024 survey showed stability in AI usage compared to 2023. A higher presence of AI among large companies and in the ICT sector also stood out among the firms that adopted the technology. The data pointed to difficulties faced by companies in implementing AI applications in their routines. In terms of financial and human costs, this is perhaps the most complex step toward broader digitalization, given the low adoption among small businesses and the concentration of usage in large enterprises.

GRAPH 12. Enterprises that used AI technologies, by size and sector (2021-2024)
Total number of enterprises (%)



The analysis of the types of AI most used by companies reveals that its incipient adoption is related to the solutions offered by the market. In 2024, among the companies that used AI, 63% reported using it for the automation of workflow processes, a figure that was 66% in 2023. The use of AI within companies appears to be more closely tied to the automation of specific processes, largely aimed at complementing the qualifications of organizational staff. Available evidence on the relationship between AI and labor shows increased productivity in highly skilled professions, given the growing potential for automating complex tasks..

GRAPH 13. Enterprises that used AI technologies, by type (2023-2024)
Total number of enterprises that used AI technologies (%)



China

As discussed above, China leads research and development within the bloc, with significant global prominence. The effects of major investments in education and cutting-edge research are reflected in both academic and market outcomes. According to government data, there are around 4,300 companies working with AI, reaching a market value of 500 billion yuan, along with growing investments in advanced connectivity to support data generation and analysis.[3] According to the World Economic Forum, China aims to expand its local AI companies to reach a market value of USD 140 billion by 2030, consolidating the country as a collaborative hub for Artificial Intelligence research and development.[4] A survey by CPA Australia showed that 9% of Chinese companies surveyed had adopted AI significantly, while 43% had adopted it in a limited way. According to the results across all countries, AI usage is more common among large companies, and the most frequently cited impact of AI on business routines was "Improved efficiency through the automation of repetitive tasks."[5,6]

3 Source: https://www.gov.cn/yaowen/liebiao/202307/content_6890391.htm

4 Source: https://reports.weforum.org/docs/WEF_Blueprint_to_Action_Chinas_Path_to_AI-Powered_Industry_Transformation_2025.pdf

5 Source: https://www.cpaaustralia.com.au/-/media/project/cpa/corporate/documents/tools-and-resources/business-management/business-management-research/business-technology-survey-2024.pdf?rev=b9d9fdf58c544c1fa2e8a39f29a84401

6 Source: https://www.cpaaustralia.com.au/-/media/project/cpa/corporate/documents/tools-and-resources/business-management/business-management-research/business-technology-report_2024_digital_v1.pdf?rev=8afe59dc4a9a4ef295e1346c5e20c378

India

The same survey on AI usage in Chinese companies also examined AI adoption among Indian companies. Among Indian firms, 23% reported having adopted AI significantly, while 33% reported limited adoption.[7] Regarding the use of AI among small businesses, a survey conducted among micro, small, and medium-sized enterprises in the technology sector revealed that 65% were unaware of the correct tools and resources to implement Artificial Intelligence, 91% stated that the technologies were not accessible, and 59% cited budget constraints, highlighting the challenges in scaling AI adoption within these organizations.[8] It is worth noting that small and medium-sized enterprises contribute 29% to India's GDP, highlighting their importance to the economy as well as the opportunities for AI research and development in the country.[9] Finally, India's National AI Strategy estimates that investments in AI research and development could add USD 957 billion to the country's GDP by 2035, with an impact of 1.3% on economic growth. Moreover, the strategy envisions establishing India as a hub supporting the emergence of AI companies, with 1,566 businesses already operating across various sectors, from robotics to health care.[10]

7 Source: https://www.cpaaustralia.com.au/-/media/project/cpa/corporate/documents/tools-and-resources/business-management/business-management-research/business-technology-report_2024_digital_v1.pdf?rev=8afe59dc4a9a4ef295e1346c5e20c378

8 Source: https://nasscom.in/ai/ai-enablement/pdf/enablement-of-ai-for-msme-whitepaper.pdf

9 Source: https://static.googleusercontent.com/media/publicpolicy.google/pt-BR//resources/india_ai_opportunity_agenda_en.pdf

10 Source: https://indbiz.gov.in/indias-artificial-intelligence-strategy-ai-for-all/

Saudi Arabia

According to official estimates, in 2023, Artificial Intelligence accounted for 2.32% of Saudi Arabia's technology market, rising to 2.88% in 2025.[11] Considering public and private initiatives, the goal is for AI to represent 5% of the technology market by 2030. Furthermore, as part of broader investments in technology, positive returns are also expected for the country's GDP. Accordingly, the Saudi government's actions aim to expand the digital economy's share—particularly through advancements in Artificial Intelligence—thus strengthening the companies leading AI development in the country. It is also worth noting that, according to estimates, with the advancement of AI, the goal is to achieve nearly 40% GDP growth compared to 2010 levels, highlighting the potential to transform the economy through technological investment.[12]

Indicator	2023	2024	2025	2026	2027	2028	2029	2030
GDP Prediction Billion SR (Constant price 2010)	2994,64	3117,69	3237,66	3366,72	3502,71	3645,8	3796,99	3957,82
Digital Economy Prediction Billion SR	460,8	490,76	522,66	556,63	592,81	631,34	672,38	716,08
Share Tec. Of DE Billion SR	261,28	280,52	301,17	323,35	347,17	372,73	400,18	429,65
AI Share of Tec. Market Size (57% of Total Market Size)	2.32%	2.58%	2.88%	3.22%	3.59%	4.01%	4.48%	5.00%
TFP Base SCN	2,093	2,103	2,112	2,128	2,142	2,155	2,167	2,18
TFP SCN Increase 20% of AI market size	2,093	2,113	2,125	2,142	2,158	2,172	2,186	2,202
GDP Prediction after AI market growth Billion SR (Constant price 2010)	2994,64	3133,8	3256,34	3388,4	3527,9	3675,06	3831	3997,39
Increase of GDP Billion SR	-	16,11	18,68	21,68	25,18	29,26	34,02	39,58

11 Source: https://www.imf.org/en/News/Seminars/Conferences/2024/11/20/12th-statistical-forum

12 Source: https://blogs.worldbank.org/en/arabvoices/estimating-the-economic-impacts-of-ai-in-saudi-arabia

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CHAPTER II

Contributions from the "Digital Transformation in the Age of Artificial Intelligence" Webinar Series

Introduction

The webinar series aimed to discuss strategies to empower small and medium-sized enterprises (SMEs) across the BRICS nations by fostering strategic dialogue on the transformative potential of Artificial Intelligence (AI) and digital technologies. The discussions, held between March and April 2025, focused on enhancing competitiveness, driving innovation, integrating SMEs into global value chains, and unlocking new growth opportunities within BRICS countries and beyond.

Organized around key themes, this webinar series aimed to raise awareness, facilitate knowledge exchange, and promote evidence-based discussions on digital transformation for SMEs. Additionally, these webinars provided a platform for stakeholders to explore practical strategies for adopting AI, examine governance frameworks that promote inclusivity, and share insights on digital skills development to help SMEs thrive in a rapidly evolving economic landscape. The sessions also highlighted AI tools specifically tailored for SMEs and presented practical solutions for fostering growth and resilience by adopting digital technologies.

This report summarizes the knowledge shared in each panel, highlighting the main outcomes of the panel and the key takeaways from each speaker. The report closes with recommendations shared throughout the events, for both the BRICS countries and SMEs.

Executive Summary

KEY POINTS

Webinar	Panel	Key points
Webinar 1: AI and Digital Transformation of BRICS SMEs	Panel 1: Harnessing AI for Productivity and Innovation in SMEs	• The role of AI in increasing the global competitiveness of BRICS countries • AI applications that have driven SME growth • Strategies for scaling AI adoption within SMEs to enhance efficiency
	Panel 2: Digital Skills for the Future: Building Capacities for AI Integration	• The role of both basic education and specialized professional training in supporting digital transformation • Programs and initiatives designed to equip workers with digital skills for AI adoption • The impact of upskilling on SME success and long-term growth • Main challenges faced by BRICS countries

Webinar 2: Market Access and Internationalization for BRICS SMEs	Panel 1: E-Commerce and SMEs in the BRICS	• Trends and challenges in adopting AI tools for e commerce in the SME sector • Successful e-commerce strategies in BRICS countries • Insights on BRICS government policies and private sector initiatives enabling SMEs to embrace AI in e-commerce
	Panel 2: Fostering Digital Policies and Internationalization for SMEs	• Harmonizing regulations across BRICS to support SME digital transformation and market access • The role of AI and digital tools in expanding SMEs into new markets • Case studies or examples of successful SME internationalization through digital strategies
	Roundtable: BRICS Perspectives on SME Digital Transformation	• Successful national approaches to supporting SME digital transformation • Overcoming regional challenges in market access and digital adoption • Collaborative opportunities within BRICS to foster SME growth

RECOMMENDATIONS

Stakeholder		Recommendations
For All		• Promote ethical and human-centered interaction between people and technologies. • Establish multisectoral and inter-institutional coordination mechanisms to drive digital transformation. • Expand investment in digital infrastructure and ongoing training. • Encourage digital transformation and the strategic use of AI and data for informed business decisions. • Encourage partnerships with other sectors, such as fintech and integrated digital platforms. • Fostering a digital export culture through e-commerce is essential. • Encourage international collaborative networks and regulatory exchange. • Promote secure, reliable, and interoperable digital environments.
For BRICS Countries	Capacity-building	• Create national AI training programs with creative and dynamic methodologies. • Establish multilateral knowledge exchange platforms. • Train talent in emerging technologies to meet global demand.
	Regulation	• Harmonize digital policies and create safe environments for experimentation. • Develop inclusive regulation that focuses on data protection and local contexts. • Develop public policies that foster the digitalization of SMEs.
	Cooperation	• Encourage international partnerships and integrate SMEs into digital supply chains. • Create collaborative technology centers and public support platforms.

