

HOSPITALITY & LEISURE IN PORTUGAL

SECTOR INSIGHTS



the business | year

THE BUSINESS YEAR

SECTOR INSIGHTS: PORTUGAL HOSPITALITY & LEISURE

Portugal, with its pleasant climate, deep history, and stunning landscapes, has emerged as a compelling destination for visitors looking to stay a few days, a week, or even longer. In this Sector Insights report, we talk to the figures leading growth and innovation in the sector.

The hospitality sector in Portugal is experiencing a renaissance, driven by a combination of warm hospitality and strategic business opportunities. The country's commitment to providing exceptional guest experiences is mirrored in its diverse range of accommodation options. From luxury resorts to boutique hotels and charming guesthouses, investors have a plethora of choices to tailor their offerings to the discerning preferences of both leisure and business travelers.

Portugal's strategic geographical location as a gateway to Europe and Africa enhances its appeal for businesses aiming to establish a foothold in the region. The hospitality industry, in particular, benefits from this accessibility, with an increasing number of international conferences and events choosing Portugal as their host country. The modern conference facilities and convention centers in cities like Lisbon and Porto provide ideal venues for business meetings and corporate events, contributing to the sector's growth.

The leisure sector complements the business landscape, offering unique experiences that cater to both corporate retreats and individual travelers. The country's culinary scene, a blend of traditional flavors and innovative cuisine, presents opportunities for investors interested in the food and beverage sector. Establishing high-end restaurants or partnering with local culinary talents can be a lucrative venture in a market where gastronomy plays a pivotal role in the overall tourist experience.

Portugal's commitment to sustainable tourism is also noteworthy. The government actively encourages eco-friendly initiatives, creating opportunities for businesses focused on environmentally conscious practices. From eco-resorts to adventure tourism in the Azores, investors can capitalize on the growing demand for sustainable and responsible travel experiences.

Portugal's hospitality and leisure sector is not only a testament to the nation's warm welcome, but also a strategic business venture for investors. The combination of diverse accommodation options, strategic location, and a commitment to sustainable tourism positions Portugal as a business haven in the European market. As the country continues to evolve, savvy investors have the chance to be part of a dynamic industry that promises both financial success and the satisfaction of contributing to Portugal's growing reputation as a premier destination for business and leisure alike. ✖

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Project Director Cristina Villegas

