

**METODA ZYSKÓW**

**(materiały informacyjne)**

**Metoda zysków – zajęcia warsztatowe z metody zysków   
na przykładzie wyceny nieruchomości hotelowej.**

Prowadzący: Piotr Cegielski

Planowany termin warsztatów:

**Termin I** - 7-8 listopada 2019 r.

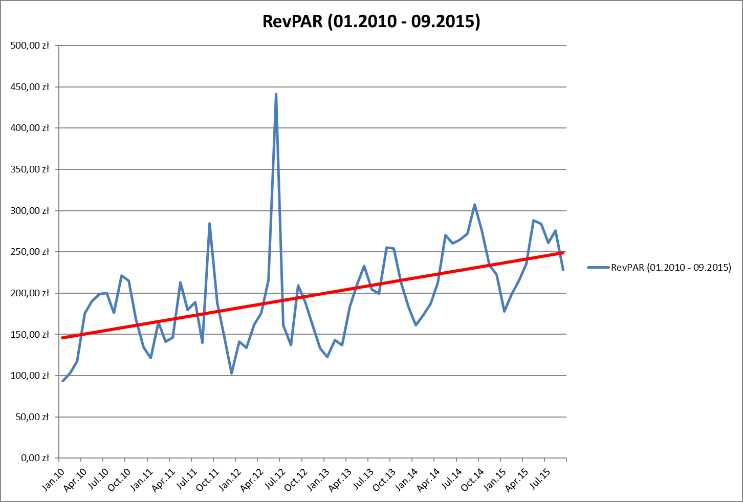
**Termin II** - 21-22 listopada 2019 r.

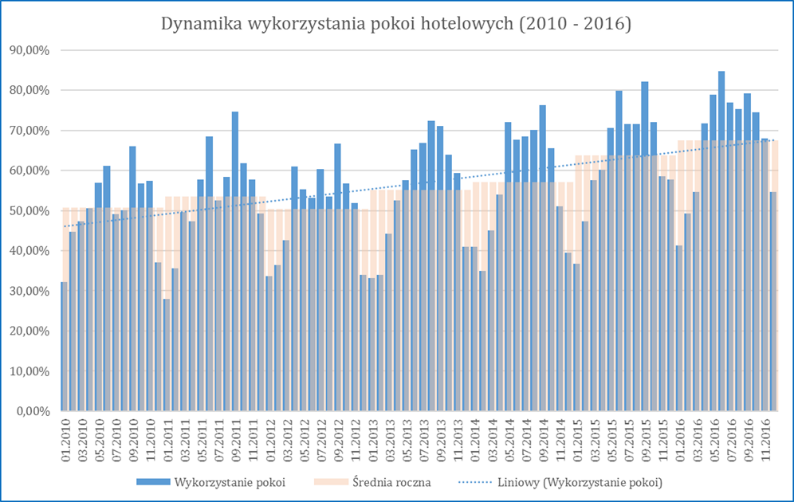
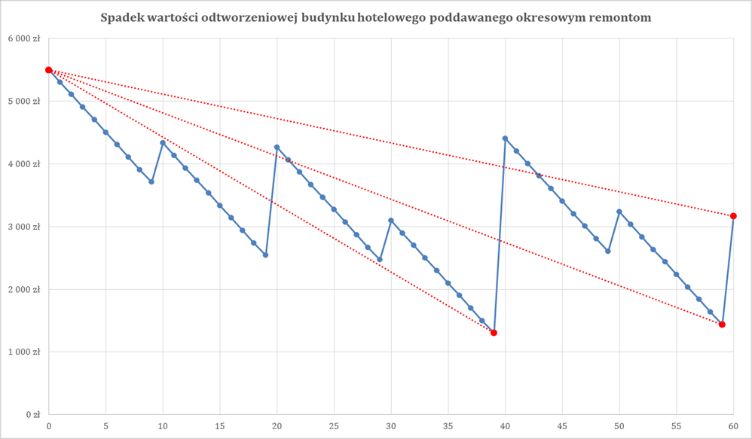
*Szanowni Państwo,*