For BRICS Countries	Investment	• Invest in digital infrastructure and expand connectivity in remote areas. • Accessible funding mechanisms for SME digitalization.
	PPPs	• Encourage international partnerships and integrate SMEs into digital chains.
For SMEs	Capacity-building	• Promote technical training in AI and digital tools. • Encourage financial education and technology management programs for SMEs. • Facilitate access to training through partnerships with public and private institutions.
	Implementation	• Use AI tools to improve productivity, decisions, and competitiveness. • Adopt digital solutions gradually and adapt them to the company's reality. • Invest in practical tools integrated into the business routine.
	Collaboration	• Establish partnerships with technology providers and centers of excellence. • Integrate into support networks and public or multilateral digitalization programs. • Invest in practical tools integrated into the business routine.

Webinar 1: AI and Digital Transformation of BRICS SMEs

Panel 1: Harnessing AI for Productivity and Innovation in SMEs

This panel discussed real-world case studies and strategies for AI adoption and scaling in BRICS SMEs. It focused on how these technologies enhance productivity and innovation and create a competitive advantage for SMEs while also identifying their main challenges.

In summary, the panelists showed that integrating AI into value chains can help reduce inequality, support inclusion, provide access to global markets, and significantly boost productivity. However, the benefits are not evenly distributed: Firms operating in digitally advanced environments are far more likely to experience transformative outcomes. In practice, AI is already transforming SMEs through applications that drive efficiency and growth. Platforms such as SEBRAE's AI initiatives in Brazil and Russia's ANO "Digital Platforms" are equipping SMEs with the knowledge and tools to make data-informed decisions and scale innovation.

To achieve this, equitable adoption of AI across the BRICS can be accomplished through technology transfer, shared best practices, and coordinated policies that address digital readiness gaps. Additionally, scaling AI adoption requires a comprehensive approach that combines professional skills development, strategic vision, inclusive infrastructure, and cross-sector partnerships. Public policy also plays a crucial role in ensuring that AI-driven transformation is accessible, sustainable, and aligned with broader development goals.

1. Key Points

1.1. The Role of AI in Increasing the Global Competitiveness of BRICS Countries

The implementation of AI by BRICS countries is both disruptive and strategic. Integrating AI into the value chain can help reduce inequalities, promote inclusion, create new markets, and boost global GDP, potentially enhancing SME productivity, efficiency, and competitiveness.

While countries with more digital readiness offer more valuable opportunities for companies, the equitable adoption of AI among the BRICS countries can be achieved by exchanging best practices, including technology transfer.

> *AI could contribute USD 15.7 trillion to the global economy by the year 2030, which means a 14% increase in world GDP [...] This will also affect productivity, and some studies even point to an expected USD 6 trillion boost in the productivity of the global economy.*
>
> Denis Bruno Viríssimo, AI & Analytics Manager, Institute for Technological Research (IPT), Brazil

> *The ITC (International Trade Centre) Enterprise Digital Transformation Index [found that] 80% of the firms that use digital technologies increase sales and/or reduce costs. [...] [Also,] those [companies] that adopt technologies intensively according to the ranking within our index are five times more likely to boost their sales by more than 50% [...] compared to emerging users and the expert digital users are also 12 times more likely to see their costs reduced over 50%. [... Meanwhile], when companies operate in countries where the digital enablers are lacking, where the environment is not conducive, they struggle, and this is especially true for the most vulnerable groups.*
>
> Valentina Rollo, Head of Research, International Trade Centre (ITC)

1.2. AI Applications that Have Driven SME Growth

SEBRAE, in Brazil, supports the empowerment of SMEs through AI by providing courses and a transformative digital platform, "SEBRAE Canvas" that offers essential knowledge for informed decision-making. It aims to improve productivity for employers and business partners.

In Russia, the Supervisory Board of the Digital Economy (ANO) "Digital Platforms" is a leading resource for both the public and private sectors. It is working to eliminate economic barriers to sector development, including benefits for SMEs.

Meanwhile, ChatGPT and Gemini are still among the most widely used generative AIs (GenAIs). GenAIs have the potential to transform business competitiveness by generating new opportunities in existing and emerging markets, with the ability to enhance customization and personalization.

> *The interaction between people and technologies will be an intrinsic part of future development, enabling these technologies to become practical tools that assist companies and enhance the employability of emerging technologies such as AI, which must exist for the common good.*
>
> Evgeny Osadchuk, Director of the Artificial Intelligence Department of the Supervisory Board of the Digital Economy (ANO), Russia

1.3. Strategies for Scaling AI Adoption within SMEs to Enhance Efficiency

To effectively scale AI adoption among SMEs and enhance their operational efficiency, it is essential to integrate AI strategically, considering not only the technological components but also professional skills development and the organization's broader strategic vision. Additionally, addressing accessibility and inclusion is key, promoting equal access to AI for the common good. Lastly, fostering partnerships between technology providers and SMEs is essential to further accelerate the digitalization process and promote collaboration in research and education, ultimately driving sustainable innovation .

Governments also play a vital role in this endeavor by addressing the technological divide and developing harmonized policies that facilitate SMEs' access to digital technologies and AI. They also invest in digital infrastructure and support systems.

2. Speakers Report

2.1. Luciana Mancini, Special Advisor to the Minister on International Affairs and Chair of the BRICS SME Working Group, Brazilian Presidency of BRICS 2025

Ms. Mancini opened the event by emphasizing the vital role of sustainable digital transformation and AI in boosting the competitiveness of SMEs in the BRICS countries. The opening also highlighted that integrating AI into the global value chain can help countries to overcome challenges such as limited market access and operational inefficiencies, while also promoting inclusion and optimizing efficiency.

> *The success of digital transformation for SMEs will depend on robust digital governance and international cooperation. Policymakers must work towards harmonizing regulations to create an inclusive digital ecosystem; encouraging fair competition in AI-driven markets; and equipping SMEs with AI-based skills to ensure they remain competitive in an evolving global economy.*

2.2. Valentina Rollo, Head of Research, International Trade Centre (ITC)

Ms. Rollo presented key early findings from the 2025 edition of ITC flagship publication, the SME Competitiveness Outlook (to be launched in July at the ITC SME Ministerial), based on a survey of SMEs in 78 countries. She highlighted the benefits of digital transformation, noting that 80% of companies adopting digital technologies reported higher sales and lower costs, boosting productivity. Gains were especially strong among expert digital users. Whether firms become expert users largely depends on their environment: in digitally ready countries, 60% of firms are expert users—three times more than in low-readiness countries where barriers are greater and vulnerable groups are particularly affected. Ms. Rollo emphasized the role of government in creating an enabling digital environment and the need for SMEs to act where gaps exist, focusing on three areas: financial management, staff training and engagement with business support organizations.

> *Data shows that even in economies with lower digital readiness, several small businesses manage to do well and thrive. What do they do to achieve this? We identified three main areas: they have good financial management, [...] they manage to identify and train staff [...] and they engage with organizations such as associations and chambers of commerce [...] to help them navigate these regulatory complexities.*

2.3. Clariça Soares, Coordinator of Innovative Entrepreneurship, Ministry of Development, Industry and Commerce (MDIC) of Brazil

Ms. Soares highlighted the challenges of digital transformation for Brazil's SMEs, especially due to costs, complexity, and a skills shortage in AI and technology in general. Key government initiatives to overcome these challenges include "Mission 4" (Missão 4) of the "New Industry Brazil" (Nova Indústria Brasil - NIB) policy, which aims to achieve the digital transformation of 25% of industrial companies by 2026. By 2033, the goal is for 50% of the industry to adopt key technologies such as cloud computing and AI. The "More Productive Brazil" (Brasil Mais Produtivo) program seeks to increase productivity by disseminating best production and management practices among Brazilian SMEs and promoting digital transformation in the industrial sector. This includes consultancy for SMEs to develop their own digital transformation plans, as well as the Smart Factory project, which aims to enhance the adoption of AI and other technologies and to provide affordable, customized solutions adapted to the realities of SMEs.

> *Mission 4 defines two interconnected objectives: to digitally transform 25% of Brazilian industrial companies by 2026, strengthening national production in emerging technology sectors; and to expand the digital transformation of 50% of companies by 2033, through the adoption of key technologies.*

2.4. Evgeny Osadchuk, Director of the Artificial Intelligence Department of Digital Economy (ANO), Russia

Mr. Osadchuk presented the initiatives on AI development for SMEs in Russia implemented by the Digital Economy (ANO), outlining the

government's strategic framework for a national AI strategy through 2030. He highlighted key phases focused on research and applications that aim to transform industries and optimize key processes, showcasing success stories like a 30% sales increase in retail sales due to AI adoption. Mr. Osadchuk emphasized the need for equitable AI implementation across BRICS countries, advocating for technology transfer, sharing best practices, and establishing ethical standards, while underscoring the importance of ensuring AI development benefits people and enhances efficiency in critical sectors.

> *The BRICS have to pay attention to the specificities of SMEs in AI. Bringing in best practices, transferring this technology, and developing it.*

2.5. Denis Bruno Viríssimo, AI & Analytics Manager, Institute for Technological Research (IPT), Brazil

Mr. Viríssimo highlighted the significant impact of disruptive AI on global competitiveness and the economy of SMEs, potentially adding up to USD 15.7 trillion to the global economy by 2030. The transition of SMEs into the digital economy and how they can strategically adopt AI were also topics covered, highlighting that AI can enhance decision-making, reduce costs, and drive innovation, enabling new business models. Finally, he introduced the concept of an "AI package," which encompasses technological components, professional skills, and a strategic vision for effective implementation.

> *AI systems generate new opportunities, not only for existing markets, but also by creating new markets and new players that internally can help increase economic activity and also the well-being of the global economy as a whole. These new business models can lead to a more sophisticated level of customization and personalization, which is a great opportunity for SMEs.*

Panel 2: Digital Skills for the Future: Building Capacities for AI Integration

This panel examined the essential need for upskilling and workforce development to ensure that SMEs are prepared for the digital economy. The discussion focused on developing the digital competencies needed for successful AI adoption, while also sharing some main challenges faced by the BRICS countries and concrete programs and initiatives designed to equip workers with digital tools, including AI.