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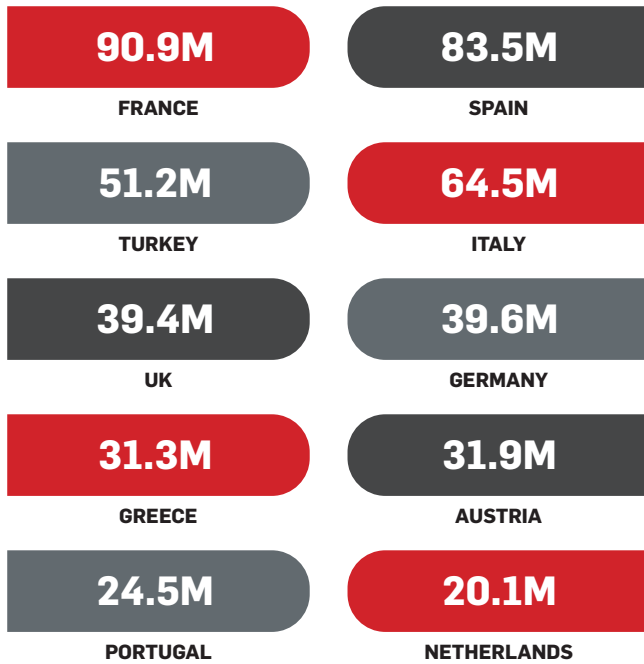
- 1**
From the editor's desk
- 3**
A place in the sun • **Infographic**
- 4**
Nuno Fazenda, Secretary of State for Tourism, Commerce & Services • **Interview**
- 6**
Raul Almeida, President, Turismo Centro de Portugal • **Interview**
- 8**
Glorious Eden
• **Communique: Parques de Sintra**
- 10**
Bernardo Trindade, President, Associação da Hotelaria de Portugal (AHP)
• **Interview**
- 11**
Cristina Siza Vieira, CEO, Associação da Hotelaria de Portugal (AHP)
• **Interview**
- 12**
Let the light in
• **Communique: The Lumen Hotel**
- 14**
Where events take place
• **Focus: MICE Tourism**
- 16**
The new Five-Star haven in the heart of Porto
• **Communique: Wine & Books Hotels Porto**
- 19**
Dália Palma, Fair Manager, BTL-Bolsa Turismo de Lisboa
• **Interview**
- 20**
The unifying power of food
• **Communique: WEAT**
- 22**
Fernando Garrido, President, Associação dos Directores de Hotéis de Portugal (ADHP) • **Interview**
- 24**
Engines for change
• **Communique: The Historic Villages of Portugal**
- 26**
Gonçalo Rebelo de Almeida, CEO, Vila Galé Hotels • **Interview**
- 27**
Time to check in • **Infographic: Hotels**
- 28**
Alexandre Marto Pereira, CEO, United Hotels of Portugal • **Interview**
- 30**
Margarida Almeida, Founder & CEO, Amazing Evolution • **Interview**
- 32**
Miguel Velez, Founder & CEO, Unlock Hotels • **Interview**
- 34**
Travel independently with charm: A business people to people
• **Communique: Across Portugal**
- 36**
An ESG twist • **Focus: Sustainability**
- 38**
Fermín Carmona, CEO, Hotelverse
• **Interview**
- 40**
Karina Simões, Head of Hotel Advisory, JLL Portugal • **Interview**
- 41**
The place to be • **Communique: WOW Porto**
- 42**
Gonçalo Garcia, Head of Hospitality Portugal, Cushman & Wakefield
• **Interview**
- 43**
Wine & rest • **Communique: Palácio Ludovice Wine Hotel**
- 44**
Mariano Faz, CEO, Ace Hospitality Management
• **Interview**
- 46**
Ana Cristina Beatriz, CEO, ABC Sustainable Luxury Hospitality
• **Interview**
- 48**
Exclusive retreat relaxed vacation
• **Communique: Sheraton Cascais Resort**
- 50**
Hole-in-one • **Focus: Golf Tourism**
- 51**
Miguel Franco de Sousa, President, Portuguese Golf Federation
• **Interview**
- 52**
Pedro Fontainhas, Managing Director, APR Portugal • **Interview**
- 54**
Oliver Key, General Manager, Penha Longa Resort • **Interview**
- 55**
Winding Rivers
• **Communique: Rio-a-Dentro**
- 56**
Those behind the magic
• **Focus: Developing skilled tourism workers**
- 57**
An Oasis of Luxury and Serenity in the Algarve • **Communique: Vilalara Thalassa Resort**
- 58**
Carlos Santiago Neto Brandão, President, Estoril Higher School of Hotel Management and Tourism (ESHTE) • **Interview**

A PLACE IN THE SUN

Portugal is Europe's ninth largest recipient of foreign tourists and has rebounded well since COVID-19 brought the sector grinding to a halt.

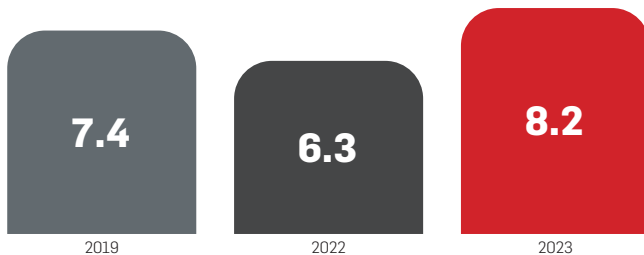
TOP EUROPEAN COUNTRIES BY INTERNATIONAL TOURIST ARRIVALS (PRE PANDEMIC, 2019)

SOURCE: UNWTO



HOTEL STAYS IN MILLIONS (JANUARY-JUNE)

SOURCE: REUTERS



TOP-3 1H2023 VISITORS BY SOURCE

SOURCE: REUTERS



REGIONS BY SHARE OF INTERNATIONAL ARRIVALS (AGGREGATE OF 2019, 2022 FIGURES)

SOURCE: STATISTA





YOU'RE VERY WELCOME

Nuno Fazenda
SECRETARY OF STATE FOR TOURISM,
COMMERCE & SERVICES

The Secretariat of Tourism, Commerce & Services has just helped deliver the best year yet for Portuguese tourism and is committed to making sure things only continue to get better.

