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INTERNATIONAL HOTEL CHAINS AND GROUPS IN POLAND

Abstract: One of the most characteristic phenomena in the world's hotel industry in the 20th century is the internationalisation of business operations. It is manifested *inter alia* through the expansion of hotel chains on new geographic markets. Today, the most "global" hotel groups are present in several dozen countries on six continents. This study aims to track the process of including Poland in the area of activity of international hotel corporations. It comprises an analysis of the location, time and methods employed by international hotel companies when entering the Polish market.

Key words: international hotel chains, globalisation, hotels in Poland

Factors of expansion of hotel groups on international markets

The first hotel companies operating internationally appeared at the beginning of the 20th century¹, but the phenomenon developed on a larger scale after World War II, mainly as a result of the expansion of American hotel chains such as Intercontinental Hotels, Sheraton Hotels and Hilton Hotels. Particular acceleration of the development of hotel companies based on international markets began towards the end of 1970s.² In 1995, international hotel corporations had as many as 16,184 hotels with 2,159,000 rooms or 19% of hotel facilities worldwide (Litteljohn 1997). As stated by A. Kowalczyk (2001), in the United States in the mid-1990s as much as 45% of all hotels were part of groups controlled by foreign capital. In Europe that figure was 30%, and in Latin America – 12%. Currently, the largest hotel groups operate in several dozen countries of the world and fully deserve to be termed global enterprises (Tab. 1).

¹ The following *inter alia* are considered to have pioneered the international hotel industry: Ritz Hotels (since 1907), and the American Hotel Corporation (Lundberg et al. 1993).

² The phenomenon is broadly discussed in the publication by A. Kowalczyk *Geografia hotelarstwa* [Geography of the hotel industry] (2001).

Tab. 1. Hotel groups operating in the largest number of countries in 2000

Name	Number of countries
Bass Hotels & Resorts*	98
Best Western International	84
Accor S.A.	81
Starwood Hotels & Resorts	80
Carlson Hospitality Worldwide	57
Marriott International	56
Hilton International	53
Forte Hotel Group	51
Club Mediteranéé SA	40
Choice Hotels International	36
Hyatt Hotels / Hyatt International	35
Sol Meliá	27
Airtours Group	23
Cendant Group	23
Hilton Hotels Corporation	20

* currently Six Continents

Source: HOTELS' Giant Survey 2000

the same standard of service. In such circumstances, a well-known hotel brand stands for a guarantee of service quality, which, among others, affects the popularity of hotels organised in chains.

The location of hotels is determined to a large extent by the directions of tourist traffic. New hotels are established either in regions which have traditionally been in high demand, or where there are realistic possibilities of increasing demand in the nearest future (Knowles 2001). That is why the traditional areas of expansion for hotel chains continue to be Western and Southern Europe and North America, which attract half of the total number of international tourists. And it is Eastern and South-Eastern Asia and the Pacific Region that have become new attractive markets, in terms of the rate of increase in the number of foreign tourists. These regions noted, during 1980-1995, the highest increase in the number of beds in hotels worldwide and, consequently, their share in the world accommodation facilities increased from 4.7% to 14.4% (Kowalczyk 2001).

A factor contributing to the geographical expansion of hotel groups is also the intention to diversify business operation risks. Development on one market would provide benefits of economies of scale but, in the event of a recession, the entire company

The changes taking place in the hotel sector are due, above all, to the characteristics of demand for accommodation services generated principally by tourist traffic. The development of international hotel companies was the natural consequence of an immense growth in the number of trips abroad made after World War II³. Entering foreign markets, hotel chains responded to the need of tourists for finding safe accommodation abroad. Using the names of companies with established reputations, they offered the same or similar packages and quality of services worldwide, thus helping their customers make decisions during their trips abroad. No international accommodation classification system has been established up to date; hence, despite the common application of the star symbols, a similar number thereof applying to facilities in different countries does not necessarily mean

³ According to WTO data, the number of foreign trips increased in 1950-2001 from 25.8 to 692.7 million.

would be affected. Activity on many markets enables the distribution of risk and making up for losses incurred in one area with profits generated elsewhere, due to differences in economic prosperity between particular regions of the world (Knowles 2001). An example is provided by the surveys of the impact of the terrorist attack on the WTC in New York (on 11 September 2001) on results in the hotel sector. This event caused a drop in tourist trips of US citizens and, as a consequence, worse financial results of hotels operating in the USA and on other dependent markets, mainly in resorts of Latin America and the Caribbean. European markets, on the other hand, characterised by strong intra-continental demand, suffered much less (the exceptions being London and Paris)⁴.

