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Отримано 15.03.2009. ХДУХТ, Харків.

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УДК 658.231:640.41(477)

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UKRAINIAN HOTEL BUSINESS DEVELOPMENT

ПЕРСПЕКТИВИ РОЗВИТКУ ГОТЕЛЬНОГО БІЗНЕСУ В УКРАЇНІ

Розглянуто проблеми українського ринку готельних послуг, який на сьогоднішній день характеризується низьким рівнем насичення і високим попитом. Але, за ринковими законами, ненасичений ринок не може існувати довгий час. Автори надають характеристику критеріям та підходам до економічного розвитку готельного бізнесу в Україні. Розглянуто різноманітні підходи до проблем розвитку готельного бізнесу по регіонах України.

Рассмотрены проблемы украинского рынка гостиничных услуг, который на нынешний момент характеризуется низким уровнем насыщенности и высоким уровнем спроса. По рыночным законам ненасыщенный рынок не может существовать длительный срок. Авторы характеризуют критерии и подходы к экономическому развитию гостиничного бизнеса в Украине. Рассмотрены подходы к проблемам развития гостиничного бизнеса в Украине.

The problems of Ukrainian market of hotel services are considered in the article. The market just goes on the stage of its development which is characterized by the low level of market saturation and high demand. According to the market economy rules, unsatisfied demand can't exist long. The article describes the industry's physical and economic characteristics and identifies yardsticks and economic ratios. Regional characteristics and differences are discussed.

Overview of the problem in general. As is the case with real estate in general, the hotel industry is cyclical. However, hotels are also operating businesses. Hotels are influenced by factor that often have little or no effect on other kinds of real estate, such as health of the economy, business travel needs, and people's recreational plans. These factors have a significant impact on the hotel industry, and the corresponding value of hotels.

Analysis of the last publications. Tourism industry in Ukraine demonstrates fast rates of growth for an extended period of time. For the last 5 years industry has increased to 12-15%, growth of internal tourism has made 5%; the number of foreign tourists increased by 19% in 2003 and by 10% in 2004. The profits that tourist companies generate increase (due to the increase of purchasing power of domestic population and increased amount of foreign tourists), as well as the number of services those tourist companies are ready to provide. Such a positive tendency certainly leads to the increase in demand for different hotel services.

The analysis shows that Ukrainian hotel industry reacts to the changes of market conditions too slowly. Constantly growing demand is satisfied basically by the so-called "private sector" (grant apartments and houses on lease) especially during the peak periods, whereas hotel services are poorly demanded. It is possible to single out two main reasons of this low demand:

- actual level of service is declared below. The majority of 3- and 4-star hotels have not been renovated for more than 10 years and mismatch requirements of standards;

- the lack of hotels in the most mass average price segment (in a number of cities, such as Kiev and Odessa, municipal programs are accepted on the development of networks of 3-star qualitative hotels, however these programs remain on a paper because of the absence of investors till now);

- majority of experts agree that the main causes could be explained by the uncertainty about the future demand for services. Nowadays, it is challenging to determine the future trends of the tourism industry, hence, the return on investments. The second reason is believed to be a financial sector;

- investments into hotel industry are perceived as unattractive by domestic investors since they usually require large funds and considered to be long-term. At the same time, there are more attractive industries for the investments, allowing return of funds in a couple years, instead of 4-7 years, as in hotel business in Ukraine);

- absence of the long-term and affordable financial sources, accessible to the domestic companies, makes the application of financing mecha-

nisms (so common for "western business") for building and development of hotels impossible;

– absence of strategic investors on the Ukrainian market that would be able to attract investments in demanded volumes.

The other reasons include:

– still relatively low purchasing power of local population (though the improvement of parameters has been observed in 2004 and 2005).

– low demand for hotel services from B2B (business travelers etc.).

Nevertheless, the expected future trends in economy and in tourism make hotel business attractive for the potential investors for at least the next 3-4 years. Some experts expect boom in the real estate business due to the rapprochement between Ukraine and European Union. Taking into account that in the countries of Europe and the USA hotels basically enter into franchise networks, it is possible to predict arrival on the market leading hotel's operators, and along with them– investors (traditionally the majority of funds is invested into well-known hotels that are the part of famous international hotel networks, well proved on the international market).

Even prior to well-known "orange revolution" that took place in Ukraine at the end of 2004, leading hotel business players studied Ukrainian market and planned entering into it. However, majority of the companies were disturbed with the existing at that time political instability which questioned the reliability of the government guarantees. At the present time such giants as Radisson, Hyatt (ISD in 2006 involved credit of the IFC for hotel construction of this brand in Kiev, Ukraine) already work on the Ukrainian market along with some other operators. In addition, Ukrainian market is in the sphere of interest of Actively Hilton, InterContinental, Marriot and Kempinski (the last one had a bad experience of creation of hotel in Odessa which after commissioning has not entered into a network). Such known operator as Accor did not plan the presence in Ukraine until recently at all, however, it seems reasonable to expect changes of this operator intention. There are brands of 3-star hotels in its management which can be demanded and their parameters of ROI can be of interest even to Ukrainian investors.