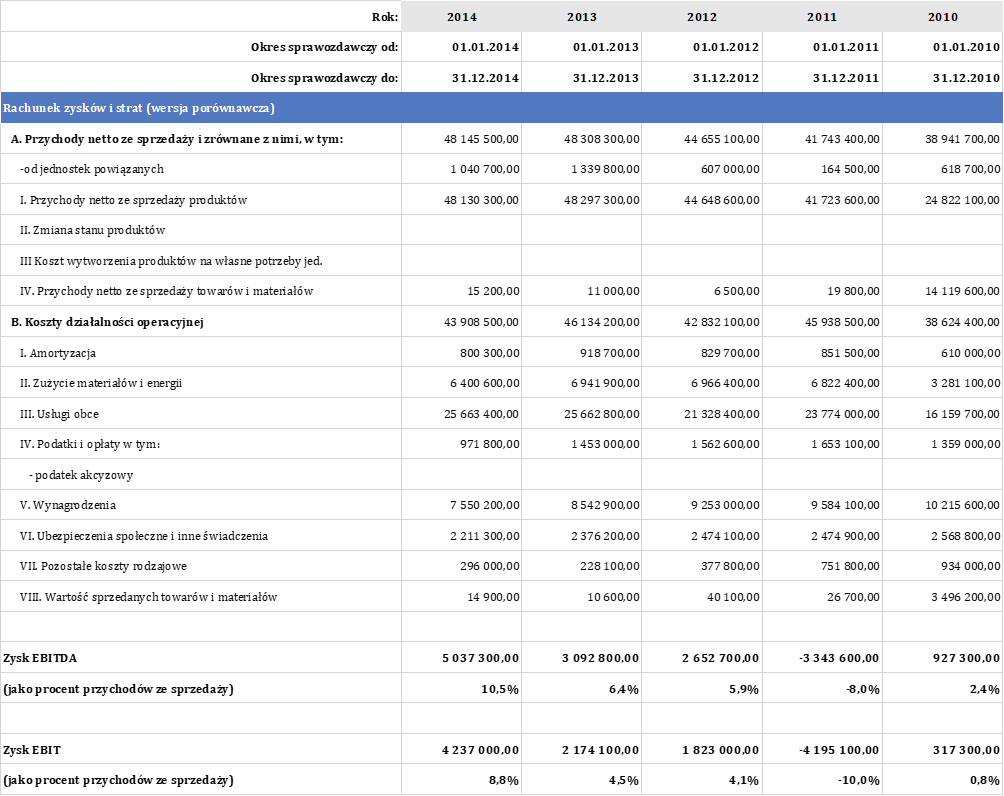
postępujący rozwój rynku nieruchomości, coraz częstsze postrzeganie nieruchomości jako zorganizowanego zespołu aktywów generujących przepływy pieniężne, wielkość rynku obrotu spółkami celowymi oraz wzrastające wymagania i oczekiwania stawiane rzeczoznawcom majątkowym powodują, że coraz bardziej istotne staje się rozumienie zasad wyceny nieruchomości operacyjnych, czyli takich nieruchomości, których wartość jest funkcją zyskowności określonej działalności operacyjnej.

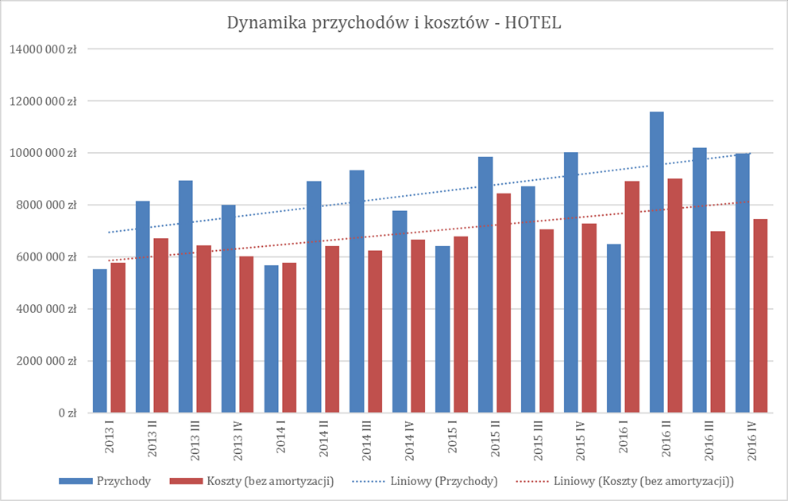
W związku z tym, wychodząc naprzeciw oczekiwaniom dużej części środowiska rzeczoznawców majątkowych, przygotowaliśmy dwudniowe **zajęcia warsztatowe z metody zysków**, na przykładzie wyceny nieruchomości hotelowej. W ramach zajęć słuchacze posiądą wiedzę praktyczną z zakresu:

* wykorzystywania metody zysków w wycenie nieruchomości operacyjnych,
* modelowania przepływów pieniężnych dla potrzeb wyceny nieruchomości,
* praktycznego wykorzystywania elementów analiz ilościowych (m.in. analiza korelacji i regresji),
* zależności pomiędzy metodami wyceny nieruchomości, a szacowaniem wartości spółki celowej,
* elementów analizy sprawozdań finansowych (bilans, rachunek zysków i strat) spółek celowych,
* elementów analizy przychodów i kosztów operacyjnych, z uwzględnieniem stopnia ich zmienności,
* wyznaczania nakładów na wydatki kapitałowe (CAPEX) oraz zmian w kapitale obrotowym netto,
* sposobów analizy rynku nieruchomości stanowiących bezpośrednią i pośrednią konkurencję,
* sposobów identyfikacji oraz metod analizy ilościowej czynników kreujących podaż i popyt,
* prognozowania poziomu przychodów i kosztów operacyjnych oraz zysku operacyjnego,
* określania okresu szczegółowej prognozy oraz sposobów kalkulacji wartości rezydualnej,
* sposobów ustalania rozliczeń pomiędzy właścicielem i użytkownikiem nieruchomości (operatorem),
* ustalania udziału nieruchomości w łącznej wartości aktywów operacyjnych,
* szacowania wartości rynkowej, wartości godziwej oraz wartości inwestycyjnej nieruchomości.