Globalisation of the hotel sector was made possible *inter alia* through the integration and mergers of companies internationally. Like other service markets, the hotel industry has accelerated over recent years the rate of consolidations and takeovers among the world's largest companies. In the 1990s, as a result of mergers or takeovers of independent chains, large hotel groups began to develop; these are not infrequently owned by consortia with very broad ranges of activities. Thus, for instance, the brewery and owner of catering facilities Bass (now Six Continents) became the owner of, successively, Holiday Inn (1989-1990), Inter-Continental (1998), Southern Pacific Hotels Corporation in Australia (2000), Bristol Hotels & Resorts (2000), Posthouse (2001) chains, as well as single hotels in different parts of the world⁵. The locations of hotels that are the subjects of investments, indicates the directions in which hotel companies are expanding. The Accor group has entered the North American market of economy-class hotels through the acquisition in 1990 of the Motel 6 chain, and it still operates under that brand (Accor... 2001)⁶.

Large international corporations owe their development not only to the availability of capital enabling them to develop and purchase single facilities or whole hotel chains. It is increasingly frequent that various forms of co-operation with the owners of hotels are used as methods of extending hotel facilities. Most popular activities of that type include franchising agreements, management contracts, joint ventures and marketing agreements.

Knowles (2001) states that chain hotels note occupancy rates of ca. 10% higher than the average figure for the hotel sector. They benefit from being included in central reservation systems, promotional campaigns and the brand name's marketing power. With the signing of franchising agreements, private hotel owners increase their competitiveness through *inter alia* the possibility of using proven patterns when constructing and furnishing their facilities, training staff and organising work,

⁴ Based on the results of market analyses performed by Jones Lang La Salle Hotels and Andersen Hospitality Consulting, found on www.hotel-online.com and www.hotelbenchmark.com.

⁵ Based on information presented on www.6c.com.

⁶ The Motel 6 chain is the equivalent of the Formule 1 chain developed successfully by Accor since 1985 on the European market. Also, concerning economy-class hotels with a broader ranges of services, Accor is developing on the European market a chain of Erap hotels (since 1991), while its takeover of Red Roof Inns (in 1999) enabled it to enter the US market.

while maintaining control over the company's operations. The franchiser is given the possibility of fast expansion to increase its share in selected markets with a small risk involved in the undertaking of such a venture (Pine et al. 2000).

More and more often hotels are being established in the world upon the initiative of financial institutions, industrial, construction and other companies, which then entrust their management to specialised firms. Such arrangements, referred to as "management contracts", are often entered into with international hotel companies, which, in addition to the experience of the management body, allows the hotels to experience the benefits of being part of a chain. With a financial commitment that is smaller than in the case of an acquisition, a management contract offers the hotel company the possibility of controlling and directing the hotel. It is particularly important in managing high-class hotels as it facilitates the maintenance of quality standards expected by the clients using the services of a particular chain.

Franchising and the signing of management contracts as development strategies are being successfully used by the largest worldwide hotel chains. Franchising is used, for example, by Cendant Corp., to include new hotels in its chain (in 1999-99% of hotels of that group operated under a franchising agreement), Choice Hotels Intl (100%), Carlson Hospitality Worldwide (94%), Bass Hotels & Resorts (89%) and Hilton Hotels Corp. (80%). In the case of the Marriott Intl group, 53% hotels in 1999 operated under franchise arrangements, 40% worked under management contracts, while for Starwood Hotels & Resorts/Starwood Hotels & Resorts Worldwide, these figures were 42% and 29% respectively⁷.

Expansion on international markets is due, on the one hand, to the benefits such strategy may yield to hotel companies and the possibilities for the development of investment target areas on the other. This is particularly advantageous for the "emerging" markets for which the attracting of foreign investment offers the chance of catching up with highly developed countries. S. Kusluvan and K. Karamustafa (2001) list the following potential benefits of the presence of international hotel firms in developing countries:

- provision of capital to fund hotel investment projects,
- transfer of technological and managerial skills,
- ensuring broad market relations,
- market efficiency and effectiveness,
- assurance of quality of service and security to visitors,
- positive image of the destination,
- increased competitiveness and quality of services on the market,
- demonstration effects for local entrepreneurs.

