

DRAFT ANNUAL TOURISM REPORTING TEMPLATE

1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986¹ establishing a consultation and cooperation procedure in the field of tourism foresees that “each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States”.

With the publication of the “Agenda for a sustainable and competitive European tourism”, the Commission announced that “in order to strengthen the collaboration with and among Member States, their current annual reporting through the Tourism Advisory Committee (TAC) will be used to facilitate the exchange and the dissemination of information about how their policies and actions safeguard the sustainability of tourism”. This Communication was welcomed by the Competitiveness Council conclusions (22nd-23rd November 2007) and by the Presidency Conclusions of the Brussels European Council of 14th December 2007.

The main aims for the reporting process are:

- to be able to monitor the level of implementation of the “Agenda for a sustainable and competitive European tourism” by Member States;
- to facilitate the exchange of experiences among member States with regard to how they tackle issues which are important for the competitiveness and sustainability of European tourism.

MS reports referring to year n shall be sent to the European Commission by the end of February of year $n+1$. If the reports are sent in English, the deadline is shifted to the end of April.

2. ORGANISATIONAL STRUCTURE

This section should provide an overview of the main organisational structure to illustrate how tourism is organised and managed, to identify linkages and to identify the engagement of other organisations/stakeholders.

The information required will only need to be prepared fully in year 1 as it will subsequently only be necessary to provide details of any changes.

¹ Official Journal L 384, 31/12/1986 P. 0052 – 0053.

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2.1 Please identify the National Bodies responsible for tourism (Ministry and also any separate/related National Tourism Organisation), including key areas of responsibility, and their relationship to other national bodies. (maximum of 1.000 characters)

National Organisation:

As part of a general public administration reform, all centrally-organised tourism bodies were merged in 2007, into a single body, **Turismo de Portugal I.P.**, the National Tourism Authority (NTA).

Under the aegis of the Secretary of State for Tourism and the Ministry of Economy and Innovation, the NTA (Turismo de Portugal I.P.) is responsible for the promotion, valorisation and sustainability of tourism activities, under a specific umbrella approach, namely:

- To define strategies and policies
- To enhance and develop tourism infrastructures
- To grade tourism offer
- To develop training opportunities
- To support investments in the sector
- To manage programs and incentives
- To co-ordinate the promotion of Portugal as a tourism destination – both internally and externally
- To regulate and inspect gambling activities
- To co-operate at international level

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2.2 Please, describe what organisations/agencies are used to deliver services at the national and regional level and the services that they deliver. (maximum 800 characters)

Regional Organisation:

The legislation relating to the responsibilities of Portugal's tourism regions undertook a revision.

Eleven **Regional Tourism Bodies** (Entidades Regionais de Turismo - **ERTs**) were created to ensure regional tourism development in the continent. They act as management bodies with financial and administrative autonomy and are geographically defined in accordance with the five regional areas that reflect territorial units used for statistical purposes NUTS II (Norte, Centro, Lisboa e Vale do Tejo, Alentejo and Algarve) and with the 6 tourism development poles (Douro, Serra da Estrela, Leiria-Fátima, Oeste, Litoral Alentejano e Alqueva). They are an important instrument for the country's strategic policies alignment at national, local and regional level. ERTs are responsible to add value and promote tourism resources sustainable development, acting as privilege communication interfaces with the NTA. As main responsibilities they must:

- Contribute to the national and regional tourism policy
- Ensure the development and valorisation of tourism products/resources
- Monitor tourism offer
- Promote the regions in the domestic market whilst cooperating with both the NTA and ARPTs in the regional destination external promotion.

Regional Directorates for Tourism

In the autonomous regions of Madeira and Açores the Regional Directorates contribute to ensure the tourism policy defined by the autonomous Regional Governments. As main responsibilities they must:

- Contribute to the national tourism regional policy
- Foster the development of the tourism offer
- Ensure the co-operation from the regions both with national and international bodies and the NTA

International Promotion

There are seven **Regional Agencies for Tourism Promotion (ARPT's)**, that geographically correspond to the 7 promotional destinations in international markets (Porto e Norte, Centro de Portugal, Lisboa Região, Alentejo, Algarve Açores and Madeira) They are private associations from the public (among which Regional Tourism Bodies) and private sector that have a formal Protocol (Contract) with Turismo de Portugal I. P. They represent the stakeholders involvement in implementing projects and programs from both PENT and Turismo de Portugal I. P.