With Portugal surpassing its 2019 tourism records in 2023, what strategic initiatives has the government implemented to sustain and foster this growth while ensuring sustainability and authenticity?

Until August 2023, Portugal achieved record levels of overnight stays (+9%) and touristic revenues (+39%) compared to the same period of 2019. To sustain and foster this growth while ensuring sustainability and authenticity means to continue expanding tourism to the entire territory, particularly in the countryside, throughout the year and, at the same time, accelerating the twin transition (climatic and digital) in the tourism sector. To achieve these goals, we are also committed to funding tourism investment projects that demonstrate sustainability across various dimensions, supporting and prioritizing investments in technology, infrastructure, and human resources. Considering that investing in people is also essential to achieve sustained growth, we have been implementing a set of specific measures to valorize tourism professionals, attract more individuals to work in the industry, improve their incomes, enhance the qualifications of these professionals, and embrace diversity, valuing differences. The recent award from the World Tourism Organization (UNWTO) in the category of "Best Tourist Villages 2023," awarded to the Portuguese villages of Manteigas and Sortelha, among others, is an international recognition of the work that has been done to preserve the socio-cultural authenticity of local communities, namely in the interior, fostering respect for their traditions and ways of life, as well as safeguarding their environmental and cultural heritage.

Given the recent statistics indicating a significant increase in tourist activity and revenue, how is the government collaborating with stakeholders in the hospitality sector to capitalize on these positive trends and further enhance Portugal's position in the global tourism market?

As a multisectoral activity that covers a diversity of stakeholders throughout its entire value chain, tourism has the power to mobilize other sectors. Therefore, strengthening Portugal's position in the global tourism market implies an integrated approach that involves governments, businesses, non-governmental organizations, local communities, and tourists themselves. We have been working closely with the stakeholders, developing specific tools to requalify the offer and allow better planning and management of environmental risks, financing small businesses and providing support for energy conversion, and improving water efficiency and the adoption of circular economy practices, on top of additional measures, such as recognizing exemplary labor practices and providing training opportunities to either grant or increase financial support.

Can you elaborate on specific measures taken to promote year-round tourism and distribute it evenly across various regions of the country?

The government has launched the Tourism Agenda for the Interior, a concrete policy to promote tourism in the interior regions of the country, with the goal to achieving year-round tourism across the entire territory, enhancing the quality of life for locals, attracting people to the region, and revitalizing the places, traditions, history, and local culture. Additionally, we are committed to the development and promotion of new and differentiated products, which adds value to the territories, such as wine tourism, literary tourism, cultural tourism, art, architecture, and others. Through differentiated tourism experiences, we aim to make Portugal more attractive, particularly to more demanding segments, and fulfill the objective of growing better, throughout the year, and across the entire territory. In addition, we are running a national and international tourism campaign aimed at providing more visibility to these products and regions.

In light of the recovery, could you discuss the role technology and innovation play in shaping the tourism experience in Portugal, and how the government is supporting the integration of these elements into the hospitality sector?

Innovation is an important pillar of the Portuguese Tourism Strategy and this includes the Tourism 4.0 program to promote Portugal as a global innovation hub with four main objectives: foster entrepreneurship as a vehicle for innovation and the creation of new companies; transfer knowledge to companies, connecting producers of innovation and companies that must apply it in their businesses; lead the innovation process, anticipating future changes in tourism; and train companies and human resources in the area of innovation. One of the fundamental pillars of this strategy is the Fostering Innovation in Tourism (FIT) Program, which boosts investment in tourism innovation, involving a network of incubators, investment institutions (starting with our partner Portugal Ventures), and science and tech companies as final beneficiaries of the innovation process. In the six years of this program, investments of more than EUR6 million has made it possible to create a network of 50 incubators. Added to this program is the landmark creation of NEST - Tourism Innovation Center, which has been an integral part of the strategy with its focus on the tourism experience, sustainability solutions, and big data.