Foreign countries' Regional hotel networks demonstrate their interest in Ukrainian market (the number of tourists coming from these countries to Ukraine has increased in 2008: from Slovakia - in 2.5 times, Poland – 2.2 times, the USA – 1.7 times, Italy – 1.6 times, France – 1.5 times, Turkey - by 43.0 %, Germany - by 24.8 %.) It does their national hotels' brands attractive as loyalty of tourists to "their" brands in another country is rather high, due to which hotels of the given networks can receive target audience at once.

Ukrainian hospitality business is at the stage of its development and with every year becomes one of the most dynamically developing and profitable fields of the country's economy. Undoubtedly, it became possible on the basis of total political, economic, social, demographic, geographical, ecological and other factors.

String of the pronounced facts indicates about it. The most significant factor of situation changes at the domestic hospitality market is the economic one: structural changes in the economy, external economic activity, macroeconomic indicators, financial results of enterprises and organizations, price and tariff indices which have an essential influence on positive dynamics of Ukrainian hotel business.

It should be mentioned that macroeconomic indicators in Ukraine during the last years were stable: according to the data of British Agency Fitch Ratings the economic growth rate made up 7.5 % annually.

In January-April 2008, real GDP constituted 106.2% as compared with the relevant period of the previous year.

During 2007, exports of foreign trade in goods to EU countries made up \$13.9 billion and increased in comparison with 2006 for 15.1%; correspondingly import – \$ 22.2 billion and 37.2%.

The profitability of 4-5star Kiev hotels exceeds 40% that is not the least of the factors of Ukrainian hospitality development. The average fallibility is 60-85%.

It is significant to note that the volume of direct investments from EU countries by 01.01.2008 made up \$22.9 billion which make up 77.8% of the total investment to Ukraine (01.01.2007 – \$16.3 billion, 75.2%).

There is a bank lending boom (the increase for 76% since January to June).

On the 16th of May, 2008 Ukraine became the 152nd member of the World Trade Organization. Geographical and geopolitical location promotes development of tourism and hospitality of Ukraine but special attention should be paid to unique natural and climatic recourses, historical and cultural inheritance.

Beneficial climate of the Black Sea and the Sea of Azov, the Crimea, the Carpathian Mountains is widely used practically at all resorts as the main medical and health-recreation factor. Among health-improving resources the considerable reserves of therapeutic mud and numerous deposits of mineral water should also be noted.

Definite influence upon the hotel business development has political factor and legal framework:

Improvement of the investment climate in Ukraine depends to a large extent on the creation of the efficient system of institutional activity support

of foreign investors, the priority of which is successive politics of executive pressure softening on investors.

Economy of Ukraine reacted easily to the political instability of the last years - two elections to Verkhovna Rada for 18 months, three government changes since the beginning of 2005.

We cannot fail to note about the development of cooperation between Ukraine and the World Tourism Organization (WTO) that is the priority area of public policies in the development of international tourism and an important prerequisite for the integration of Ukraine into the world travel space.

Also an important fact is the opening of borders, visa free entry to Ukraine for representatives from EU countries, the Swiss Confederation, the Principality of Liechtenstein, Japan, Bulgaria and Romania.

By the decree of the President of Ukraine № 136/2007 "About activities connected with the tourism and resorts development in Ukraine" the 2008 was declared as the Year of Tourism and Resorts in Ukraine.

The President of Ukraine decreed to develop and approve "The strategy of stable development of tourism and resorts in Ukraine". It should help to create favorable conditions for catalyzing tourists' and resorts' investments, to implement mechanisms to stimulate construction of new and renovate operating tourism and resort infrastructure, to practice different activities for positive boosting of positive travel image at the international tourism market by creating a network of Tourist IC in Ukraine and tourist agencies abroad.

At the same time among the important events of the last year it is worth noting the return of budgetary financing of expenses for the development of tourism and resorts. 20 million UAH was given for these purposes.

Preparation of the country to receive guests of European Football Championship in 2012 greatly influenced on the dynamics of hospitality development. The law "About organizing and conducting the final part of European Football Championship 2012 in Ukraine" was passed. It is important to note that investors will receive benefits for the infrastructure construction.

On December 26, 2007 the Law of Ukraine № 877-V "On the main regulations of state control in the sphere of economic activity" joined into force which aimed to introduce proper order in the implementation of state control.

The new version of Rules of obligatory services certification for temporary accommodation which are provided by parties of tourist activities in the joint and individual means of accommodation (27.12.2007 for №

1418/14685) was approved. This will significantly improve the quality and control over services.

Thus the adoption of several important legal acts will promote development of the market and allow solving quantities of disputable issues currently existing in this field.

Demographic and socio-economic factors as well as incomes, health protection, social welfare, education have their particular influence.

Hotel business development depends to a large extent on the fact that during the 2007, 23 million foreign citizens visited Ukraine, what is almost 4 million more in comparison with the previous year.