The panelists emphasized the importance of aligning both basic education and specialized training with SME digital transformation agendas. They stressed that digital upskilling must be continuous, accessible, practical, and tailored to adult learners, focusing on replacing outdated skills and fostering adaptability in a rapidly evolving technological landscape.

Several national and international programs were presented as successful models for enabling AI adoption through skill development and coordinated actions. These included university certifications and sector-specific courses in Brazil and India, collaborative training networks in Russia, and UNIDO-led hubs in China. Yet, the panelists also stressed that structural barriers still hinder the potential for SMEs to fully benefit from digital transformation, such as limited access to infrastructure, low digital readiness, and cultural resistance to change.

1. Key Points

1.1. The Role of Both Basic Education and Specialized Professional Training in Supporting Digital Transformation

Basic education and specialized professional training are vital for supporting digital transformation among SMEs in the BRICS nations. In this context, the success of digital transformation relies not only on acquiring new skills but also on "deskilling" outdated competencies to align with the evolving job market. Nevertheless, the pervasive lack of digital skills and literacy remains a significant challenge that prevents SMEs from adopting and benefiting from cloud computing, AI, and cybersecurity technologies. To tackle this issue, according to the speakers, training must be accessible, continuous, and tailored to adult learners. To achieve this, it is essential to shift away from traditional lectures toward more practical and dynamic methodologies, foster human creativity while automating repetitive tasks, and equip workers and businesses with knowledge of AI

and related technologies to leverage and enhance resilience, innovation, and productivity.

Initiatives such as India's large-scale training program for 75 million people and similar efforts carried out in China demonstrate how extensive upskilling can help reverse low digital proficiency levels, particularly when these initiatives include training multipliers.

> *Digital transformation and AI are no longer official. They are opportunities for resilience. [...] SMEs need to develop these digital skills, including technical issues, the use of technology and even the notion of continuing to learn, knowing that technology is going to change rapidly from now on, requiring us to adapt constantly, and [...] knowing that [SMEs] are the backbone of the BRICS countries.*
>
> Ana Paula Nishio, Chief of Digital Transformation and Artificial Intelligence (UNIDO)

1.2. Programs and Initiatives Designed to Equip Workers With Digital Skills for AI Adoption

Various programs and initiatives aimed at developing digital skills reportedly enhanced the effective adoption of AI among SME workers in the BRICS countries.

In India, digital and media literacy courses applied to sectors such as agriculture and manufacturing have been essential in preparing companies and workers for the AI era. Meanwhile, in Brazil, academic certifications and university programs in AI and software engineering stand out, including the AI certification offered at the Federal Institute of Goiás (IFG) and the Center of Excellence in AI's efforts, which support over 60 companies using a methodology called "Easy AI." Partnerships with institutions like SEBRAE also provide accessible courses in Portuguese, strengthening the digital foundation of SMEs.

UNIDO has also established hubs of excellence in China and other countries to assist with digital transformation in the BRICS. Lastly, in Russia, the Association of AI Laboratories (AILA) coordinates 230 research teams and has developed a collaborative approach to training AI professionals, including intensive programs aimed at strategic sectors. Additionally, a new generation of specialists, such as lawyers, is being trained to handle the legal and regulatory aspects of AI, reflecting the need for professional profiles that are aligned with technological transformations.

1.3. The Impact of Upskilling on SME Success and Long-Term Growth

The continuous improvement of digital skills directly affects the success and long-term growth of SMEs in BRICS countries. According to several speakers, neglecting the development of AI solutions for small businesses restricts their growth potential, while training in AI enables these companies to enhance operational efficiency and the capacity for innovation, adapting more swiftly to market changes. They enhance their consumer experience, while analyzing market trends more accurately, demonstrating greater competitiveness, and increasing their resilience. Lastly, upskilling prevents the professional obsolescence of SMEs, narrows skills gaps, and broadens development opportunities.

Cases like Russia's illustrate that companies with AI-trained professionals can achieve productivity gains of up to 30% (for example, in the Human Resources sector), emphasizing the strategic importance of digital reskilling in transforming the internal dynamics of SMEs and ensuring that AI can serve as an ally rather than a threat to employment.

1.4. Main Challenges Faced by BRICS Countries

The BRICS countries face a series of structural and cultural challenges that hinder the full adoption of digital transformation and AI by SMEs and hamper the progress of digitalization.

In financial, economic, and market terms, challenges are linked to budget constraints and resource limitations, including a shortage of time and resources for training. Additionally, limited market access and the concentration of technological development within large corporations may prevent SMEs from reaping the benefits of innovation.

In terms of technological resources, there is limited connectivity, poor technological infrastructure, and low digital readiness levels, all of which significantly impede SMEs' ability to adopt new technologies.

Furthermore, inclusive, tailored, and harmonized policies are inadequate. They are essential for ensuring fair competition and promoting the adoption of inclusive AI. Moreover, the lack of coordination between governments, universities, and industries hinders the potential of AI.

Regarding skills and knowledge, there is a lack of professional competencies and insufficient awareness of AI benefits, which hinders prioritizing this learning. This results from cultural resistance to change among entrepreneurs and workers and a low level of digital maturity. Additionally, training programs lack ongoing support and practical

methodologies specific to the SME context. Lastly, several ethical risks, along with technical and financial challenges, require a cautious and balanced strategy.

In Brazil, for instance, high costs, the complexity of implementation, and a shortage of skilled labor are significant barriers to digitalization.

2. Speakers Report

2.1. Alexandre Barbosa, Head of the Regional Center for Studies on the Development of the Information Society (Cetic.br) at the Brazilian Network Information Center (NIC.br), Brazil

Mr. Barbosa moderated the discussion and highlighted the critical role of digital skills as essential drivers for the digital transformation of SMEs in BRICS countries. Emerging technologies, including AI and digital platforms, can serve as supplementary tools and vital components, helping these businesses remain competitive and sustainable. Mr. Barbosa emphasized the need for capacity-building and ongoing learning to enable SMEs to fully leverage these technological opportunities. The importance of international collaboration was also underscored, and developing appropriate policies and sharing experiences between BRICS countries are crucial for addressing the challenges of technology adoption. During the panel discussion, the significance of digital infrastructure, robust connectivity, and the need for practical training and qualification programs were also highlighted as key issues.

2.2. Basheerhamad Shadrach, Director of the Commonwealth Educational Media Centre for Asia, Commonwealth of Learning, India

Mr. Shadrach emphasized the crucial role of SMEs, which make up 89% of the workforce and contribute 50% to national economies. However, they encounter challenges such as budget constraints, a lack of digital skills, cybersecurity issues, and resistance to change. These challenges limit the adoption of AI despite its advantages, including operational efficiency, trend analysis, and consumer experience. He argued for preserving human creativity and advocating for AI to handle repetitive tasks while humans maintain control over analytical and creative processes. Additionally, Mr. Shadrach stressed the need for BRICS countries to adopt AI inclusively, ensuring access to affordable solutions, technical training, data security, and resource sharing.

> *In India, we provide education and capacity-building opportunities for family businesses and SMEs from digital literacy to improving job skills in agriculture [...]. We are also working with many universities, especially the open school systems and universities that help the manufacturing, automotive, agricultural sectors and those who also own large and small enterprises in the country, so that everyone is part of this lifelong learning project.*

2.3. Celso Camilo, Co-founder of Artificial Intelligence Center of Excellence, UFG (Federal University of Goiás, Brazil)

Mr. Camilo emphasized that the digital transformation of SMEs is primarily a cultural shift rather than a technological one. The importance of digital literacy and accessible training was highlighted, revealing that many companies lack familiarity with key concepts such as cloud computing, AI, and cybersecurity, which hinders their adoption of technology. He proposed tailored methodologies, user-friendly tools, and ongoing support to address this. Mr. Camilo mentioned Brazilian initiatives, including academic certifications and AI programs, such as the IFG (Instituto Federal de Goiás) AI certification. Its Center of Excellence in AI, backed by 700 researchers, assists over 60 companies in identifying needs and implementing digital solutions through the "AI Fácil" (Easy AI) methodology, facilitating gradual technology adoption based on the company's maturity. The primary challenge remains access to information and the application of practical knowledge, which, if unaddressed, will perpetuate the low digital maturity of SMEs and hinder their competitiveness.

2.4. Juan Ivan Martín Lataix, Skills Digitalisation Specialist, International Labour Organization (ILO)

Mr. Martin Lataix highlighted the importance of SMEs in the global economy and reinforced that digital transformation requires continuous workforce training. For example, cloud computing and large language models (LLMs) can increase productivity, but their adoption depends on connectivity, technological infrastructure, and public policies. The lack of time and resources prevents many SMEs from investing in digital training, which affects their competitiveness, which was also one of the key points. Examples from India and China show that massive training programs can reverse this scenario. In India, for example, an initiative between 2017 and 2018 reached

75 million people and served as a model for other emerging economies. Therefore, governments must ensure that people develop digital skills to keep up with market transformations. Mr. Martin Lataix also warned that, without quick action, talent will be wasted, and SMEs will miss opportunities for innovation and growth. Furthermore, he emphasized the need for inclusive policies, public-private partnerships, and adapted regulations to ensure balanced access to digital resources and data protection.

> *It is important to integrate digital skills with a digital development agenda that should be prioritized. Legislators and countries need to develop these strategic goals, not just by copying and pasting from others, but by adapting to their own realities. This will translate into actions in which medium and small companies will have incentives and a digital transformation strategy.*

2.5. Ana Paula Nishio, Chief of Digital Transformation and Artificial Intelligence (UNIDO)

Ms. Nishio presented the work of UNIDO, the UN agency focused on industrial development, highlighting that digital transformation and AI are opportunities to strengthen the resilience and growth of SMEs in the BRICS countries. However, barriers such as limited connectivity and insufficient digital education still hinder the adoption of these technologies. Initiatives such as hubs of excellence in China, partnerships with SEBRAE in Brazil, and programs in Latin America were mentioned as examples that aim to boost the digitalization of SMEs. Ms. Nishio highlighted that AI impacts all professions, requiring new, more practical, dynamic learning models. Ms. Nishio advocated for replacing traditional methods, such as lectures and long courses, with approaches that integrate SMEs' everyday needs, making training more efficient and accessible.