Sustainability is a key focus for the future growth of tourism in Portugal. Can you share any specific policies or initiatives the government has implemented to ensure the industry's sustainable development and minimize its environmental impact?

The Portuguese Tourism Strategy constituted a milestone in tourism policy, placing sustainability at the core of the strategic options. The government developed an action plan that aims to contribute to stimulating the circular economy in tourism, promoting the transition to an economic model based on prevention, reduction, reuse, recovery, and recycling of materials, water, and energy, thus reinforcing the agenda for the circular economy in the tourism sector and placing the tourism

ecosystem at the forefront of the climate transition. Additionally, Portugal has engaged regions via the establishment of regional sustainable tourism observatories and there are five already established, which are being integrated into the UNWTO INSTO network. Portugal ranks as the fifth country worldwide with the highest use of renewable energies—60% of the energy produced comes from renewable sources and Portugal was the first country to chart a definitive roadmap for carbon neutrality, pledging to achieve this milestone by 2045, five years ahead of the timeline outlined in the Paris Agreement.

The World Tourism Organization notes a global tourism recovery between 80% and 95% of 2019 levels. How does Portugal's performance compare to these global trends, and what strategies does the government have in place to address any challenges or capitalize on emerging opportunities in the evolving global tourism landscape?

The tourism sector in Portugal recovered pre-pandemic results in a record time of just over a year and is one of the countries in Europe that recorded the greatest growth compared to 2019 results. In 2022, Portugal reached EUR21.1 billion in revenues, registering an increase of 15% compared to 2019, which represents 16% of GDP and marked the highest tourism numbers the country has ever seen. We trust that the growth of 2023 will be even bigger, so the Portuguese government stands by its mission of growing better, respecting the limits of the planet and its resources, generating value, and achieving long-term sustainability. The linear production and consumption paradigm that prevailed until the 21st century is being replaced by a circular and regenerative one, where nothing is wasted and everything is transformed, producing a positive impact in the territories, environment, and communities. Indeed, sustainability is only the starting point for a new paradigm, the regeneration. Portuguese tourism aims to be at the forefront of this transformation and actively contribute to the five major priorities of humanity: people, planet, prosperity, and peace, aligning its policies with the Sustainable Development Goals (SDGs). ✖



THE CENTER OF THINGS

Raul Almeida
PRESIDENT,
TURISMO CENTRO DE PORTUGAL

Turismo Centro de Portugal is keen to transform the center of Portugal into a global beacon of sustainable, diverse tourism—and it's well on the way.

In light of the region's rich historical and cultural heritage, how does Turismo Centro de Portugal plan to leverage these assets to attract diverse tourism in the coming years?

The central region of Portugal has enormous potential in terms of tourism, which has only recently begun to be discovered at an international level. We are, as you say, a region with a wealth of history and culture that is on a par with the best regions in Europe. We have a wide range of assets and diversified resources that can please all segments of visitors. Those who visit the center of Portugal can find nature in its purest state, as well as cities with an increasingly vibrant dynamism. This territory includes parks and nature reserves, protected landscapes, four UNESCO World Heritage sites (namely the Monastery of Alcobaça, Monastery of Batalha, Convent of Christ, and University of Coimbra, Alta, and Sofia), creative cities, thermal baths and spas, international religious tourism destinations, historical, schist, and mountain villages, as well as castles, monasteries, and convents, where you can breathe in the history of this country. Moreover, there is a vast intangible heritage, such as the most remote traditions, excellent wines, and age-old gastronomic recipes. All these assets are promoted by Turismo Centro de Portugal, through various structuring documents and in close collaboration with private companies, local authorities, associations, and other local tourism stakeholders. The region's tourism demand figures, which broke records in 2023 and show an increasing diversity of visitors, are proof that this is the correct strategy.

How does the organization plan to sustain and further enhance its position in the competitive tourism landscape?