Structure of tourists' flow by purpose

	2006	2007
Business trip	1 011230	908 964
Organised tourism	1 210156	1 444962
Private visit	16 552159	20 563044
Education	45 262	49 481
Placing in a job	4 623	7 814
Immigration	15 778	24 032
Cultural event, sport event, religion, other	96 567	123 860

- Based on data from the Administration of State Frontier Service of Ukraine
Source: © SSC of Ukraine

At the same time the priority type of tourists' activities in Ukraine remains internal tourism. During the 9 months the growth rate was 74% while for the same period in 2006 - 47%.

Significant influence has the increase of domestic and foreign business tourism and the growth of business activity inside the country.

Factors that have become catalysts for the dynamic development of the hotel market in Ukraine:

- Mainly the conducting of the UEFA championship Cup - Final in 2012 jointly with the Republic of Poland catalyzed the interest of investors.

- Determining influence is also experienced by the organization of youth football (soccer) UEFA championship in 2009 in Donetsk.

- Conducting annual meeting of EBRD in 2008 in Kiev.

It is well known that hotel industry is entirely oriented to the consumer and directly depends on the quality of the services provided. External factors of low efficiency of hotel enterprises greatly influence the formation of the hotel market. The problem of low-quality service is rather typical for Ukrainian hotel market due to the influence of old Soviet school.

Over the past years international public hotel operating companies actively show interest and make negotiations about possible projects. In many ways appearance of international brands and hotel management companies in the Ukrainian hospitality market is a natural development indicator of hotel sector of Ukraine.

Currently three public hotel operating companies Global Hyatt Corporation (in July 2007, five-star hotel Hayatt Regency “ Saint Sofia Kiev” started operating under Hyatt brand), Rezidor Hotel Group (2005 – four-star Radisson SAS Hotel Kyiv), Rixos Hotel (2005 – five-star Rixos Hotel Pri-karpatye) are doing business in Ukraine now and one national managing company “Premier International” which represents “Premier Hotels”. Hilton Hotels Corporation, InterContinental Hotels & Resorts, Marriott International, Kempinski Hotels&Resorts and Accor Group wanted to enter Ukrainian hotel market. In 2007 InterContinental Hotels & Resorts, Hilton Hotels Corporation, Starwood Hotels & Resorts, Marriott International, Accor Group, InterContinental Hotels & Resorts, Magic Life, Kempinski Hotels&Resorts, Continent Hotels & Resort, Choice Hotel International, Wyndham Worldwide announced their close interest in Ukraine.

Conclusions. As a whole, it is possible to predict formation of national networks in the nearest future due to the consolidation in the market (for example: Premier Hotels) and rather active entering into the Ukrainian market of the foreign hotels’ networks (at present there are 2 hotel rooms per 1,000 Ukrainians; this demonstrates the presence of attractive and yet not occupied niches) which can invest significantly in construction of the new hotels as well as renovation of the old hotel facilities. All that would allow to improve the quality of service and to reduce the price of services to the Central European level.

Thus the dynamics of Ukrainian hospitality development can be estimated as positive. Ukraine has a great potential and opportunities for further development of hotel industry and tourism, efficient use of natural and recreational, historical and cultural, tourist & excursion resources, complete satisfaction of the health-improving & sports, cognitive, spiritual needs of domestic and foreign tourists and favourable conditions for investment activation. In 2007, investments in hotel development sphere constituted 12 billion UAH which is 0.7% higher comparing to the previous year. Dur-

ing January-March 2008 the volume of provided services made up 573 million UAH and for the same period of the last year – 392 million UAH.

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Отримано 15.03.2009. ХДУХТ, Харків.

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УДК 658.7: 004.78

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ІННОВАЦІЙНЕ ПІДґРУНТЯ ЛОГІСТИЧНИХ ПРОЦЕСІВ СУЧАСНИХ ТОВАРОПРОВІДНИХ СИСТЕМ

Розглянуто проблеми інноваційного розвитку товаропровідних систем на підставі сучасних інформаційних концепцій та наведено огляд програмного забезпечення взаємодії учасників логістичного ланцюга.

Рассмотрены проблемы инновационного развития товаропроводящих систем на основе современных информационных концепций и приведен обзор программного обеспечения взаимодействия участников логистической цепи.

Problems of innovative development of trading systems on the basis of modern information concepts and the review of the software of interaction of logistical participants

Постановка проблеми у загальному вигляді. Ринок покупця вимагає відповідної здатності товаропровідних систем з'єднати індивідуальні споживчі потреби до товарної пропозиції з своєчасним і якісним постачанням, тому саме зменшення часу обробки та виконання замовлень, скорочення резервних запасів і організація необхідного рівня сервісу є вирішальними факторами в конкурентній боротьбі та економіці майбутнього. Рішення проблеми індивідуалізації замовлень клієнтів можливо тільки за допомогою гнучкої системи управління протягом всього логістичного ланцюга від виробника до кінцевого споживача товарів [1; 2]. У свою чергу, підприємства, що є учасниками логістичного ланцюга товароруку, повинні взаємодіяти в єдиному інформаційному просторі, де інформація надходить у відповідні інстан-