The authors cited above point out simultaneously possible negative effects (such as decreased economic benefits, inappropriate scale and form of tourism development, investment risk, dependence of the local economy on international companies, negative impact on the environment and culture) which, nevertheless, may be controlled by appropriate policies of the authorities.

⁷ According to *Hotels* journal as found on www.hotelsmag.com.

Activity of international hotel groups and chains in Poland during 1974-2002

The first hotels operating under international groups appeared in Poland in the mid-1970s. The decision to build facilities under the so-called “investment import” with borrowed foreign currency, with the involvement of foreign construction companies, was to contribute to modernising the Polish hotel industry and accelerate the development of hotel accommodation (Kwiatkowski 1982). All import projects were carried out at the time for the state-owned PP Orbis company. For some of the planned facilities, license agreements were signed with international hotel chains permitting the use of their logos, reservation systems and promotional programmes. The first such agreement was made in 1971 between PP Orbis and the Inter-Continental Hotels Corporation (IHC) concerning the prospective hotel to be built in Warsaw under investment import arrangements. The Forum Hotel commenced its operations in 1974 as a four-star hotel. There were 751 rooms (it is still Poland’s largest hotel). In that same year, construction began also in Warsaw, of the IHC’s second hotel – the Victoria Inter-Continental (370 rooms). The first luxury hotel in Poland to appear after World War II was opened to guests in 1976 (Osmola 1991).

During 1975-76, six hotels were opened (in Olsztyn, Poznań, Sosnowiec, Wrocław, Warsaw and Gdańsk) with a total of 865 rooms, which were granted the Novotel chain license (chain owned by the Société Internationale d’Exploitation Hôtelière Novotel). Hotels of that chain in Poland were classified as four-star ones.

Holiday Inn is the third international brand, which entered the Polish market in the 1970s. A hotel in Cracow became part of the world’s largest hotel at the time under a license agreement between Holiday Inn Inc. and PP Orbis. The hotel with 308 rooms began its operations in 1976⁸.

The difficult economic and political situation in Poland at the end of the 1970s and in the 1980s found its reflection in the hold-up of hotel construction projects⁹. A characteristic example is the history of development of the hotel in Konopnickiej Street in Cracow. Its construction, initiated in 1976, was stopped in 1980 and resumed only in June 1986. The four-star hotel began operating after 12 years of construction work (1988). Under a franchising agreement concluded with IHC in 1985, the hotel was made part of the Forum chain (Kruk 1999). With that venture, the process of including Polish hotels in international chains was resumed. Up to the end of the 1980s, two other hotels were established: Holiday Inn (1989)¹⁰ and Marriott (1989), both in Warsaw.

⁸ The hotel lost its right to use the Holiday Inn name in 1995.

⁹ During 1975-1980, the tourist management authority [*Zjednoczenie Gospodarki Turystycznej*] was allocated 75% less funds for capital projects than during 1971-1975 (Kwiatkowski 1982).

¹⁰ Due to the impossibility of obtaining a loan upon suitable terms, Orbis entered into a leasing agreement with the Austrian company Warimpex, which provided for the funding of the project by the Austrian partner and Orbis was made the hotel administrator for a period of 8.5 years. Following the expiry of that period and repayment of the lease rent, Orbis was to become the owner of the hotel (Wysocki 1989).

The creation of the Marriott hotel marked a new stage in giving an international dimension to the Polish hotel industry. It was the first chain hotel in Poland not associated with PP Orbis. A joint venture was established in 1987 by the Polish airline company, PLL LOT, an Austrian construction company and the Marriott Corporation to construct the hotel. It was the 500th Marriott hotel in the world, and the first in Eastern Europe. Marriott Corp., as the first international hotel group in Poland, is not only the co-owner of the building but it also manages the hotel.

In 1990, there were 12 hotels in Poland owned by international hotel chains, with a total of 3,435 rooms, which constituted ca. 10% of Poland's hotel facilities (Fig. 1).

The change in the social and political situation in Poland, and the economic revival at the beginning of the 1990s, did not cause an automatic inflow of inward investment and development of international contacts in the hotel sector. Prospective investors assessed economic development, political stability, the situation on the tourist market, the degree of foreign capital commitment, and conditions for investment created by central and local government authorities. There were different perceptions of the situation in Poland, as in other Central and East European countries, which are illustrated by statements from representatives of hotel sector companies. In the mid-1990s, Choice Hotels expressed an opinion that Eastern Europe was a region of economic stagnation lacking in prospects for tourism development and suggested caution in engaging capital in the region. A different position was presented by Radisson SAS Hotels Worldwide, according to which that market offered prospects for tourist investment even though it was only just developing (R.F. Iunius et al 1999).