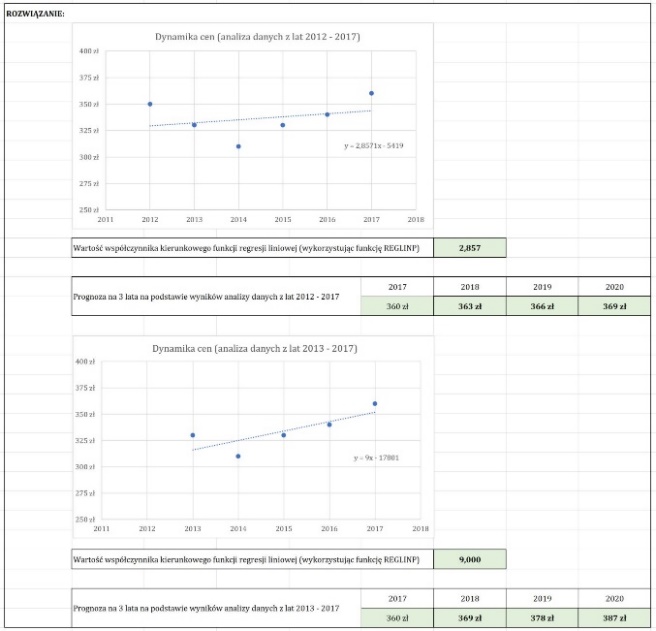


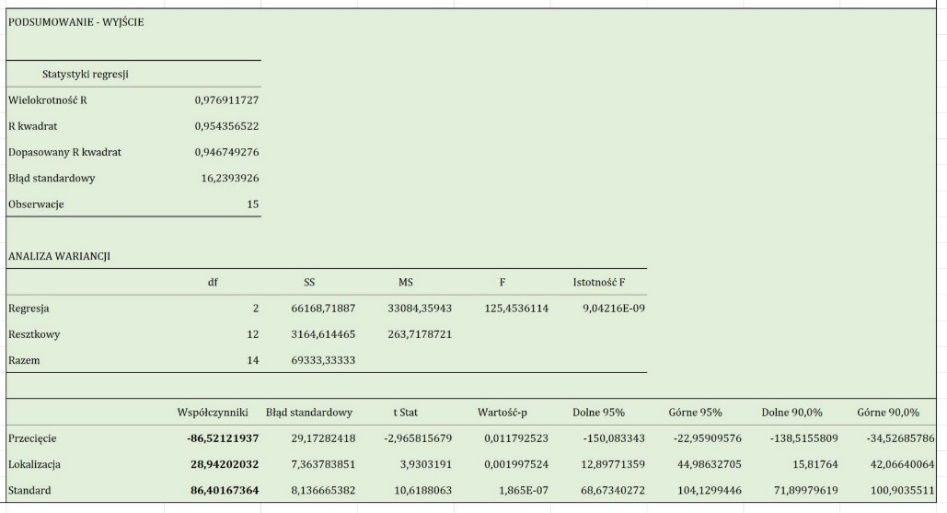




Czynnikiem warunkującym sukces zajęć *stricte* warsztatowych jest ograniczona liczba uczestników szkolenia oraz ich odpowiednie przygotowanie teoretyczne. Dlatego też niniejsze szkolenie skierowane jest do czynnie działających rzeczoznawców majątkowych, którzy w szczególności posiadają podstawową wiedzę teoretyczną i doświadczenie praktyczne w wycenie nieruchomości w podejściu dochodowym oraz posiadają podstawowe umiejętności w zakresie obsługi arkusza kalkulacyjnego Excel (podstawowe formuły i wbudowane funkcje). Ponieważ warsztaty będą prowadzone przy złożeniu, że słuchacze posiadają podstawową wiedzę z zakresu technik podejścia dochodowego, zachęcamy do zapoznania się z cyklem prezentacji multimedialnych, w tym w szczególności dotyczących zasady współmierności stóp i dochodów, modelowania dochodów z nieruchomości oraz stopy dyskontowej i stopy kapitalizacji (prezentacje dotyczące premii za ryzyko można pominąć). Link: <https://www.youtube.com/channel/UCwb7cZFUeZKDH-je4Uk89jA>

Dodatkowo można się zapoznać z częścią przykładów i zadań dydaktycznych (wraz z rozwiązaniami), które będą omawiane i rozwiązywane w trakcie zajęć. Pliki z zadaniami będą do pobrania na stronie: [www.iccs.pl](http://www.iccs.pl) w zakładce „Szkolenia” (do pobrania dla osób, które zapiszą się na zajęcia). Przykładowe arkusze z zadaniami:







Chcąc w jak największym stopniu przybliżyć praktykę wyceny tzw. nieruchomości operacyjnych, zajęcia będą miały charakter kameralnych warsztatów komputerowych. Zdecydowana większość czasu będzie poświęcona na wykonywaniu analiz i obliczeń w przygotowanych i przekazanych słuchaczom arkuszach kalkulacyjnych (dane wejściowe oraz formuły obliczeniowe). Dodatkowo zajęcia te będą miały charakter kameralny – liczba słuchaczy będzie wynosić od 20 (minimalna liczba uczestników) do maksymalnie 30 osób. Bloki tematyczne:

1. Wprowadzenie do przykładu, definicje podstawowych pojęć.
2. Wstępna analiza bilansu oraz wyników finansowych z działalności operacyjnej hotelu.
3. Analiza i weryfikacja przychodów oraz ich dekompozycja na wybrane źródła przychodów.
4. Analiza i weryfikacja kosztów oraz identyfikacja stałych i zmiennych kosztów operacyjnych.
5. Analiza sprawozdań finansowych (bilans, RZiS) porównywalnych spółek celowych (hotele).
6. Omówienie modelu DCF w wycenie nieruchomości hotelu, w tzw. pośredniej metodzie zysków.
7. Analiza konkurencji oraz prognozowanie czynników podaży i popytu na usługi noclegowe.
8. Prognozowanie przychodów, kosztów oraz zysków z działalności operacyjnej hotelu.
9. Szacowanie wartości rynkowej aktywów operacyjnych (w tym nieruchomości hotelu).