As main responsibilities they must:

- Elaborate and execute the Regional Promotional Plans for Tourism (in accordance with their contract with the NTA)
- Consolidate international promotion
- Reinforce the strategic umbrella approach

Tourism Promotion Teams Abroad

The NTA also has a network of 15 Tourism Promotion Teams abroad. These teams belong to AICEP offices abroad, but are funded and directly report to Turismo de Portugal I.P. Their main responsibilities are:

- Develop and implement international tourism actions and marketing campaigns in accordance with PENT's directives
- Reinforce the country's strategic approach to the tourism sector
- Enhance operational efficiency

For the first time ever in Portugal, a single institution now aggregates all government bodies responsible for stimulating tourism activities – from supply to demand. Maintaining a privileged relationship with other public bodies and economic agents in the country and abroad, Turismo de Portugal, I.P. is committed to fulfilling the core objective of strengthening sustainable tourism - as one of the key engines of growth of the Portuguese economy.

This new structure provides better coordination of both national and regional performance within a common strategy and an agreed action plan, and should present a clearer view of the country's sustainable destination choices, leading to greater promotional efficiency. The objective is also to achieve greater involvement from the private sector, namely in investment.

2.3 Please, describe which other bodies and organisations are involved at the national level and the process for involving them. (maximum 800 characters)

Turismo de Portugal I.P. cooperates with different entities and established partnerships for specific purposes:

CEPT – Strategy and Promotion Tourism Council (Conselho Estratégico do Turismo)

CEPT is a Strategy and tourism promotion council with consultive and deliberative functions. Twice a year a meeting is held with the Secretary of State for Tourism, the President and Vice President of Turismo de Portugal IP, the Regional Agencies for Tourism Promotion (ARPTS), the Regional Directorates for Tourism (Madeira and Azores) and the public and private sector associations (ANRET and CTP).

Tourism 2015 (Turismo 2015)

This strategic partnership aims the recognition of the tourism sector as a Competitiveness Pole in the framework of Collective Strategies for Efficiency that are part of QREN (National Strategic Reference Framework), in accordance with PENT's strategic guidelines, joining together the most representative players of the tourism sector in Portugal: Turismo de Portugal I.P., CTP (Portuguese Tourism Confederation), ERTs, ARPTs and the Hospitality Management Institute. This recognition will allow a privileged access to EU structural resources foreseen in QREN in order to act in four critical areas of Tourism Policy: Knowledge and Innovation, Human Resources, Tourism Offer and Promotion.

Strategic Council for Education and Training in Tourism (Conselho Estratégico de Educação e Formação em Turismo)

Recognising Tourism's importance for national economic growth, COTEC Portugal (Entrepreneurship Association for Innovation) proposed to Turismo de Portugal I.P. creating a strategic council that would work/reflect on the structural challenges for education and training in the tourism sector. Together with COTEC, the main partners for this initiative / forum were identified. They are mainly the top employers for the tourism sector, universities and

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professional associations. The Council allows Turismo de Portugal I.P. a close connection with all the interested parts thus proactively intervening in what refers to actions and initiatives to undertake regarding education and training in the tourism sector.

Measures to improve the current training system where already identified and set into action. Namely curricula enrichment in accordance with the market needs; on the job training activities; a clear raise in English training; fostering technology and behaviour learning and following the guidelines of the Hospitality Management Institute.

Product's 'Clubs' (Clubes de Produto)

Through these 'Clubs' Turismo de Portugal I.P. and the stakeholders foster reflexion / knowledge exchange platforms from which it becomes possible to identify possible solutions for the constraints that all involved parties are facing in stimulating the development of the 10 strategic products. For example in the Golf 'Club' issues like design and management of golf courses; promoting golf practice; internal and external marketing strategies for the product are discussed

2.4 Please provide a diagram/organogram of the organisational structure for tourism identifying the relationship between national, regional and local bodies. Provide also a short description of the core responsibilities and competencies of each of the organisations. Include also information regarding the direct and indirect links between other departments, stakeholder organisations and unions. Information about mechanisms of decision making process participation from outsider organisations, e.g. forums, advisory committees is also requested. (maximum of 2.000 characters)

See power point attached file

2.5 Please provide information about financial data, including spend/budget on tourism as a percentage of overall government spend/budget, the level of national funding support for tourism marketing, the amount of EU funding support made available for tourism and data concerning the support to SMEs and Destinations. (500 characters)

The NTA funding comes from gambling receipts/taxes.