R.F. Iunius and C. Johnson (1999) listed, among the main barriers to entering the markets of Central and Eastern Europe, bureaucracy, corruption, high import taxes, lack of clarity of ownership statuses for many properties, backward technology and obsolete equipment, difficulties in finding appropriate business partners. Factors encouraging investment in the region included: prospects of strong economic growth,

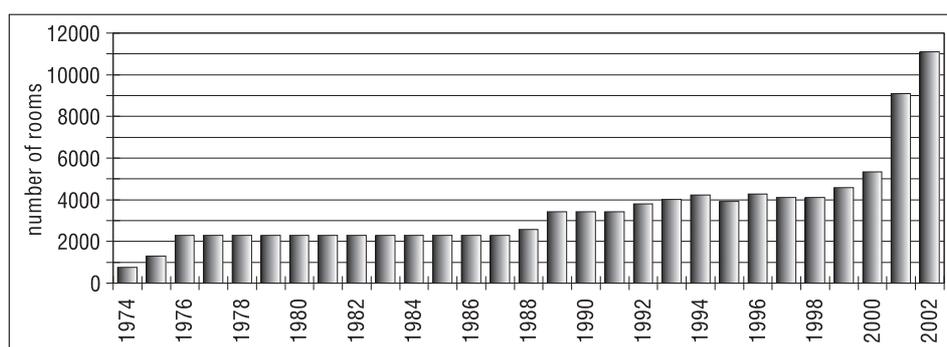


Fig. 1. Number of rooms in hotels in Poland included in international hotel chains during 1974-2002

Source: own study

the possibility of locating investment projects close to main markets, relatively cheap and well educated labour, increasing macroeconomic stability and degree of openness to foreign commercial relations, government policy encouraging foreign investment, numerous areas with untransformed landscape, cultural affinity and increasing awareness by authorities that tourism is a factor of growth of international exchange.

In Poland, during 1990-1998, only four hotels were included in international chains, and license agreements were terminated with two hotels (Holiday Inn in Cracow and Novotel in Sosnowiec). The total number of rooms in facilities associated with international hotel chains increased until 1998 by ca. 20% as compared with 1990.

In 1992, a hotel commenced its operations in Szczecin, operating under a management contract by the Radisson chain (since 1994, Radisson SAS), belonging to the Carlson group. In 1993, the Bristol Hotel was officially opened in Warsaw, owned since 1991 by a joint venture where a majority of shares was taken over by the British group of Forte Hotels Plc. Forte refurbished that heritage building, closed down since 1981, restoring its former splendour, and undertook the management thereof¹¹. In 1998, the hotel was renamed Le Royal Meridien Bristol upon its inclusion in the Le Meridien Hotels and Resorts chain then owned by the Forte company¹². The hotel's top world-class status is attested by its membership in the prestigious organisation of The Leading Hotels of the World.

One of the most important foreign investments in Cracow at the beginning of the 1990s was the establishment of the Ibis chain hotel (1993). In this manner, Accor system (formerly S.I.E.H. Novotel), extended its offering in Poland to include economy-class hotels.

Since 1996, a luxury hotel in the centre of Warsaw has been owned and managed by ITT Sheraton Corp. (since 1998 part of Starwood Hotels & Resorts Worldwide).

We can talk of acceleration in the rate of including Polish hotels in international chains since 1999 (Fig. 1). The number of rooms in such hotels increased in 1999 by 11% compared with the previous year (three hotels, 470 rooms), in 2000 by ca. 17% respectively (five hotels, 761 rooms), in 2001 by 70% (21 hotels, 3,737 rooms), in 2002 by 22% (12 hotels, 2,009 rooms).

The largest transaction during that period related to the privatisation of Orbis S.A., a company owning the largest number of hotels in Poland (56 hotels, 10,500 rooms in 29 cities and tourist centres), for which the State Treasury sought a strategic investor. The company that was finally selected was Accor S.A., which, in accordance with the agreement of July 2000, became the owner of 20% of shares in Orbis¹³. At the same time, a franchising agreement was signed, which provided for the inclusion by the end of 2004 of 29 Orbis hotels into the chains owned by Accor: Ibis, Mercure, Novotel,

¹¹ From 1989, there were similar plans concerning the Europejski hotel in Warsaw with the Kempinski system interested in investing in its modernisation. Those plans were never realised.