Dzień 1:

09:00 – 09:30 – sprawy organizacyjne

09:30 – 10:15 – blok tematyczny nr 1 (1 godz.)

10:15 – 11:45 – blok tematyczny nr 2 (2 godz.)

11:45 – 13:15 – blok tematyczny nr 3 (2 godz.)

13:15 – 14:00 – przerwa na lunch

14:00 – 15:30 – blok tematyczny nr 4 (2 godz.)

15:30 – 17:00 – blok tematyczny nr 5 (2 godz.)

Dzień 2:

09:00 – 09:45 – blok tematyczny nr 6 (1 godz.)

09:45 – 11:15 – blok tematyczny nr 7 (2 godz.)

11:15 – 12:45 – blok tematyczny nr 8 (2 godz.)

12:45 – 13:30 – przerwa na lunch

13:30 – 15:00 – blok tematyczny nr 9 (2 godz.)

15:00 – 15:30 – pytania i odpowiedzi, zakończenie zajęć

**Wykaz kompletu materiałów szkoleniowych, w części do pobrania ze strony** [**www.iccs.pl**](http://www.iccs.pl)**:**

Plik PDF „METODA ZYSKÓW - materiał informacyjny”; niniejszy plik zawierający wykaz wszystkich plików PDF i Excel związanych ze szkoleniem (uwaga: część plików dostępna jest wyłącznie dla zarejestrowanych uczestników szkolenia), wykaz czynności niezbędnych do przeprowadzenia przed szkoleniem, syntetyczny opis przebiegu szkolenia i przykładu obliczeniowego, opis procedury wyceny przy zastosowaniu bezpośredniej metody zysków i pośredniej metody zysków oraz wykaz najczęściej stosowanych oznaczeń i wybranych wzorów.

Plik PDF „Przykład operatu szacunkowego”, zawierający fragmenty analizy rynku i wyceny nieruchomości hotelu przy zastosowaniu metody zysków (plik dostępny wyłącznie dla zarejestrowanych uczestników szkolenia).

Pliki EXCEL z zadaniami obliczeniowymi (dla danych modelowych):

1. zadania – dane: plik zawierający treść zadań obliczeniowych oraz dane obliczeniowe
2. zadanie – rozwiązanie: plik zawierający fragmenty obliczeń oraz proponowane rozwiązania zadań
3. zadania – obliczenia: plik z arkuszami obliczeniowymi (plik będzie przekazany podczas zajęć)

Pliki EXCEL z danymi rynkowymi:

1. dane rynkowe – GUS: plik zawierający dany statystyczne dotyczące rynku usług hotelarskich
2. dane rynkowe – wyniki: plik zawierający sprawozdania finansowe (bilans, RZiS) spółek hotelarskich

Pliki EXCEL zawierające materiały dotyczące przykładu obliczeniowego (dane rzeczywiste):

1. przykład – dane: plik zawierający dane liczbowe dotyczące przykładu obliczeniowego
2. przykład – rozwiązanie: plik zawierający fragmenty obliczeń oraz proponowane rozwiązanie przykładu
3. przykład – obliczenia: plik z arkuszami obliczeniowymi (plik będzie przekazany podczas zajęć)



**CZYNNOŚCI POPRZEDZAJĄCE ZAJĘCIA WARSZTATOWE:**

**Przed zajęciami warsztatowymi należy:**

1. pobrać pliki ze strony [www.iccs.pl](http://www.iccs.pl) (jeżeli nie zostały udostępnione w ramach przesyłki mailowej),
2. sprawdzić, czy wszystkie pliki Excel otwierają się prawidłowo,
3. sprawdzić, czy program Excel zawiera narzędzia „Analiza danych” oraz „Solver” (uwaga poniżej).