It is regulated by specific laws that determine the gambling taxes (in accordance with the different types of gambling facilities/revenue) and also by the contracts that are signed between the gambling granting areas with the state.

3. POLICIES AND STRATEGIES

3.1 Is there a current National Strategy for tourism? Yes No

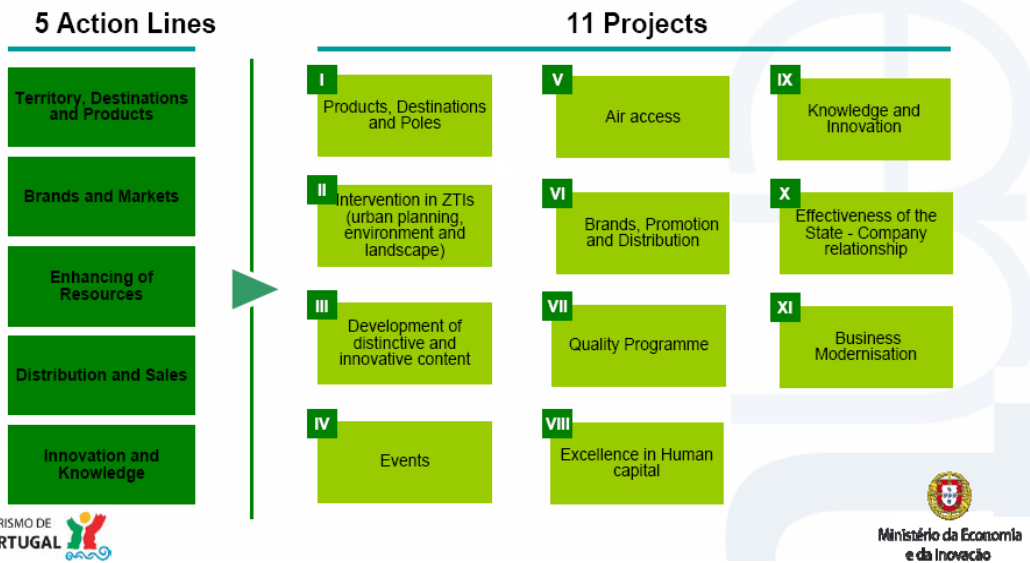
If yes, please, provide information in bullet point format about the key aims, objectives and priorities of the strategy highlighting those that are designed to address sustainability issues in economic, environmental and social terms in particular those related in the six aims included in the Agenda. In preparing the tourism strategy, explain how consideration has been given to the 9 principles set out in the Agenda (para2.3 p5) and given in the appendix. (maximum 1.000 characters)

PENT – National Strategic Plan for Tourism is a governmental initiative, under the aegis of the Ministry of Economy and Innovation. Until 2015 it will be the support framework for national tourism sustained growth as well as the orientation guideline for the National Tourism Authority – Turismo de Portugal, I.P.

PENT defines a stable path of action, involving all parties, with clear targets and objectives, that will enable tourism to provide a decisive contribution to the well-being of the Portuguese population and it’s cultural assets, through wealth generation, job creation, and an inherent capacity to promote territorial cohesion.

PENT's IMPLEMENTATION PROGRAMME

- > Successful execution of the strategic development guidelines will require rigour, innovation and a proactive attitude from both public administration and private sector
- > PENT's implementation is structured around 5 action lines, based on 11 projects



3.2 Who was the initiator and who is responsible for its implementation? (maximum 200 characters)

The NTA (Turismo de Portugal I.P.) was the initiator and is responsible for its implementation in close cooperation with ARPTs and ERTs.

3.3 How is the strategy monitored and how often? (maximum 500 characters)

The strategy is monitored through a specific *Tableau de Bord* created for PENT’s objectives and also through the NTA (Turismo de Portugal I.P.) annual activity report.