2.6. Robert Vasiliev, Deputy Director of the Artificial Intelligence Laboratories Association (AILA), Head and Founder of the Applied AI lab Z-union. Russia

Mr. Vasiliev presented the Russian experience in implementing AI and how this approach can be replicated in the BRICS countries. He highlighted that AI is transforming several professions and that Russia has developed a collaborative approach to training, with 230 research teams

in the Association of AI Laboratories (AILA). The focus is on integrating AI into the workforce and offering practical courses targeted at sectors such as marketing and recruitment. Mr. Vasiliev emphasized the need to train specialized professionals, such as lawyers, and presented data estimating a 30% productivity gain in sectors like human resources and engineering. Mr. Vasiliev reinforced that the effective adoption of AI requires multistakeholder coordination between the government, academia, and industry. He stated that Russia is open to sharing its experience and technology with the BRICS countries. He concluded by emphasizing that AI should be seen as a human-assisted tool, with decision-making always centered on people.

Webinar 2: Market Access and Internationalization for BRICS SMEs

Panel 1: E-Commerce and SMEs in the BRICS

The panel examined how SMEs in BRICS countries can utilize e-commerce strategies to address challenges, expand their market reach, and remain competitive in the global market. To show how this can be achieved, the panel shared concrete examples of policies and initiatives from the private sector and successful e-commerce strategies in BRICS countries.

Panelists highlighted that while many SMEs remain in the early stages of digitalization, often relying on social media rather than dedicated platforms, there is an increasing interest in AI tools to optimize marketing, logistics, and customer engagement. Structural and cultural barriers, such as inadequate infrastructure, regulatory hurdles, and limited digital literacy, continue to slow progress. However, partnerships with technology providers and fintech companies are emerging as effective ways to bridge these gaps and drive innovation.

Examples from across the BRICS show how targeted policies, digital infrastructure investments, and private-sector initiatives are helping SMEs overcome these obstacles and expand their e-commerce capabilities. Programs such as China's Taobao Villages and Brazil's ApexBrasil showcase the impact of combining training, funding, and international partnerships. Cross-border initiatives and digital upskilling, particularly those focused on inclusion and export readiness, are helping SMEs connect with global markets, enhance their competitiveness, and effectively expand their digital presence.

1. Key Points

1.1. Trends and Challenges in Adopting AI Tools for E-Commerce in the SME sector

The adoption of AI tools in e-commerce by SMEs in the BRICS countries faces several structural, technical, and cultural challenges, including logistical difficulties, regulatory barriers, and inadequate technological infrastructure. Furthermore, there is a general lack of technical knowledge, specialization, and digital literacy, as well as an absence of a digital export culture. Many SMEs are still in the early stages of digitalization, primarily using social networks rather than their own websites.

In some jurisdictions, such as those in Latin America and Egypt, issues like power outages, low consumer confidence, and competition from large international players also exacerbate the situation.

Despite these challenges, there are growing trends for SMEs to adopt AI to optimize marketing, logistics, and communication. These trends are more successful, especially when supported by strategic partnerships with technology providers and other tech companies, such as fintechs.

1.2. Successful E-Commerce Strategies in the BRICS Countries

In the BRICS countries, successful e-commerce strategies are closely tied to training and the effective use of emerging technologies, as well as investments in digital infrastructure and the development of strategic partnerships, particularly those aimed at achieving an international reach.

Additionally, utilizing social media and other digital platforms can significantly contribute to reaching new markets, customizing products and services, and improving communication, while reducing costs, increasing visibility, and enhancing the evidence-based decision-making process.

> *In the Taobao Villages [program, Alibaba,] in partnership with the local government, this program trained and empowered smallholder farmers, particularly in the western region of mainland China, to sell within the digital economy and generate income without intermediaries.*
>
> **Felipe Daud, Director of Government Relations, Alibaba**

1.3. Insights on BRICS Government Policies and Private Sector Initiatives Enabling SMEs to Embrace AI in E-Commerce

Initiatives such as cross-border e-commerce and specific financing programs stand out, as does the proposal for unified digital regulations within the BRICS framework. Some concrete experiences from Egypt, Brazil, and China were also shared.

Egypt, for example, has invested over 100 billion Egyptian pounds in telecommunications, resulting in more than a 15-fold increase in Internet speed, which has improved access to e commerce. Meanwhile, Brazil stands out for its swift adoption of technology. In 2024, 12.7 billion e-commerce transactions were recorded, driven by advances in payment systems and initiatives like ApexBrasil's digital training programs.

In the private sector, China also had a success story with the "Taobao Villages" program. This effort, recognized by the World Bank, works in collaboration with local governments and has enabled farmers to sell online through Alibaba, increasing their incomes more than tenfold.

In Brazil, ApexBrasil has operated since 2017 with a program structured around three pillars: education, opportunities, and financial support. This includes grants of up to R$ 40,000 and partnerships with platforms such as Amazon and Alibaba. More than 700 companies have participated in these programs, with around 100 already running digital stores. ApexBrasil's international missions, such as the one planned for June 2025 with 20 Brazilian companies at B2B events, also strengthen the digital and international presence of the country's SMEs. Although Brazil still faces challenges related to its low digital export culture, these collaborations demonstrate concrete progress.

Lastly, experiences like UNCTAD's exchange of women digital entrepreneurs visiting China reveal the importance of practical and inspiring programs that connect SMEs to innovation ecosystems.

> *Egyptian SMEs themselves are also on these [major] e-commerce platforms [such as Alibaba and Amazon]. In other words, they have also started exporting their products and services through these important platforms. And this has helped SMEs to reach regional and global markets by exporting their products and services.*
>
> Nagwa Ebrahim El-Shenawy, Professor at Cairo University and Advisor at the Ministry of Communications, Egypt

2. Speakers Report

2.1. Luciana Mancini, Special Advisor to the Minister on International Affairs and Chair of the BRICS SME Working Group, Brazilian Presidency of BRICS 2025

Ms. Mancini opened the panel by emphasizing the importance of SMEs as key players in fostering inclusive economic growth within the BRICS, highlighting the challenges these businesses face in accessing new markets and undergoing internationalization, and noting the regulatory, legislative, and structural barriers that impede their competitiveness and scalability. Digital transformation, particularly through the use of AI, is considered

essential for enhancing the international presence of SMEs. However, it continues to face obstacles, such as insufficient technical training and digital literacy gaps. She highlighted the need for coordinated action among BRICS countries to create a more favorable environment for SMEs, characterized by harmonized regulatory policies, improved technological infrastructure, and accessible financing mechanisms. Ms. Mancini advocated for concrete measures such as bolstering cross-border e-commerce, fostering knowledge exchange, and developing a strategic digital mindset in SMEs. In conclusion, she emphasized the urgency of change and a commitment to actionable and collaborative strategies that genuinely empower SMEs globally.

> *Cross-border transactions still remain very complex due to regulatory fragmentation, legislative restrictions, and other gaps in this landscape. If we want to leverage sustainable economic development, we need to equip our SMEs with the tools, policies, and networks they need to succeed on the international stage. [...] To reach this international market, the BRICS markets need to understand logistics and technology and search for a new competitive framework. SMEs need mentoring, training, and strategic partnerships to navigate the other markets successfully.*

2.2. Torbjörn Fredriksson, Head of E-commerce and Digital Economy Branch, United Nations Conference on Trade and Development (UNCTAD)

Mr. Fredriksson highlighted the increasing adoption of AI by SMEs to personalize services, improve supply chain management, and enhance communication through social media. Data collected by UNCTAD in 2022 indicated that 43 developed and developing economies collectively generated USD 27 trillion in business e-commerce sales by that year. Mr. Fredriksson also noted that online retail is expanding three times faster than traditional retail; however, the penetration of online shopping remains highly uneven across countries. In China, more than two-thirds of the population shops online, compared to less than one-fifth in other countries, including Indonesia and Iran. Mr. Fredriksson also discussed a UNCTAD initiative focused on empowering women digital entrepreneurs that had involved a tour of China for over 30 women business leaders from developing nations, including visits to e-commerce and AI companies. Finally, he emphasized the

need for collaboration among BRICS countries to address challenges such as resource scarcity, infrastructure, and data, as well as the importance of engaging trade support entities to help SMEs enter international markets.

> *In many BRICS countries, there are many resource constraints and a lack of data, but even so, a large number of BRICS countries are adopting AI to compete on a global or regional level. Success stories highlight globalized solutions, partnerships with technology providers, and the integration of AI. One way to help SMEs access strategic resources could be to leverage various fintech solutions and other financing bridges, which is usually a sector with few options for SMEs.*

2.3. Nagwa Ebrahim El-Shenawy, Professor at Cairo University and Advisor at the Ministry of Communications, Egypt

Ms. El-Shenawy highlighted the rapid growth of e-commerce in Egypt, driven by the widespread penetration of cell phones (97%) and Internet access (over 70%) and the intense use of social media by approximately 45 million users. SMEs account for 90% of Egyptian companies and 75% of the workforce, making them crucial to the national economy. Despite these opportunities, SMEs face challenges such as limited digital skills, logistical issues, low consumer confidence online, and competition from large global companies.

The Egyptian government has made significant investments in telecommunications infrastructure and enacted supportive legislation, allocating 100 billion Egyptian pounds (approximately USD 2 billion) over the past two years, with 70% of the funding coming from the private sector. Ms. El-Shenawy also emphasized the importance of AI and digital tools for internationalization and the need for continuous training and cross-sector coordination. She noted that many SMEs use social networks as their primary sales channel. Finally, she advocated for including Egypt in the BRICS to enhance trade and internationalization opportunities.