**Uwaga:**

Wykonywanie niektórych obliczeń wymaga zainstalowania narzędzi Excel „Analiza danych” oraz „Solver”. Jeżeli te narzędzia są zainstalowane, to są one widoczne na pasku „Dane”, z reguły samym końcu paska:

Obraz zawierający urządzenie, pomiar

Opis wygenerowany automatycznie

Jeżeli te narzędzia nie zostały zainstalowane to należy tego dokonać. Przykładowo, w przypadku najnowszej wersji arkusza kalkulacyjnego Excel, należy kolejno wejść w zakładkę „Opcje”, następnie „Dodatki”, oraz dokonać wyboru „Analysis ToolPak” oraz „Dodatek Solver”.

![Obraz zawierający zrzut ekranu

Opis wygenerowany automatycznie](data:image/jpeg;base64,/9j/4AAQSkZJRgABAQEAwADAAAD/4RDcRXhpZgAATU0AKgAAAAgABAE7AAIAAAAGAAAISodpAAQAAAABAAAIUJydAAEAAAAMAAAQyOocAAcAAAgMAAAAPgAAAAAc6gAAAAgAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAHBpb3RyAAAFkAMAAgAAABQAABCekAQAAgAAABQAABCykpEAAgAAAAM3MQAAkpIAAgAAAAM3MQAA6hwABwAACAwAAAiSAAAAABzqAAAACAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA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**OPIS PRZEBIEGU SZKOLENIA ORAZ OPIS DANYCH DO PRZYKŁADU OBLICZENIOWEGO:**

Zajęcia warsztatowe poświęcone są metodzie zysków w wycenie tzw. nieruchomości operacyjnych, na przykładzie wyceny hotelu. Biorąc pod uwagę cel szkolenia, zajęcia prowadzone są „równolegle” dla dwóch rodzajów danych:

* dane modelowe (idealne) - pliki o wspólnej nazwie „zadania”,
* dane rzeczywiste (rynkowe) - pliki o wspólnej nazwie „przykład”,

co ma z jednej strony umożliwić zrozumienie procedury postępowania zarówno na etapie analizy rynku i prognozy popytu i podaży oraz przepływów pieniężnych z działalności operacyjnej, jak również interpretacji danych oraz podejmowania decyzji w przypadku obliczeń wykonywanych na rzeczywistych danych rynkowych.

Dodatkowo, biorąc pod uwagę ścisłe zależności pomiędzy metodą zysków stosowaną w wycenie nieruchomości, a dochodowymi metodami wyceny przedsiębiorstw (w tym w szczególności metodą dyskontowania przepływów pieniężnych FCFF), wycena nieruchomości hotelu jest przeprowadzana w dwóch wariantach:

* bezpośrednia metoda zysków - klasyczna metoda zysków stosowana w wycenie nieruchomości,
* pośrednia metoda zysków - wycena nieruchomości jako wynik wyceny aktywów spółki celowej.

**Syntetyczny opis nieruchomości hotelu, wycenianej w ramach przykładu obliczeniowego:**

Przedmiotem wyceny jest nieruchomość gruntowa zabudowana budynkiem hotelu. Budynek hotelu o standardzie 4-gwiazdkowym, położony jest w ścisłym centrum. W budynku znajduje się 60 pokoi hotelowych, restauracja, bar, sale konferencyjne oraz niewielkie zaplecze SPA.

Nieruchomość została zakupiona i wprowadzona do ewidencji środków trwałych w 2010 roku. W 2015 roku został wzięty kredyt na okres 15 lat (efektywne oprocentowanie 5,00%) w wysokości 10.000.000 zł, który został przeznaczony na remont budynku oraz wymianę wyposażenia i umeblowania. Sumaryczna wartość początkowa środków wynosi 20.000.000 zł. Jednocześnie ocenia się, że poziom nakładów CAPEX na odtwarzanie elementów wyposażenia i umeblowania wynosi 200.000 zł rocznie. Tabele amortyzacyjne środków trwałych są załączone w pliku „przykład – dane”.