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3.4 What tourism specific legislation exists? (maximum 500 characters)

Recently approved legislation establishes the legal framework to install, explore and use tourism infrastructures (such as hotels). Criteria sets were also established for energetic efficiency, sustainable usage of water, proper Access for reduced mobility persons, environmental certification, green areas, among others.

Decreto Lei nº 39/2008, de 7 de Março - Estabelece regime instalação, exploração e funcionamento dos empreendimentos turísticos

Portaria n.º 327/2008, de 28 de Abril – Aprova os requisitos dos Estabelecimentos Hoteleiros, Aldeamentos Turísticos e Apartamento Turísticos.

Portaria nº 517/2008, de 25 de Junho - Estabelece os requisitos mínimos a observar pelos estabelecimentos de alojamento local.

Portaria nº 937/2008, de 20 de Agosto – Estabelece os requisitos mínimos a observar pelos estabelecimentos de turismo de habitação e de turismo no espaço rural.

Further legislation in attach (Word document)



LEGISLACAO
TURISMO.doc

Note: We do not translate legislation

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4. MEASURES AND INITIATIVES

This section provides Member States with an opportunity to outline specific initiatives and policies that are or are going to be adopted to manage and develop tourism activity in ways which respond to the key challenges of the Agenda and which fall within the six main aims of the Agenda itself.

1 Economic prosperity

- a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.
- b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

2 Social equity and cohesion

- a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
- b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.

3 Environmental and cultural protection

- a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
- b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.

4.1 Please set out, briefly, the steps which have been or will be taken, if any, to address the 7 key challenges for the delivery of sustainable and competitive tourism, covered in the TSG report and referred to in the 'Agenda'.

4.1.1 Reducing the seasonality of demand. (maximum 200 characters)

- In the tourism policy for investment support there is a positive discrimination towards all the products that might reduce seasonality of demand.
- Foster tourism products that reduce seasonality of demand (Nature Tourism, Golf, City Breaks, Meetings and Congresses and Cultural and Landscape Tourism)
- Marketing campaigns to attract both national and international tourists during off peak season (Domestic Campaign: International Campaign, ALLGARVE)

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4.1.2 Addressing the impact of tourism transport. (maximum 200 characters)

- Turismo de Portugal I.P. finances and supports the development of cycle's routes and pedestrian walks.

4.1.3 Improving the quality of tourism jobs. (maximum 200 characters)

- Turismo de Portugal I.P. has its own network of Hospitality and Tourism schools (16), enabling training, and certification for students and professionals in the tourism sector. This network was re-structured and curricula was revised in order to prepare young people for their first job and to enable professionals to increase skills, gain certificates and obtain qualifications. Turismo de Portugal I.P. also certifies Professional training provided by other schools.
- HMI Portugal – new partnership joining Florida University, ISCTE, Algarve University and ESHT (Hospitality and Tourism school Estoril)
- Hospitality and Tourism schools curricula certified by the *Ecole Hôtelière de Lausanne*
- Recognition, validation and certification of tourism professionals labourers skills in the areas of hospitality and food and beverage
- Partnerships with Hospitality and Tourism international in content/curricula development and training courses
- Opening new Hospitality and Tourism schools in Portalegre, Caldas da Rainha and Óbidos
- Launching "on the Job" training activities
- Online Job opportunities offer on the corporate website

4.1.4 Maintaining and enhancing community prosperity and the quality of life, in the face of change. (maximum 200 characters)

- PENT defined new regional poles (areas) of tourism attraction ensuring their sustainable development through a constant dialogue with ERTs (the entities that manage those destinations) thus creating better living conditions for the local communities and stimulating economic growth.
- Recently approved legislation establishes the legal framework to install, explore and use tourism infrastructures (such as hotels). Criteria sets were also established for energetic efficiency, sustainable usage of water, proper Access for reduced mobility persons, environmental certification, green areas, among others.
- Projects of National Interest – financial support to enterprises investments in areas of activity that might promote economic diversity, generate qualified employment, add value through innovation and that represent a global investment above 25 million euro.