¹² Currently the Le Meridien chain is owned by the Japanese company Nomura.

¹³ Accor S.A.'s competitor was the Bass Hotels & Resorts group (owner of such brands as Holiday Inn, Inter-Continental and Forum). The advantage of both companies was their long-term presence on the Polish market based on co-operation with Orbis.

Sofitel, Etap Hotel, Formule 1. As a result, the process of internationalising the Polish hotel industry was considerably accelerated. By the end of 2002, two Orbis hotels were renamed Sofitel, five others (in addition to the existing ones) – Novotel, and nine – Mercure. The integration with the Accor group related to the parallel withdrawal of Orbis from its co-operation with Bass Hotels & Resorts (currently Six Continents) and, as a result, in 2001 the Inter-Continental brand disappeared from the Polish market and, in 2002 – the Forum brand. Moreover, the Accor group invested during that period in its own facilities, mainly of the Ibis (eight), Novotel (two) and Mercure (one) hotels¹⁴. To date, no hotel has been established within the Formule 1 and Etap Hotel chain that comprises budget hotels.

Another important franchising agreement, under which Poland is to have new chain hotels, was signed in 1996 between Bass Hotels & Resorts and a company with American capital, Global Hotels Development Group Poland S.A. The agreement provides for the construction by GHDGP of 20 hotels over a period of ten years, which will operate within the Bass chains of Holiday Inn, Crowne Plaza and Express by Holiday Inn. The only hotels established to date include Holiday Inn opened in 1999 in Gdańsk and, by 2002, also in Kraków, Wrocław and Katowice.

Since 1999, the French chain of Campanile (Envergure group) has been operating in Poland, which has decided to engage its own funds in the construction of hotels. By the end of 2002, hotels began operating in Katowice, Cracow, Szczecin and Wrocław.

During 2000-02, the following international brands also appeared on the Polish market: Best Western (Poznań, Wrocław, Cracow and Ożarów Mazowiecki), Dorint (Wrocław), Sorat (Lublin), Hyatt Regency (Warsaw). In 2002, two new facilities (in Warsaw and Wrocław) came under the management of the Radisson SAS chain.

Until 2002, the total number of rooms in hotels included in international hotel chains increased by 169% compared with 1998.

International hotel chains and systems in Poland in 2002

On the Polish hotel market there are now a total of 14 hotel chains represented by 55 facilities with 11,095 rooms (Tab. 2). A major part of these is within the disposal of the Accor group (33 hotels, 6,929 rooms).

International companies engage in operations in Poland on a major part of the hotel market. As a result, hotels with different standards of services have been created (from luxury to economy), even though most of them use brands that qualify them as medium-class ones. To date no budget-class hotel has been established despite the high profitability and popularity of such facilities in Europe and the USA. Investment plans of international companies in that respect are hampered by the lack of progress in the construction of motorways the proximity of which is the traditional location for economy and budget class hotels. The introduction of Etap and Formule 1 hotels would increase the range of products of the Accor group, which now has the widest offer among international hotel groups in Poland (four chains). Other hotel groups introduced,

¹⁴ In 2003, these hotels are to be included in the Orbis hotel chain.

Tab. 2. International hotel chains and systems in Poland in 2002

System	Chain	Segment	Location	Number of rooms	Came to Poland in
ACCOR	SOFITEL	upscale	Warsaw Cracow	590	2001
	NOVOTEL	midscale	Olsztyn Poznań (2) Wrocław Gdańsk (2) Warsaw (2) Cracow (2) Szczecin Katowice	3110	1975
	MERCURE	midscale	Warsaw Poznań Wrocław Jelenia Góra Lublin Opole Częstochowa Gdańsk Toruń Szczecin	1807	1999
	IBIS	economy	Cracow (2) Warsaw (2) Poznań Łódź Częstochowa Zabrze Szczecin	1422	1993
SIX CONTINENTS Hotels International	HOLIDAY INN	midscale	Warsaw Gdańsk Cracow Wrocław Katowice	949	1976
BEST WESTERN International, Inc.	BEST WESTERN	midscale	Cracow Wrocław Ożarów Mazowiecki Poznań	389	2000
Groupe ENVERGURE	CAMPANILE	economy	Katowice Cracow Szczecin Wrocław	380	1999
CARLSON HOSPITALITY WORLDWIDE	RADISSON SAS	upscale	Szczecin Wrocław Warsaw	840	1992
MARRIOTT International Inc.	MARRIOTT	upscale	Warsaw	523	1989