> *The main challenge that the BRICS countries have in developing skills for e-commerce is the complexity of international trade, including customs and rules and regulations. We must study all this to promote exports, e-commerce, and digital trade between the countries.*

2.4. Felipe Daud, Director of Government Relations, Alibaba

Mr. Daud shared Alibaba's experience as one of the largest global e-commerce platforms. He highlighted how the company has supported the inclusion of SMEs in digital commerce, especially in China, through programs such as "Alibaba Taobao Villages," which has empowered farmers to sell online, increasing their incomes by more than ten times. He discussed the export difficulties faced by Latin American and Brazilian SMEs, stressing the importance of fostering a digital export culture. He also highlighted the importance of reducing the number of intermediaries in e-commerce and the potential of digital platforms for connecting small producers directly with end consumers, as well as the importance of collaboration between governments and companies in developing inclusive digital ecosystems.

> *In China, Alibaba was founded in 1999, and over the years, it became clear that collaboration with the government, at both the federal and provincial levels, was possible to create a robust digital ecosystem that is now well established in the country. We began developing training programs, one of which is called Taobao Villages. In partnership with the local government, this program trained and empowered smallholder farmers, particularly in western mainland China, to sell within the digital economy and generate income without intermediaries.*

2.5. Clarissa Furtado, Competitiveness Manager at the Brazilian Trade and Investment Promotion Agency (ApexBrasil)

Ms. Furtado highlighted ApexBrasil's role in supporting the internationalization of Brazilian SMEs through digital trade and in helping SMEs overcome challenges such as limited access to technological resources, logistical difficulties, and a lack of strategic partners. Various ApexBrasil initiatives were presented, including training, acceleration, and subsidy programs and international events focused on e-commerce and market intelligence. Lastly, digital commerce was presented as a major global growth opportunity for SMEs, especially with coordinated support from the government, businesses, and private partners.

> *Digital commerce is growing worldwide. E-commerce aligns closely with digital transformation, increased international Internet access, and evolving consumer habits. In the last 5 years, we have already reached USD 11 trillion at an annual rate of 14.1%, and this trend is expected to continue at 10.7% per year until 2029. However, only a fraction of these transactions involves international purchases of goods. [...] The Brazilian domestic market, for example, has experienced improvements in infrastructure and innovation, such as its payment systems, and leads the region.*

Panel 2: Fostering Digital Policies and Internationalization for SMEs

This panel examined the role of digital policies, governance frameworks, and AI tools in enabling SMEs to expand into new markets and thrive both locally and internationally. Concrete case studies were shared, along with insights on how digital transformation, including the use of AI, can foster inclusivity and facilitate the internationalization of SMEs within the BRICS region and beyond.

Panelists emphasized the necessity for harmonized digital policies and regulatory frameworks across BRICS countries to reduce compliance burdens and unlock cross-border opportunities for SMEs. Proposals included mutual recognition of digital signatures, interconnected payment systems, and international sandboxes for AI testing, aiming to create a more predictable environment for SMEs to scale internationally. Practical examples, such as partnerships between firms like those using cloud-based ERP (enterprise resource planning) tools and regulatory bodies, demonstrate how collaboration can simplify market access and support digital transformation.

Digital tools, particularly AI and cloud-based ERP systems, are accelerating the internationalization of SMEs by streamlining operations, enabling predictive analytics, and enhancing regulatory compliance. Case studies illustrated real-world impact, from increased revenues in Latin America to reduced reporting errors in Southeast Asia. Platforms like the ITC's Global Trade Helpdesk have also proven instrumental in equipping SMEs with accessible, multilingual trade intelligence. These examples shared by the panelists highlight how strategic partnerships, targeted digital policies, and scalable technologies are reshaping the global potential of SMEs across the BRICS region.

1. Key Points

1.1. Insights on BRICS Government Policies and Private Sector Initiatives Enabling SMEs to Embrace AI in E-Commerce

The diversity of national and regional regulations increases compliance costs and imposes significant barriers to the internationalization of SMEs. To address these challenges, the development of a common regulatory framework is proposed. This could include transnational tax processes, sandboxes for testing technologies such as AI in secure and flexible environments, mutual recognition of electronic signatures, interconnection of digital payment systems, and, more broadly, shared international standards.

Organizations such as the ITC have supported these efforts through studies aimed at standardization and regulatory interoperability. Additionally, concrete experiences, such as those promoted by Kingdee International Software Group in partnership with regulatory authorities, demonstrate that collaboration between countries can alleviate the obstacles posed by fragmented regulations, providing SMEs with a more predictable and reliable environment for international expansion.

1.2. The Role of AI and Digital Tools in Expanding SMEs into New Markets

AI has offered solutions that automate processes, reduce operating costs, and increase the efficiency of SMEs. Practical applications range from customer service, logistics, production, and real-time planning to predictive analytics for inventory and supply management, to conducting market research. AI is also used to personalize access to trade information and automate translations.

Cloud-based ERP tools like Kingdee's facilitate regulatory compliance and supply chain management while promoting scalability and integration with various systems. One example mentioned is an AI-based forecasting product launched in November, which is already available in 30 countries, demonstrating the speed and effectiveness of digitalization in the internationalization process of SMEs.

Large language models have also shown potential; however, robust databases are emphasized to avoid hallucinations and ensure safe business decisions. Cases such as Philippine SMEs in the gaming sector, supported by international partners, or the growing digital exchange between China and India illustrate how the strategic adoption of these technologies, combined with global partnerships, can boost the growth of SMEs within the BRICS digital ecosystem.

1.3. Case Studies or Examples of Successful SME Internationalization through Digital Strategies

The software group Kingdee mentioned some examples of success, such as an e-commerce SME in Latin America that integrated Kingdee's system, and achieved a 40% increase in revenue due to the facilitation of international payments. In Southeast Asia, the same platform reduced reporting errors by 16%, demonstrating concrete operational gains with digital solutions. In Brazil, SMEs in the logistics sector expanded regionally by adopting an AI-based ERP system that ensured compliance with local tax rules.

Other examples reinforce the role of collaborative networks and digital platforms in overcoming trade barriers. The International Trade Centre's Global Trade Helpdesk platform, which has more than 1 million users annually and is available in 8 languages, including Portuguese, has been essential for SMEs to access data on tariffs, requirements, logistics, and payments.

The experience of an Indonesian exporter, who used ITC's system to resolve AI inconsistencies in the search for export tariffs to India, illustrates the value of data curation. In addition, examples such as Philippines SMEs in the gaming sector, with Japanese support, and the strengthening of digital trade between India and China, highlight how strategic partnerships and favorable policies can accelerate the international growth of SMEs.

2. Speakers Report

2.1. Quan Zhao, Trade Policy Advisor, International Trade Centre (ITC)

Mr. Zhao highlighted the essential role of regulatory harmonization in creating a more predictable and accessible digital environment for SMEs in the BRICS countries, which accounted for 30% of ICT exports in 2021 and 11% of global digital services exports, according to the ITC-UNCTAD "BRICS Digital Economy Report 2020." The regulatory gaps in areas such as digital authentication, data protection, and platform governance were considered to be hindrances to the full progress of digital transformation. The International Trade Centre supports regulatory review in the BRICS, including initiatives to standardize digital documents and integrate systems. Mr. Zhao also highlighted the potential of AI and digital services as drivers for the internationalization of SMEs, citing practical examples such as the use of AI in e-commerce and digitally delivered services. Finally, he highlighted the importance of addressing legal liability in AI-automated services and the regulation of AI activities.

2.2. Mathieu Loridan, Senior Market Analyst, Global Trade Helpdesk, International Trade Centre (ITC)

Mr. Loridan highlighted how AI can boost the internationalization of SMEs, particularly by personalizing access to trade information. He spoke about the Global Trade Help Desk, a digital platform created in 2020 by ITC in partnership with eight organizations, including the Portuguese version developed in collaboration with ApexBrasil, which the G20 has already recognized. This platform aims to simplify market research for SMEs by consolidating relevant trade data. Mr. Loridan also emphasized that although AI can unlock service and trade opportunities, reduce costs, facilitate regulatory compliance, and automate logistics and customer experience, there are still limitations regarding pricing and the available models, such as inconsistencies in the results of tariffs and trade agreements. Therefore, it is essential to develop reliable databases and strategies to minimize the risks of AI hallucinations . He concluded by advocating for the use of AI to make trade more accessible and efficient for SMEs in the BRICS.

> *By automating logistics, customs clearance, and compliance processes, AI significantly lowers the time and costs associated with moving goods across borders. […] By boosting productivity, especially in sectors like consulting, education, finance, and customer service, AI allows firms to offer competitive digital services globally.*

2.3. Benno Weissner, Chair, Digital Sector Group at the Enterprise Europe Network

Mr. Weissner highlighted the work of the Enterprise Europe Network in supporting the internationalization and digital transformation of SMEs through its collaborative ecosystem, which is present in over 60 countries. He stressed the importance of partnerships, support networks, and tools such as help desks for understanding regulations and testing digital solutions before making significant investments. Mr. Weissner also noted rapid advances in technologies like generative AI, emphasized the significance of personalization and individualized communication with SMEs, and shared insights from the Hanover Fair in Germany and success stories involving internationalized digital solutions in the short term.

> *[To leverage digital transformation as a driver for internationalization among companies], it is important to have a cohesive network. We have many rules to comply with, but it's essential to verify regional and national regulations, as they differ. Establishing this network allows individuals to connect and collaborate effectively.*

2.4. Liu Yujie & Yu Zhifang, Kingdee International Software Group, China

Mr. Yujie and Ms. Zhifang presented Kingdee's experience in supporting the digital transformation and internationalization of SMEs through AI-based technologies and cloud-based ERP platforms. They highlighted the importance of regulatory harmonization among BRICS countries and the role of digital tools in reducing costs and increasing efficiency. They shared concrete success stories, such as a 16% reduction in reporting errors in Southeast Asia and a 40% increase in revenue for an e-commerce SME in Latin America. They stressed the urgent need to create integrated ecosystems that combine technology, regulation, and global partners, enabling SMEs to grow in a scalable and secure manner within the international digital landscape.