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4.1.5 Minimising resource use and the production of waste. (maximum 200 characters)

- Turismo de Portugal I.P. supports projects that contribute to reduce the usage of natural resources, as well as waste reduction (ex.: technological innovation projects, environmental certification, and so on).
- In the framework of QREN (National Strategic Reference Framework) Turismo de Portugal I.P. establishes a set of environmental priorities for calls referring to private investment in the sector
- Turismo de Portugal Awards- Turismo de Portugal awards and publicly recognises projects that present best environmental practices, among other categories.
- Knowledge production: National Study about Hotels best practices regarding sustainability and environmental issues
- European Eco-label for tourism hospitality services and Camping Parks

4.1.6 Conserving and giving value to natural and cultural heritage. (maximum 200 characters)

- Financial support to projects envisaging cultural and natural heritage preservation / restorations
- Partnership with Nature Conservation and Biodiversity Institute focusing on activities that foster improved services / added value to nature tourism
- Project World Heritage Tourism Itineraries – Alcobça, Batalha and Tomar

4.1.7 Making holidays available to all. (maximum 200 characters)

- Cooperation and financing of INATEL. The Senior Tourism Project is co-financed by Turismo de Portugal I.P. and set in to action by INATEL, with two main objectives : allow access to holidays inside the country to senior citizens with lower economic resources; reduce the seasonality of demand using hotels services during off peak season at "discount" prices.
- Turismo de Portugal I.P. financially supports the Youth Hostels Network in what refers to new infrastructures and upgrading existent facilities
- Fostering accessible tourism – this was a specific initiative undertaken by Turismo de Portugal I.P.

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4.2 As key challenges may change over time, please identify any other areas that are becoming a new challenge. (maximum 600 characters)

- Climate changes
- Energetic Efficiency
- Wastewater treatment and usage
- Sea Water Desalination and usage to irrigate golf courses and so on
- Fighting world economic crises
- Population aging: this will have serious impact on world travel world

4.3 Please identify and describe a specific initiative, which is related to the 7 key challenges, that is innovative/ successful and which would be of interest to or of help to other Member States. (maximum 2.000 characters)

Turismo de Portugal Awards

Turismo de Portugal Awards are a initiative from Turismo de Portugal, I.P. that aims to distinguish quality and innovative tourism projects that will foster the competitiveness of Portugal as a tourism destination, whilst disseminating environmental and management good practices that will give a positive contribute to the sustainability of the tourism activity / sector.

2008 edition awarded the best private and public projects that contributed towards the tourism development in the country.

There where 8 categories of awards:

“Novo Projecto Privado”, “Novo Projecto Público”, “Requalificação Projecto Privado”, “Requalificação Projecto Público”, “Serviços”, “Animação & Eventos”, “Sustentabilidade Ambiental” e o “Prémio Especial Turismo de Portugal”.

All projects present innovative characteristics related with:

concept, design, management assets, equipments, (adaptability to the surrounding environment and local population, recovering cultural and/or natural heritage, valorisation of natural resources, promotion of traditional products as well as new tendencies of design and contemporary art), excellence of provided services, environmental good practices (minimising resource use and the production of waste., raising tourists awareness toward environmental concerns).

Projects Evaluation criteria directly relate with resources qualification, innovation and quality of services provided to the clients, good environmental practices, alignment with regional tourism and PENT's strategies.

Awarded projects represent initiatives of Excellence (public or private) that effectively contribute towards tourism destinations valorisation as well as for the recognition of Portugal as a quality international tourism destination.

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5. MECHANISMS FOR IMPLEMENTATION

Three mechanisms for implementing the Agenda were identified in the “Agenda”: sustainable destinations, sustainable businesses and responsible tourists.

5.1 Sustainable destinations: What support is given to strengthen destination management at the regional/ destination level (supportive policy environment, knowledge networks, training programmes, establishment of measures/indicators for benchmarking, etc.)? (maximum 600 characters)

The legislation (Decreto-Lei n.º 67/2008, de 10 de Abril,) regarding the 11 Regional Tourism Bodies (Entidades Regionais de Turismo – ERTs – see 2.2) empowers them to strengthen destination management/ development at the regional/ destination level in close cooperation with the NTA, though privileging the sustainable usage of resources.

This new management framework gives ERTs the capacity to auto finance themselves, stimulating local stakeholders investments and involvement, thus creating new opportunities for fostering development projects.