The Centro de Portugal Regional Tourism Authority has received several distinctions and awards over the last few years, all of which recognize the quality of our work and the effective-

ness of our strategy. These honors encourage us to continue our commitment to constantly improve the promotion of the region, both within the country and internationally. Tourism is an extremely competitive and demanding area, so we can never take anything for granted. That's why we periodically review our strategy and come up with new solutions in order to sustain and, preferably, increase the region's national and international reputation. To give you an example, by the end of the year we expect to have finalized the Strategic Reference 2030, which outlines the main areas of strategic intervention that we will develop and implement over the coming years, considering the new trends in tourist demand and growing sustainability concerns.

With the increasing importance of sustainability in tourism, what initiatives or strategies does Turismo Centro de Portugal have in place to ensure responsible tourism development and minimize the environmental impact of tourism activities in the region?

Sustainability is a word that has fortunately entered the tourism lexicon. However, due to the specific characteristics of the center of Portugal, it is a concept that has long been part of our priorities. There was little talk of sustainability, and it was already a concern for Turismo Centro de Portugal. I could give several examples of initiatives at this level, but I must mention the "Sustainable Centre" project, which we started in 2021 in partnership with Biosphere Portugal. It is an ambitious and labor-intensive project that aims to create the conditions, throughout the territory, for the center of Portugal to be the first tourist region in the world with biosphere certification, awarded to entities that are committed to complying with the 17 United Nations Sustainable Development Goals and the Paris Agreement on Climate Change. This certification is a major objective of Turismo Centro de Portugal and very import-

ant steps are being taken toward this end, involving municipalities, companies, and associations from all over the territory that, by joining this project, are committing to implementing a set of good sustainability practices in the tourism offering. We believe that Centro de Portugal will effectively be recognized as the first sustainable tourist region in environmental, economic, and social terms. When growth is not sustainable, it has a negative impact on all areas. In the specific case of tourism, it is essential that its agents, together, understand that the activity can and should contribute to improve populations' quality of life.

The Tourism Investment Support Center plays a crucial role in supporting investment and entrepreneurship. Can you elaborate on specific initiatives or projects aimed at fostering innovation and sustainable development within the hospitality and tourism sector in central Portugal? Turismo Centro de Portugal has an investment support division that deals directly with over 25,000 tourism-related enterprises in the region, mostly SMEs, sharing information about investment opportunities, but also gathering information within the Sustainable Tourism Observatory, a project currently in development guided by UNWTO protocol and recently certified as a member of INSTO. This division is also responsible for the development of tourism entrepreneurship in the region, and enhances links between education institutions and enterprises. It organizes a competition for new tourism businesses (eight editions, with 378 business ideas presented) and a tourism-related academic thesis competition (7 editions), as well as an acceleration/open innovation program co-organized with 15 regional enterprise incubators (2 editions). As can be seen, fostering innovation and sustainable development is a major concern for us.

In the ever-evolving landscape of tourism, what market trends does Turismo Centro de Portugal identify as particularly influential, and how does the organization plan to capitalize on these trends to further enhance the region's attractiveness for visitors and investors alike?

The new trends in tourist demand favor, among other factors, the diversification of the offer and it is on this trend that we are betting. Because of its characteristics, the center of Portugal cannot, and should not, be a destination with a single product, such as sun and beach, culture, or history. But it can, and should, show itself to the world as a destination that manages to combine various offers, including sun and beach, culture, and history, for sure, but also nature, active and sports tourism, gastronomic tourism, wines, traditions and popular festivals, and interaction with the local population, among many other attractions. More than a mass tourism destination, we want to establish ourselves as a high-quality niche tourism destination. We have all the conditions to be so, as has been recognized by the awards we have received and the growing number of visitors. The opening of new tourist facilities in less obvious locations, further away from the usual destinations, also proves that investors are aware of this reality.

As the newly appointed President of Turismo Centro de Portugal, could you share your vision for the organization and highlight the main initiatives you aim to undertake during your mandate, particularly focusing on advancing the hospitality and tourism sector in the region?