> *Some insights and experiences our company has gained from previous encounters: [...] First, harmonizing digital regulation. The greater the barriers for SMEs seeking to go global and the inconsistencies in digital policies across borders, such as the Data Protection Act, the higher the compliance costs and relational risks. [...] Secondly, [...] digital tools reduce costs and unlock new markets.*
>
> Liu Yujie, Kingdee International Software Group, China

Roundtable: BRICS Perspectives on SME Digital Transformation

This roundtable examined the successful national approaches and collaborative opportunities among BRICS countries to overcome challenges in market access and digital adoption while supporting SME digital transformation.

Addressing structural inequalities, panelists noted that digital tools, especially AI, can help bridge gaps in market data, infrastructure, and financial access. Brazil presented the Plataforma Brasil Exportação, a public-private export service hub supported by the UK, alongside AI-powered government tools like Acesse o Mundo and COMEX Responde . Russia's SME.RF Digital Platform centralizes services for over a million SMEs, enabling business matchmaking and large-scale visibility. India emphasized its Udyam Assist Platform, which formalizes over 62 million SMEs, and the TEAM platform, which supports digital empowerment, particularly for women-led businesses. China's ongoing action plan and data-driven indicators already benefit hundreds of thousands of SMEs, while South Africa prioritizes rural connectivity, digital identity, and local production. UNIDO's BCIC platform connects BRICS industrial hubs, providing tailored digital services for the global integration of SMEs.

Brazil highlighted the potential of AI to automate information and promote inclusion. Russia's digital platforms reduce bureaucracy and improve SME awareness of state programs. China leverages transactional data and training to support business supervision and expansion. South Africa tackles digital adoption barriers through digital hubs and public-private partnerships. Collaborative opportunities were also explored, with countries like Brazil and Russia proposing joint platforms and India advocating for shared best practices in fintech and cybersecurity. China's scalable models and South Africa's incubator networks point toward deeper BRICS-wide integration.

1. Key Points

1.1. Successful National Approaches to Supporting SME Digital Transformation

Brazil highlighted the Brazilian Export Platform (Plataforma Brasil Exportação), created in 2023 with support from the UK and managed by ApexBrasil, which integrates public and private services aimed at exports. Complementing this strategy, tools on the government platforms Acesse

o Mundo and COMEX Responde offer self-assessment of export maturity and automated answers with AI to questions about foreign trade.

In Russia, the state-run Business Partnership Platform on the SME.RF Digital Platform , launched in 2022, brings together more than 1 million SMEs. It offers more than 30 services, including automatic business profiles and functionality for industrial and corporate contributions, allowing companies to offer their products to large buyers.

In India, the digital policy initiated in 2015 has established a support infrastructure with the Udyam Assist Platform for formalizing SMEs, which has already registered more than 62 million. In addition, India leads the world in digital transactions, with over 45% of global transactions, which boosts formalization and market access. The Trade Enablement and Marketing (TEAM) platform, created by the Indian government with the support of the World Bank, offers empowerment for SMEs with digital tools and guidance to utilize the e-commerce marketplace, effectively focusing on women-led businesses.

China has also implemented an action plan that is expected to benefit more than 40,000 SMEs between 2023 and 2025. The plan has already distributed digitalization indicators to more than 200,000 SMEs.

Additionally, South Africa emphasized connectivity in remote areas, focusing on AI, e commerce, and cybersecurity, while also implementing policies to encourage local production and digitize informal businesses.

Finally, UNIDO presented the BCIC (BRICS Centre for Industrial Competencies) platform, which connects BRICS industrial competencies centers to offer training and personalized services to industrial SMEs, promoting their digitalization and global expansion.

1.2. Overcoming Regional Challenges in Market Access and Digital Adoption

In Brazil, the lack of market data, logistics, and financial resources creates an uneven environment, while AI can help balance this by automating information. Overcoming unequal access is one of the key challenges, and inclusion can also be promoted through events and institutional arrangements that promote diversity.

Russia seeks to tackle SMEs' low awareness of public policies with the TEAM platform, a state digital platform that centralizes services and automates data, speeding up access and reducing bureaucracy.

In China, efforts focus on mobilizing financial resources, providing periodic training, and offering support via a digital platform. They emphasize the use of transactional data in systems such as Ele.me, which facilitate the supervision and management of SMEs.

In South Africa, the main obstacles include the high cost of digital adoption, poor infrastructure, low Internet quality, digital skills gaps, and cybersecurity challenges. The strategic response involves digital hubs, digital identity, and industrial modernization, supported by public-private partnerships.

UNIDO, through the BCIC platform, offers customized plans for digitalization and innovation, promoting automated connections with buyers and partners via AI matchmaking. This supports SMEs in overcoming these barriers smartly and in a scalable way.

1.3. Collaborative Opportunities within BRICS to Foster SME Growth

Brazil cited its partnership with the United Kingdom in creating the Brazilian Export Platform, suggesting the possibility of similar actions within BRICS and other countries. Meanwhile, Russia proposed utilizing its state platform to foster industrial cooperation and support individual SME projects, including those in supply chains.

India emphasized the sharing of best practices in AI, fintech, and cybersecurity, proposing the creation of interconnected systems for data exchange among countries. Additionally, their TEAM platform was created with the support of the World Bank.

China reaffirmed its commitment to jointly promoting the digital transformation of SMEs in the BRICS, highlighting its experience in structuring plans, standardizing processes, and scaling successful practices as a reference for multilateral collaboration. South Africa mentioned initiatives underway with other members, such as innovation hub networks, virtual incubators, and shared sandbox environments.

Technological cooperation with China and Russia, particularly in fintech, cybersecurity, and the automotive industry, was considered strategic. UNIDO is promoting the establishment of a collaborative hub via the BRICS Centre for Industrial Competencies (BCIC), which was launched right after the webinar.

2. Speakers Report

2.1. Brazil – Paulo Guerrero, Deputy Director for Trade Promotion and Facilitation, Ministry of Development, Industry and Commerce of Brazil (MDIC)

Mr. Guerrero highlighted the transformative role of AI in internationalizing SMEs, especially its impact on operational efficiency and innovation. He

noted associated regulatory challenges of tackling issues such as cybercrime, data protection, and intellectual property, while strengthening the need for regulators to find a balance that promotes innovation without compromising safety. Some Brazilian government initiatives were presented, including the development of an AI-based solution to automatically answer general inquiries on trade and the Brazil Export Platform, developed with UK support and operated by ApexBrasil to connect companies with services that can support their journey into international trade. Mr. Guerrero also mentioned the "Access the World" tool, which assesses a company's level of export maturity, and emphasized the importance of international marketplaces and inclusive actions in helping SMEs access the global market.

> *The transformative role of AI in business is unquestionable. With AI, companies can access a range of services, develop marketing strategies, and generate new ideas. This enhances operational efficiency while also boosting innovation and growth.*

2.2. Russia – Pavel Kondrashov, Head of International Cooperation, Directorate of Russian Small and Medium Business Corporation (RSMB)

Mr. Kondrashov presented Russia's initiatives to support the digital transformation of SMEs, highlighting the state-created МСП.рф Digital Platform , which integrates more than 30 services and already has 1 million users. The platform automates processes using official data and aims to improve communication between the government and businesses by offering customized support to SMEs. He emphasized the role of digital infrastructure in reducing bureaucracy and broadening SME access to support measures. He also highlighted the Industrial Cooperation and Distribution service, which aims to connect suppliers and buyers, including those from around the world. Finally, Mr. Kondrashov proposed three areas for cooperation between the BRICS countries, focusing on: (i) joint use of the Russian platform for connecting businesses; (ii) joint support for SME projects; and (iii) exchange of good practices in the field of SME support policies.

> *We have established a digital platform in Russia that is open for collaboration with BRICS countries. We would therefore like to offer three opportunities for collaboration between Russia and the BRICS countries. Firstly, the use of the digital platform to develop international industrial cooperation among BRICS countries. Secondly, joint support for individual SME business projects, including supply chain assistance, with access to third-world markets. Finally, sharing experiences and best practices in developing digital infrastructure and economic relations of SMEs.*

2.3. India – Sh. Vinamra Mishra, (GA & TP), Ministry of Micro, Small and Medium Enterprises (MSMEs)

Mr. Mishra pointed out that digital transformation is central to India's economic development. The support provided to MSMEs is structured around four main pillars: (i) formalizing SMEs; (ii) access to technology; (iii) access to credit; and (iv) marketing (both domestic and international). India has promoted innovative public policies and various digital public infrastructures (DPIs), such as the Udyam Registration platform, which has registered more than 63 million MSMEs, including 40% that are women-

owned enterprises. Additionally, India stands out for having the world's largest digital payments interface and AI initiatives for resolving commercial disputes, and for considering fintechs, e-commerce platforms, and support for sustainability for MSMEs as key elements of its strategy .

> *We can understand the transformative power of technology and how we can rely on a digital infrastructure that includes AI, fintech, and cybersecurity. [...] This can be achieved through systems that share information, including between BRICS nations, [...] sharing our countries' best practices in the area of digital transformation.*

2.4. China – Li Yuan, Director of the Institute of Information and Communication Technology, Center for International Economic and Technological Cooperation, Ministry of Industry and Information Technology of P.R. China (CIETC, MIIT)

Ms. Li Yuan highlighted the importance of SMEs for innovation and sustainable development in China, emphasizing that they represent 99% of the manufacturing companies in the country and that they have followed the path of digital transformation to strengthen their competitiveness, aided by support policies from the Chinese government, which plans to assist more than 40,000 SMEs in 100 cities. China has adopted a structured approach, including special digital empowerment plans, the creation of digitalization classification standards, the mobilization of financial resources and public services, and capacity-building through training and the sharing of best practices. Finally, Ms. Li Yuan highlighted the role of innovative digital platforms such as the ele.me food delivery platform in supporting the management and marketing of SMEs and reinforced the Chinese government's commitment to collaborating with the other BRICS countries in promoting digital transformation.