5.2 Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of businesses (supportive policy environment, orientation of business support services to sustainability, training, financial incentives, etc.)? (maximum 600 characters)

- **“Turismo de Portugal Awards”:** projects recognition in environmental sustainability ” (already mentioned in 4.3)
- **Bank Protocols:** credit contracts to enterprises that present projects that will enable PENT’s (National Strategic Plan for Tourism) objectives
- **Tourism Intervention Project:** support to investments in tourism infrastructures that will enable PENT’s (National Strategic Plan for Tourism) objectives towards destinations, products and poles

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5.3 Responsible tourists: What support is given to promote responsible choices by tourists (e.g. sustainability in education, national marketing and media campaigns, promotion of certification schemes)? (maximum 600 characters)

Promotion of certification schemes/ quality labels:

Green Key

Project from *Associação Bandeira Azul da Europa (Foundation for Environmental Education)*

Turismo de Portugal I.P. is involved in the annual award ceremony where the 'award' is given to the Hotels, Youth Hostels and Rural Tourism facilities that follow a set of criteria in the areas of environmental management, products and resources consumption, workers participation, clients information, activities for clients as well as top management skills.

EU Eco Label

Turismo de Portugal I.P. cooperates in the process of evaluating applications from hospitality services (hotels and so on) as well as camping parks.

Blue Flag

Project from *Associação Bandeira Azul da Europa (Foundation for Environmental Education)*

Turismo de Portugal I.P. participates in the annual attribution of this certificate to all beaches that are compliant with a set of criteria regarding environment, nature, security, water, user's health and comfort, as well as environmental information to tourists.

Accessible Beaches

Annually awarded certificate given by *Instituto Nacional para a Reabilitação I. P.* (National Institute for Rehabilitation), to beaches that fulfil the following criteria: pedestrian accesses, parking area, accessibility to bath area, wooden walkway laid over the sand, adapted lavatories, and easy access to first aid post.

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6. DATA AND INDICATORS

Eurostat will provide, as an annex, the key statistical data required to support the reporting process covering around 20 indicators². These are mainly related to the aim of 'economic prosperity'.

Please, identify indicators that are being used or developed which could add to the range of information being provided by Eurostat, particularly in relation to social and environmental issues (other indicators from the TSG report, visitors/ residents satisfaction, etc.). (maximum 500 characters)

The following indicators (along with Eurostat ones) are being developed:

- Tourism Receipts
- International Tourism Expenditure
- Residential Tourism
- Leisure and Outdoor Activities Companies (offer)
- Cultural Services (offer)
- Demand for Tourist and Sport Events
- Employment in Tourism related economic activities
- Tourism Intensity
- Tourism Density
- Average receipt per overnight in Hotels and Similar Establishments
- Percentage of Rede Natura 2000 (Nature network) in the tourism regions
- Satisfaction rate from resident population towards tourism activity
- Number of Tourism projects with a previous environmental impact study
- Incentive Programs to Sustainable development (number of)

² These indicators have been selected from the 50 TSG indicators on the basis of the possibility to calculate them at the European level.

7. COMPLEMENTARY ADDITIONAL INFORMATION

If necessary use the following box to provide additional complementary information that has not already been covered.

Implemented Measures to face the Crisis

- Hard selling campaigns with Tour operators and airlines from the traditional main markets;
- 500M€ Credit line in benefit of tourism industry; 60M€ Credit line in benefit of restaurants;
- Domestic tourism advertisement campaign, also extended to Spain.
- Monetary policy (interest rates, credit lines, etc)
- Horizontal economic measures: 800M€ Credit line for SMEs; 100M€ Venture capital for real estate investment projects.
- Tourism Hospitality enterprises are exempted to pay taxes to Turismo de Portugal I.P. in cases of "reclassification processes"

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APPENDIX

Principles of sustainable tourism:

- **Taking a holistic and integrated approach**

All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.

- **Planning for the long term**

Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.

- **Achieving an appropriate pace and rhythm of development**

The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.

- **Involving all stakeholders**

A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.

- **Using best available knowledge**

Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, and skills and experience, should be shared across Europe.

- **Minimising and managing risk – the precautionary principle**

Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.

- **Reflecting impacts in costs – user and polluter pays**

Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them.

- **Setting and respecting limits, where appropriate**

The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.

- **Undertaking continuous monitoring**

Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.