System	Chain	Segment	Location	Number of rooms	Came to Poland in
STARWOOD Hotels & Resorts Worldwide	SHERATON	upscale	Warsaw	352	1996
NOMURA International, Plc.	LE MERIDIEN	luxury	Warsaw	206	1998
HYATT Hotels & Resorts	HYATT REGENCY	luxury	Warsaw	250	2002
DORINT Hotel Group	DORINT	upscale	Wrocław	205	2001
SORAT Hotels*	SORAT	midscale	Lublin	72	2002

* until November 2002

Source: own study

by 2002, only one product each from their ranges for the selected market segment (e.g. the Envergure group invested until now in economy class hotels of Campanile, Carlson in Radisson SAS hotels intended for the upscale segment, Six Continents in medium-class hotels – Holiday Inn). The new projects announced and already commenced will change that situation, also due to the operations of the Six Continents group whose portfolio will increase over the coming years to include the economy hotels of Express by Holiday Inn, and higher-class hotels of Crowne Plaza and the luxury Inter-Continental. New brands are also intended to be introduced by the systems of Envergure (Kyriad, Première Class), Starwood Hotels & Resorts (Westin) and Marriott International Inc. (Ramada)¹⁵.

Hotels belonging to international chains in Poland are almost exclusively hotels in cities, mostly oriented at serving the broadly understood business tourism. Eighty percent of these are located in city centres, and the rest in suburban zones, usually close to roads leading out of the cities. Two hotels only (Best Western in Ożarów Mazowiecki by the Warsaw–Poznań road and Novotel in Warsaw sited between the city and Okęcie airport) can be included among transit-type hotels. The lack of a network of motorways in Poland restricts the development potential of such facilities. Until 2002, international hotel groups did not decide to locate their facilities in resorts. It can be presumed that they do not consider the Polish resort tourism market to be well enough developed or the tourist attractions of our country are not sufficiently known of internationally.

In 2002, chain hotels operated in a total of 16 locations in Poland (Fig. 2). The highest number of these is located in Warsaw (12 hotels, 3,871 rooms), which, as a result, has 35% of rooms in chain hotels. The country's largest city, and at the same time the political, economic and financial centre, concentrates the largest number of higher-class hotels (six upscale and luxury hotels¹⁶). Ten out of fourteen hotel chains

¹⁵ Based on information from journals and dailies specialising in this sector, and websites such as www.eurobuild.pl, www.polandproperty.pl, www.rzeczpospolita.pl, www.pulsbiznesu.com.pl.

¹⁶ Four other hotels of this type are planned to be constructed (Inter-Continental, Crowne Plaza, Westin and Hilton chains).

operating in Poland have located their hotels in Warsaw. A considerable number of hotels operating within international chains is also found in Cracow (8), Wrocław (7), Poznań (5), Szczecin (5) and Gdańsk (4).

Conclusions

Four stages can be identified in the process of international hotel groups entering the Polish market. The first, during the second half of the 1970s, relates to the implementation of centrally made decisions on the construction of modern hotels under investment import arrangements, to be used to serve foreign incoming tourism. Some of those hotels were granted licenses from international groups and that was how hotels such as Forum, Inter-Continental, Holiday Inn and Novotel (a total of nine hotels) commenced their operations in Poland.

The second period – 1980-1988 – was marked by economic stagnation in the country and the impediment of tourist investment projects undertaken by the state. Only one hotel connected with an international company was established then (Forum in Cracow), completed after 12 years of construction.

All hotels operating under international systems constructed in Poland during those periods belonged to the state-owned enterprise Orbis.

The third period, between 1989-1998, spanned the first ten years after the beginning of comprehensive changes. Liberalisation of economic life made it possible to involve the private sector and foreign entities in hotel projects, and the shortage of hotel accommodation favoured the undertaking of investment projects. New chain hotels began to gradually appear in Poland (six hotels) and were established mainly owing to investment projects of foreign companies or joint-venture initiatives. Existing hotels were joined by Marriott, Radisson SAS, Sheraton, Le Meridien and Ibis hotels. Some hotels (two) belonging to Orbis lost their right to use international brands. The ownership status and management methods began to vary.