> *Our [Chinese] experience shows that digital transformation offers new opportunities for SMEs, improving quality, reducing costs, and innovating businesses.*

2.5. South Africa – Nomfezeko Ntika, Director for Innovation and Digital Business, Department of Small Business Development

Ms. Ntika presented South Africa's strategies for promoting the digital transformation of SMEs, focusing on inclusion, infrastructure, and collaboration with other BRICS countries. She highlighted actions such as subsidies for AI adoption, structuring digital training programs, encouraging green manufacturing, and embracing emerging technologies like blockchain. Some challenges were also addressed, including limited digital infrastructure, high connectivity costs, skills gaps, and vulnerabilities to cybersecurity threats. Finally, Ms. Ntika emphasized opportunities for collaboration through shared incubators, sandbox platforms, and networks among innovation hubs in the BRICS countries. She also highlighted the following factors that are quite critical to fostering joint innovation and growth: the establishment of shared virtual incubation platforms to enable SMEs across BRICS nations access to cross-border mentorship and expertise; the Collaborative Sandbox initiative to allow start-ups to pilot and test innovative solutions within multiple BRICS markets; and access to robust connectivity

> *The main pillars would be to have viable connectivity, promote an optimized payment system, digitize informal businesses, leverage platforms and strengthen protection and privacy frameworks, bringing greater credibility to SMEs in the BRICS countries.*

2.6. UNIDO – Aleksei Savrasov, Industrial Development Officer for Digital Transformation and AI, United Nations Industrial Development Organization (UNIDO)

Mr. Savrasov presented UNIDO's work in supporting the digital transformation of industrial SMEs in the BRICS, highlighting the BRICS Centre for Industrial Competencies (BCIC) initiative as a collaborative platform that connects the network of national industrial competency centers and industrial SMEs across BRICS Plus. This is the UNIDO response to an official request from the BRICS countries, made in the 8th Declaration of the Ministries of Industry, to lead the digital industrial transformation through partnership facilitation, skills development, and customized solutions in digitalization and innovation. The initiative aims to expand SME

access to markets and enhance their scalability with the support of digital tools and AI, and connect those who offer practical industrial solutions with those who need them the most across BRICS Plus.

Recommendations

The following recommendations were derived from a qualitative analysis of all the speeches made during the two webinars, including the four panels and the concluding roundtable. The recommendations are categorized according to the stakeholders responsible for their implementation, specifically the governments of BRICS countries and SMEs, along with joint recommendations regarding their relationship with other stakeholders.

1. For All

1.1. Promote Ethical and Human-Centered Interaction between People and Technologies

Digital transformation must extend beyond technical adoption and focus on human experience. This involves designing systems, platforms, and AI solutions that prioritize usability, accessibility, fairness, ethics, and individual well-being. Effective interaction between humans and technologies should be recognized as a competitive differentiator, allowing SMEs not only to utilize digital tools but also to comprehend and adapt them to various contexts.

1.2. Establish Multisectoral and Inter-Institutional Coordination Mechanisms to Drive Digital Transformation

Governments, the private sector, academia, and international organizations must cooperate to develop the digital ecosystem. Creating forums, consortia, and collaborative governance mechanisms can accelerate the adoption of AI and other technologies, ensuring alignment between public policies, technical advances, and the needs of SMEs. Inter-institutional platforms and initiatives, such as UNIDO's BRICS Centre for Industrial Competencies (BCIC) and other similar initiatives, can strengthen the digital transformation of SMEs in the bloc by sharing expertise and resources, and collaborating in networks to develop scalable solutions tailored to local needs that can be replicated across countries.

1.3. Expand Investments in Digital Infrastructure and Ongoing Training

Investments in connectivity, digital platforms, and innovation centers must go hand in hand with robust training initiatives. This includes training in the use of AI and e-commerce, digital literacy, and specific digital tools. It must also consider the practical demands of SMEs and their limitations in terms of time and resources, given the need to stay current with the market and promote competitiveness in the sector and the economy.

1.4. Encourage Digital Transformation and the Strategic Use of AI and Data for Informed Business Decisions

AI should support decisions based on consumer data, market trends, and operations. This involves everything from systems that provide automated recommendations to human curation mechanisms combined with AI, ensuring the reliability of information and avoiding risks such as information hallucination.

1.5. Encourage Partnerships with Other Sectors, such as Fintech, and Integrated Digital Platforms

SMEs need easier access to credit and financial services, and fintech plays a strategic role in this process. Promoting the creation of platforms that integrate financial services, transactional data, and management solutions can help SMEs scale, prepare for internationalization, and reduce bureaucracy.

1.6. Fostering a Digital Export Culture through E-Commerce is Essential

E-commerce platforms should be recognized as strategic channels for internationalization. Therefore, it is necessary to promote a digital export culture among SMEs, combined with specific training and tools to support their integration into global marketplaces.

1.7. Encouraging International Collaborative Networks and Regulatory Exchange

Strengthening collaborative networks between SMEs and institutions in BRICS countries allows for the exchange of knowledge, regulatory practices,

technological experiences, and solutions to common challenges. Help desks such as the ITC's Global Trade Helpdesk and joint support centers can serve as points of support for regulatory interpretation and harmonization.

1.8. Promote Secure, Reliable, and Interoperable Digital Environments

Digital advancement must be accompanied by cybersecurity and data protection guarantees. Before making large-scale investments, it is essential to invest in digital protection mechanisms, promote good governance practices, and adopt solutions that have been validated through simulations. Additionally, the mutual recognition of digital identities and the standardization of compliance standards among the BRICS countries should be encouraged.

2. For BRICS Countries

2.1. Capacity Building: Promoting Digital Knowledge and Skills

2.1.1.Create national AI training programs with creative and dynamic methodologies. It is essential to develop programs that focus on technical and digital training for adults, with a practical approach, including mentoring and hands-on experiences. These programs should promote the development of new skills (upskilling) and the replacement of obsolete practices (deskilling) to align the workforce with the demands of digital transformation.

2.1.2.Establish multilateral knowledge exchange platforms. Collaboration platforms should be established among BRICS countries to share best practices, content, and experiences related to digital transformation. Initiatives such as technical missions, mentoring, and international immersion programs—like the stand tours promoted by multilateral organizations—are highlighted as effective instruments.

2.1.3.Training talent in emerging technologies to meet global demand. The shortage of professionals trained in AI and digital technologies calls for public policies that aim to develop talent. This involves establishing competency centers, collaborating with international training providers, and integrating digital skills into education systems.

2.2. Regulation: Ethical Standards, Safety, and the Innovation Environment

2.2.1.Harmonize digital policies and create a safe environment for experimentation. Governments should work on harmonizing digital regulations between BRICS countries, creating common standards that facilitate trade and compliance. This includes the development of regulatory sandboxes that allow for controlled experimentation with AI and automation solutions, promoting innovation while ensuring safety.

2.2.2.Develop inclusive regulation that focuses on data protection and local contexts. Regulation must strike a balance between innovation and the safety of privacy, data security, and intellectual property. It is also essential for policies to consider the unique realities of each country, avoiding the simple replication of external models and ensuring that the adopted solutions align with national priorities.

2.2.3.Develop public policies that foster the digitalization of SMEs. Governments should implement specific strategies that facilitate the digital transformation of micro and small businesses. This includes tax incentives, improved access to digital tools, support for innovation, and ethical standards for AI use, ensuring that the benefits of technology are widely and fairly distributed.

2.3. Investment: Creating Infrastructure for SMEs

2.3.1.Investing in digital infrastructure and expanding connectivity in remote areas. Advancing digitalization depends on robust infrastructure. It is necessary to expand access to high-speed Internet, especially in remote areas, through the creation of digital hubs, broadband networks, and technological access centers aimed at SMEs.

2.3.2.Accessible funding mechanisms for SME digitalization to overcome challenges that are linked to budget constraints and resource limitations, including a shortage of time and resources for training.

2.4. International Cooperation and Infrastructure: Inclusion and Access to Digital Transformation

2.4.1.Encourage international partnerships and integrate SMEs into digital supply chains. The BRICS countries should promote joint initiatives to support the internationalization of SMEs. This can occur through

the creation of network structures, acceleration programs focused on e-commerce, and policies that facilitate the entry of SMEs into digital marketplaces and global value chains.

2.4.2.Create collaborative technology centers and public support platforms. It is crucial to establish connected innovation centers among BRICS countries and public platforms that offer integrated digital services, such as access to credit, payment, marketing, and dispute resolution. These structures should also prioritize the inclusion of underrepresented groups, such as women entrepreneurs and small producers.

3. For SMEs

3.1. Capacity-Building: Promoting Digital Skills and Competencies for SMEs

3.1.1.Promote technical training in AI and digital tools. The need to invest in digital team qualification is emphasized, with a focus on practical skills that enable the adoption of AI in SMEs' daily operations. This training should include the strategic use of tools such as cloud computing, automating administrative tasks, and improving customer service, enabling efficiency gains and better utilization of human creativity.

3.1.2.Encourage financial education and technology management programs for SMEs. Many SMEs face challenges in managing the costs and technological complexity of digitalization. Implementing training programs that focus on effective financial management and technological planning is recommended, enabling these companies to make safer and more sustainable choices during the digital transformation process.

3.1.3.Facilitate access to training through partnerships with public and private institutions. Expand access to educational and technological resources through collaborations with educational institutions, public agencies, and digital platforms. SMEs can benefit from government programs and multilateral initiatives that provide courses, mentoring, and certifications in digital and innovation topics.