I believe that this organization will only fulfill its mission if it brings together all the actors in the region directly or indirectly involved in tourism. That is why we intend to deepen our collaboration and connection with other public and private institutions. With this in mind, we intend to move forward with the creation of a Strategic Council for Turismo do Centro, which, as the name suggests, will have a consultative role in the strategies we want to implement, and which will bring together the main regional stakeholders in tourism. The continuous focus on improving the offer available to visitors, as well as the training, attraction, and retention of human resources, to mitigate the shortage of workers in the tourism sector, and the monitoring and evaluation of tourist activity, to help companies and decision makers to know the impact of their strategies, are other measures to which we will pay special attention. ✖



GLORIOUS EDEN

CARING FOR HERITAGE is a privilege, a responsibility, and a constant challenge, especially with regard to World Heritage Sites such as the Sintra Cultural Landscape, classified by UNESCO in 1995.

Since its foundation in 2000, Parques de Sintra-Monte da Lua has successfully embraced this mission, researching, conserving, restoring, publicising, and ensuring the public enjoyment of the natural and built heritage it manages: the Park and Palace of Pena, the National Palaces of Sintra and Queluz, the Chalet of the Countess of Edla, the Moorish Castle, the Park and Palace of Monserrate, the Convent of the Capuchos, and the Portuguese School of Equestrian Art. This constant endeavour unites the more than 300 employees of this public company, committed to preserving this exceptional heritage that encompasses past, present, and future.

In the current context characterised by climate change and the extremely serious threat it poses to the planet, natural and built heritage and biodiversity are at serious risk. As a consequence, it is our belief that passing on this legacy to future generations is only possible by adopting sustainable management and elevating it to a strategic vector. For this reason, Parques de Sintra, which has always conducted its activities in an ethical, socially and environmentally responsible manner, is deeply committed to evolving further on its journey towards sustainability and achieving its ESG goals.

Following its admission in 2022 to the Business Council for Sustainable Development (BCSD) Portugal, which brings together more than 170 leading companies in Portugal and helps them in their transition to sustainability, Parques de Sintra voluntarily signed up to the BCSD Portugal Charter of Principles, in which it commits to the United Nations Global Compact and the sustainable development goals set out in Agenda 2030.

As an entity that manages UNESCO-listed world heritage, Parques de Sintra is keen to play an active role in this process, adopting fundamental sustainability principles and seeking to extend them to its value chain within the sphere of its influence, namely in terms of legal compliance and ethical conduct; human rights; labour rights; prevention, health and safety; the environment; and management.

With regard to natural heritage, the company has also achieved important goals. In 2021, we obtained the International Forest Management Certificate from the Forest Stewardship Council (FSC®) for the entire 970ha of forest areas we manage. A completely voluntary process, forest certification attests to the adoption of good sustainable forest management practices from both an environmental and social point of view.

This year we took another important step toward decarbonizing the economy, one of the Sustainable Development Goals

defined by the United Nations in Agenda 2030. In March, we were awarded the Ecosystem Services Certificate for the service of conserving carbon stocks, which confirms that the forest areas managed by Parques de Sintra retain more than 220,000 tons of carbon, preventing this from circulating in the atmosphere and thus contributing to air purification. This is an important service that these ecosystems provide to the community, with a positive impact on health, quality of life, the conservation of natural capital, and the promotion of biodiversity, which are fundamental to increasing the territory's resilience to the effects of climate change.

These are important advances, but there is still a long way to go. That is why we remain focused on our objectives to promote decarbonization and energy transition, reducing the consumption of primary energy, water, and materials and ensuring sustainable forest management, boosting ecosystem services, and enhancing biodiversity.

The Climate Emergency Plan, which Parques de Sintra began implementing this year and which runs until 2030, will be a key instrument in achieving these goals. It is based on five main objectives, includes activities to achieve them, and defines indicators that will be monitored every three years. Among the various actions envisaged in this plan, we are carrying out a study to quantify carbon emissions at Parques de



Sintra, to be finalized at the beginning of next year. The conclusions we reach will allow us to implement specific compensation measures at a later date.

The work underway also naturally extends to the built heritage, which, in the parks and monuments managed by Parques de Sintra, stands in permanent dialogue with the natural heritage that surrounds it. This is reflected, for example, in the maintenance and heritage enhancement plans for the monuments in our care. By prioritizing the early detection and resolution of anomalies, we avoid the need for

more costly and intrusive interventions, which would have a greater impact on the heritage value of the building and would therefore be less sustainable.