An acceleration of the increase in the number of hotels operating under international chains has been noted in Poland since 1999. The 41 hotels included in hotel chains during 1999-2002 comprised of hotels such as Mercure, Novotel, Sofitel, Hyatt, Dorint, Sorat, Best Western and Campanile. The Accor group became the leader on the market of chain hotels with 33 hotels in Poland by 2002. This stage is not over yet as other numerous hotels are planned which, under ownership, management contracts or franchising, are to form part of international hotel systems.

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Międzynarodowe łańcuchy i systemy hotelowe w Polsce

Streszczenie

Jednym z najbardziej charakterystycznych zjawisk w XX w. światowym hotelarstwie stało się umiędzynarodowienie działalności gospodarczej. Wyraża się ono m.in. w ekspansji łańcuchów hotelowych na nowe rynki geograficzne.

W procesie wchodzenia międzynarodowych systemów hotelowych na polski rynek hotelarski można wyróżnić 4 etapy. Pierwszy, obejmujący 2 połowę lat 70. związany jest realizacją decyzji centralnych o budowie nowoczesnych obiektów hotelowych

w ramach importu inwestycyjnego, z przeznaczeniem na obsługę zagranicznego ruchu przyjazdowego. Część tych obiektów uzyskała licencje międzynarodowych systemów hotelowych i w ten sposób rozpoczynają działalność w Polsce hotele Forum, Inter-Continental, Holiday Inn i Novotel (razem 9 hoteli). Drugi okres – lata 80. – to okres zahamowania inwestycji turystycznych Państwa z uwagi na kryzys gospodarczy i polityczny w kraju. W tym okresie powstał tylko jeden hotel związany z międzynarodową firmą (Forum w Krakowie), ukończony po 12 latach od rozpoczęcia budowy. Wszystkie hotele związane z międzynarodowymi systemami hotelowymi budowane w Polsce w powyższych okresach, należały do Przedsiębiorstwa Państwowego Orbis.

Trzeci okres to lata 1989-1998, pierwsze dziesięciolecie po rozpoczęciu przemian systemowych. Liberalizacja życia gospodarczego pozwoliła na zaangażowanie w inwestycje hotelarskie podmiotów sektora prywatnego oraz podmiotów zagranicznych, podejmowaniu działań inwestycyjnych sprzyjał niedobór miejsc hotelowych w kraju. Stopniowo zaczęły pojawiać się w Polsce nowe hotele międzynarodowych korporacji (6 obiektów), powstałe głównie dzięki inwestycjom firm zagranicznych lub inicjatywom typu joint-venture. Do istniejących obiektów dołączyły hotele Marriott, Radisson SAS, Sheraton, Le Meridien, Ibis. Niektóre hotele należące do PP Orbis tracą prawo posługiwania się międzynarodową marką (2 obiekty). Następuje różnicowanie własności i form zarządzania hotelami.

Od 1999 r. obserwuje się przyspieszenie wzrostu liczby hoteli międzynarodowych firm w Polsce. Wśród 41 obiektów włączonych do łańcuchów hotelowych w latach 1999-2002, pojawiły się hotele Mercure, Novotel, Sofitel, Hyatt, Dorint, Sorat, Best Western, Campanile.

W 2002 r. na polskim rynku hotelarskim funkcjonowało 14 łańcuchów hotelowych reprezentowanych przez 55 obiektów z 11095 pokojami hotelowymi. Większą częścią tego typu bazy dysponował system Accor (33 hotele, 6929 pokoi). Łącznie w 2002 r. hotele międzynarodowych firm działały w 16 miejscowościach w Polsce. Najwięcej obiektów zlokalizowanych jest w Warszawie (12 hoteli, 3871 pokoi), która dysponuje w efekcie 35% pokoi w hotelach międzynarodowych korporacji. Znaczną liczbę obiektów funkcjonujących w ramach międzynarodowych łańcuchów posiada także Kraków (8 hoteli), Wrocław (7), Poznań (5), Szczecin (5) i Gdańsk (4).

Ostatni okres nie jest zakończony, gdyż w trakcie realizacji i w sferze planów są dalsze, liczne obiekty, które na zasadzie własności, kontraktu menedżerskiego, umów franchisingowych lub porozumień marketingowych mają stać się częścią światowych systemów hotelowych.

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