3.2. Implementation: Practical and Strategic Adoption of Digital Technologies and AI for SMEs

3.2.1.Use AI tools to improve productivity, decisions, and competitiveness. The importance of adopting AI-based solutions to drive

innovation, optimize internal processes, improve decision-making, and reduce costs was highlighted. This includes the use of intelligent systems in sectors such as manufacturing, energy, logistics, marketing, and finance, generating gains in scale and operational efficiency.

3.2.2.Adopt digital solutions gradually and adapt them to the company's reality. Technological implementation should take into account the company's stage of digital maturity. We recommend starting with affordable and scalable packages, such as AI-based ERP and automation tools for more repetitive tasks, and testing solutions through simulations before making more robust investments, especially in foreign markets.

3.2.3.Invest in practical tools that are integrated into business routines. It is recommended to choose technologies that are aligned with the company's daily activities, such as e-commerce platforms, chatbot services, digital marketing, and customer data analysis. This increases the return on investment and makes it easier to integrate digital transformation into existing business models.

3.3. Collaboration: Strengthening Networks, Partnerships, Integration, and Digital Ecosystems

3.3.1.Establish partnerships with technology providers and centers of excellence. Collaboration with technology providers and innovation hubs enables SMEs to access infrastructure, expertise, and customized solutions. Initiatives such as sandboxes, matchmaking platforms, and competency centers in the BRICS are mentioned as facilitators of structured access to digital transformation.

3.3.2.Integrate into support networks and public or multilateral digitalization programs. SMEs should leverage training opportunities, subsidies, and internationalization programs promoted by governments and multilateral platforms. The significance of digital platforms that offer integrated services, including marketing, financing, training, and dispute resolution, was emphasized.

3.3.3.Collaborate with business associations to overcome regulatory and technical barriers. Collaborating with sectoral and business organizations can help SMEs overcome regulatory barriers, access market information, and connect with international buyers. Such entities also aid in understanding local and international standards, supporting safe entry into new digital markets.

Annex

Digital Transformation in the Age of Artificial Intelligence: Empowering SMEs in BRICS for a Competitive Future

Webinar Series Program

Objective of the Webinars

The webinars aim to empower SMEs across the BRICS nations by fostering strategic dialogue on the transformative potential of AI and digital technologies. These discussions will focus on enhancing competitiveness, driving innovation, integrating SMEs into global value chains, and unlocking new growth opportunities within the BRICS countries and beyond.

Organized around key themes, the webinar series seeks to raise awareness, facilitate knowledge exchange, and promote evidence-based discussions on digital transformation for SMEs. Additionally, these webinars will provide a forum for stakeholders to explore practical strategies for adoption of AI, examine governance frameworks that promote inclusivity, and share insights on digital skills development to support SMEs to thrive in a rapidly evolving economic landscape. The sessions will also highlight AI tools tailored for SMEs and present practical solutions for fostering growth and resilience through the adoption of digital technologies.

Target Audience

the webinars are tailored for a diverse range of stakeholders, including policymakers, industry leaders, technology providers, and researchers from the BRICS nations. These sessions are ideal for those seeking to understand the transformative impact of AI and digital tools in enhancing SME growth, competitiveness, and integration into regional and global markets.

Participating Institutions

Organizers

- MEMP – Ministry of Entrepreneurship, Microenterprise, and Small Business of Brazil
- SEBRAE – Brazilian Service for Support to Micro and Small Enterprises of Brazil
- CETIC.br/NIC.br – The Regional Center for Studies on the Development of the Information Society at the Brazilian Network Information Center

Partners

- MCTI – Ministry of Science, Technology, and Innovation of Brazil
- MRE – Ministry of Foreign Affairs of Brazil
- MDIC – Ministry of Development, Industry, Trade, and Services of Brazil
- UNIDO – United Nations Industrial Development Organization
- UNCTAD – United Nations Conference on Trade and Development

Dates and Times

- First webinar: March 13, 2025, from 9:00 to 11:30 AM (GMT – 3)
- Second webinar: April 2, 2025, from 9:00 to 12:00 PM (GMT – 3)

Language and Transmission

The webinar series were held in English and Portuguese and live streamed via NIC.br's YouTube channel. They remain available at NIC.br´s YouTube channel.

Webinar 1: https://www.YouTube.com/watch?v=EOx9Xhw1Y3Y
Webinar 2: https://www.YouTube.com/watch?v=EOx9Xhw1Y3Y

Webinar Programme

Webinar 1: AI and Digital Transformation of BRICS SMEs

Date: March 13, 2025. 9:00 To 11:30 am (Brasília time, GMT – 3)

- Opening remarks
- Luciana Mancini, Special Advisor to the Minister on International Affairs and BRICS SME Working Group Chair, Brazilian presidency of the BRICS 2025.

- Panel 1: "Harnessing AI for productivity and innovation in SMEs"
- This panel discussed real-world case studies and strategies for AI adoption in BRICS SMEs, focusing on how these technologies enhance productivity, innovation, and created a competitive advantage for SMEs, while identifying the main difficulties facing them.

Moderator: Daniella Vieira, Head of Artificial Intelligence. Brazilian Micro and Small Business Support Service (SEBRAE).

Panelists:

- Valentina Rollo, Head of research, International Trade Center (ITC).
- Denis Bruno Viríssimo, AI & Analytics Manager, Technological Research Institute (IPT). Brazil.
- Clariça Soares, Coordinator of Innovative Entrepreneurship, Ministry of Development, Industry and Commerce of Brazil (MDIC). Brazil.
- Evgeny Osadchuk, Director of the Artificial Intelligence Department of the Supervisory Board of Digital Economy (ANO). Russia.

- Panel 2: "Digital skills for the future: building capacities for AI integration"

This panel addressed the critical need for upskilling and workforce development to ensure that SMEs are prepared for the digital economy. The discussion focused on developing the digital competencies required for successful AI adoption.

Moderator: Alexandre Barbosa, Head of Center for Studies on the Development of the Information Society (CETIC/NIC.br). Brazil.

Panelists:

- Basheerhamad Shadrach, Commonwealth Educational Media Centre for Asia Director, Commonwealth of Learning. India.
- Celso Camilo, Co-founder of Artificial Intelligence Center of Excellence of Federal University of Goias (UFG) Brazil.
- Juan Ivan Martin Lataix, Skills Digitalization Specialist, International Labor Organization (ILO).
- Ana Paula Nishio, Chief of Digital Transformation and Artificial Intelligence, United Nations Industrial Development Organization (UNIDO).

- Robert Vasiliev, Deputy Director of the Artificial Intelligence Laboratories Association (AILA), Head and Founder of the Applied AI lab Z-union. Russia.

Webinar 2: Market Access and Internationalization for BRICS SMEs

Date: April 2, 2025; 9 AM to 12:00PM (Brasília time, GMT – 3)

- Opening remarks:
  - Luciana Mancini, Special Advisor to the Minister on International Affairs and BRICS SME Working Group Chair, Brazilian presidency of the BRICS 2025.

- Panel 1: "E-Commerce and SMEs in the BRICS"

This panel explored how SMEs in the BRICS countries can leverage e-commerce strategies to overcome challenges, expand their market reach, and stay competitive in the global marketplace.

Moderator: Leonardo Lins, Coordinator of ICT Enterprises survey (Cetic.br).

Panelists:

- Torbjörn Fredriksson, Head of E-commerce and Digital Economy Branch, United Nations Conference on Trade and Development (UNCTAD).
- Nagwa Ebrahim El-Shenawy, Undersecretary for Information and Decision Support, Ministry of Communications & Information Technology (MCIT), Egypt.
- Felipe Daud, Director of Government Relations, Alibaba
- Clarissa Furtado, Competitiveness Manager at Brazilian Trade & Investment Promotion Agency (ApexBrasil).

- Panel 2: "Fostering digital policies and internationalization for SMEs"

This panel explored the role of digital policies, governance frameworks, and AI tools in enabling SMEs to thrive both locally and internationally. The session highlighted how digital transformation, including AI, can foster inclusivity and facilitate the internationalization of SMEs within the BRICS region and beyond.

Moderator: Lina Volpini, Head of Innovation and Market. (SEBRAE/MG).

Panelists:

- Quan Zhao, Trade Policy Advisor, International Trade Center (ITC).
- Mathieu Loridan, Senior Market Analyst, Global Trade Helpdesk, International Trade Center (ITC).
- Aleksei Savrasov, Industrial Development Officer of Digital Transformation and AI, United Nations Industrial Development Organization (UNIDO).
- Benno Weissner, Chair Sector Group Digital at Enterprise Europe Network.
- Liu Yujie & Yu Zhifang, Kingdee International Software Group Company Limited. China.

- Round Table: "BRICS perspectives on SMEs digital transformation"

A dialogue among representatives from BRICS nations, discussing national strategies, challenges, and opportunities in fostering SME digitalization and market access.

Moderator: Luciana Mancini, Special Advisor to the Minister on International Affairs and BRICS SME Working Group Chair, Brazilian presidency of the BRICS 2025.

Speakers:

- Brazil – Paulo Guerrero, Deputy Director for Trade Promotion and Facilitation, Ministry of Development, Industry and Commerce of Brazil (MDIC).
- Russia – Pavel Kondrashov, Head of International Cooperation Directorate of Russian Small Medium Business Corporation (RSMB).
- India – Sh. Vinamra Mishra, (GA & TP), Ministry of Micro, Small and Medium Enterprises (MSME).
- China – Li Yuan, Director of the Institute of Information and Communication Technology, Center for International Economic and Technological Cooperation, Ministry of Industry and Information Technology of P.R. China (CIETC, MIIT).
- South Africa –Nomfezeko Ntika, Director for Innovation, Department of Small Business Development.
- Egypt – Haitham ElMashad, Director of Digital Transformation and Innovation, Ministry of Industry.
- Ethiopia – Getahun Molla, Capacity building Lead Executive Office@ Ethiopian Enterprise Development.

- UNIDO - Aleksei Savrasov, Industrial Development Officer of Digital Transformation and AI, United Nations Industrial Development Organization (UNIDO).