Also noteworthy in this context is the limitation and control of entrances to the National Palace of Pena, in force since 2021. While before the pandemic the monument recorded 12,000 entries per day, now the number of visitors cannot exceed 6,000. This measure reflects the company's clear strategic commitment to the sustainability of this important national monument, aiming to prevent wear and

tear on the palace and to avoid overloading the entire operation, improving the quality of visits.

The transition to sustainability is as complex a process as is necessary. It is a path we are treading in the present with our eyes set on the future we want for this valuable and unique heritage that makes up the Cultural Landscape of Sintra. We have a responsibility to bequeath it to succeeding generations with the same charm that dazzled Camões, Garrett, Eça de Queirós, Beckford, and Lord Byron. We are working hard to preserve this "glorious Eden." ✖



ON THE RIGHT PATH

Bernardo Trindade
PRESIDENT,
ASSOCIAÇÃO DA HOTELARIA DE
PORTUGAL (AHP)

AHP, Portugal's hotels association, continues to provide leadership to the sector at a time of great growth and change.

Considering Portugal's role as a leader in European economic growth driven by tourism, what key factors do you believe contributed to the sector's impressive recovery in 2022?

The year 2022 was indeed very good for the sector, with a significant recovery after two years of pandemic. We broke records in terms of tourist revenue. It was also the year in which we regained the trust of our customers and positioned ourselves as a destination in strategic markets, such as the American market. The fact that Portugal is a welcoming country, adept at hospitality, safe, and with a good quality/price ratio contributed to our rapid recovery.

You mentioned the loss of a significant number of assets in the tourism sector during the pandemic. How is AHP working to address the labor shortage in the industry and improve the quality of service as it recovers? The hotel sector, as we know, is a labor-intensive activity. Not being an exclusive issue in Portugal—it's a global concern—the truth is that in our country we have a situation of almost full employment. However, during the pandemic, we lost 45,000 assets in the tourism sector. Then, we recovered more quickly than expected in 2022, which also resulted in a lower service quality than expected. At this moment, all of us, throughout the tourism value chain, are working. Studies have pointed to leadership in salary growth in tourism when compared to the rest of the Portuguese economy. We are working on a new service delivery paradigm that provides different benefits to our employees. Still, a hotel is what we know. We are open 24 hours a day, 7 days a week, 365 days a year.

The agreement with the CPLP to bring citizens from the Lusophone space to work in Portugal is an interesting initiative. Can you share more details about this program and its impact on the workforce in the hospitality sector?

For now, we don't have information about the results of this

agreement. However, I can tell you that bringing citizens from the Portuguese-speaking world to work in Portugal, with an unbureaucratic and simple process, is fundamental to attracting more foreign workers. We need to streamline procedures and have a green lane for immigration. However, what we feel is that these people arrive in Portugal, many of them with deficits in technical and linguistic training, so it is crucial to have full integration of these citizens into our country. Therefore, there must be a joint effort between companies, hotel schools, and the Institute for Employment and Vocational Training to fill these gaps. The Portuguese Hotels Association (AHP) has been requesting the Portuguese government create extraordinary housing support for displaced workers, precisely due to the shortage of human resources, but also because of the need for mobility in the hotel industry, as well as in other sectors such as agriculture, education, and health.

With the ongoing uncertainties related to the war in Ukraine and global supply chain disruptions, how is AHP helping its members navigate these challenges and plan for a sustainable future?

First the war in Ukraine began and now the crisis in the Middle East. The current geopolitical situation brings a huge degree of uncertainty to the entire value chain of the tourism sector. Everything is more expensive, including labor, electricity and gas, food, and various services. And the outlook remains uncertain. The tourism and hospitality industry is well aware of the responsibility it has in the country's macroeconomic framework. We don't turn our backs on the challenges, but we also know that there are areas where we need to be helped. That's why the issue of housing concerns us. At the same time, we have the HOSPES Program, which aims to guide and commit each of AHP's hotels and partners to a common cause: promoting the sustainability of hotels and tourism while acting on three pillars: social, economic, and environmental. ✖



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