Biorąc pod uwagę przeprowadzony w 2015 roku remont ocenia się, że miarodajnymi danymi do obliczeń są wyniki finansowe uzyskiwane z prowadzonej działalności operacyjnej w latach 2016 – 2018. W pliku „przykład – dane” zamieszczone są wszystkie dane finansowo-księgowe w ujęciu miesięcznym, kwartalnym i rocznym.

Dla potrzeb skonfrontowania wyników finansowych hotelu z danymi rynkowymi pozyskano dane GUS dotyczące rynku hotelarskiego oraz sprawozdania finansowe porównywalnych spółek celowych prowadzących analogiczną działalność operacyjną. Dane liczbowe zawarte są w plikach „dane rynkowe – GUS” oraz „dane rynkowe – wyniki”.

**SYNTETYCZNY OPIS BEZPOŚREDNIEJ METODY ZYSKÓW ORAZ POŚREDNIEJ METODY ZYSKÓW:**

**Procedura wyceny nieruchomości hotelu przy zastosowaniu bezpośredniej metody zysków:**

**Krok 1:**

Analiza ilościowa wyników finansowych hotelu, w tym w m.in. ustalenie struktury przychodów oraz kosztów i wydatków operacyjnych, stopnia zmienności wybranych kosztów operacyjnych, określenie zależności pomiędzy poziomem przychodów i kosztów oraz przeprowadzenie analizy dynamiki wybranych zmiennych.

**Krok 2:**

Analiza danych dotyczących popytu i podaży oraz analiza rynku konkurencyjnych hoteli, w tym m.in. ustalenie rzeczywistego oraz potencjalnego udziału wycenianego hotelu na lokalnym rynku (uwzględniając bezpośrednią konkurencję). Analiza i weryfikacja danych źródłowych dotyczących stopnia wykorzystania pokoi hotelowych oraz miejsc noclegowych.

**Krok 3:**

Dokonanie analizy dynamiki wybranych czynników kreujących podaż i popyt wraz z prognozą ich wartości w kolejnych 3 – 5 latach (okres szczegółowej prognozy). Oszacowanie stopnia wykorzystania pokoi hotelowych oraz miejsc noclegowych w kolejnych latach szczegółowej prognozy.

**Krok 4:**

Obliczenie przychodów z działalności operacyjnej w kolejnych latach, uwzględniając wyniki prognozy stopnia wykorzystania pokoi hotelowych i miejsc noclegowych, jak również strukturę i wzajemne zależności pomiędzy wybranymi źródłami przychodów operacyjnych.

**Krok 5:**

Obliczenie kosztów operacyjnych w kolejnych latach prognozy, stałych i zmiennych wydatków operacyjnych obciążających dochód efektywny brutto oraz oszacowanie poziomu niezbędnych nakładów kapitałowych na wyposażenie i umeblowanie hotelu.

**Krok 6:**

Określenie poziomu dochodów operacyjnych netto w kolejnych latach szczegółowej prognozy, wyznaczenie wartości rezydualnej po okresie szczegółowej prognozy oraz oszacowanie wartości rynkowej ogółu tzw. aktywów operacyjnych, poprzez zdyskontowanie dochodów operacyjnych netto oraz wartości rezydualnej.

**Krok 7:**

Określenie wartości rynkowej nieruchomości, biorąc pod uwagę jej ułamkowy udział w łącznej wartości ogółu aktywów operacyjnych (aktywów niezbędnych do prowadzenia działalności operacyjnej hotelu).

**Procedura wyceny nieruchomości hotelu przy zastosowaniu pośredniej metody zysków:**

Pośrednia metoda zysków polega głównie na tym, iż w pierwszym etapie dokonuje się oszacowania wartości aktywów tzw. spółki celowej (istniejącej lub hipotetycznej) prowadzącej działalność hotelową. Na tym etapie stosuje się klasyczne metody dochodowe stosowane przy wycenie spółek. Biorąc pod uwagę, że celem wyceny jest oszacowanie wartości rynkowej (lub wartości godziwej), z reguły stosowany jest model dyskontowania wolnych przepływów pieniężnych FCFF (*Free Cash Flow to Firm*), a do szacowania ich wartości bieżącej stosuje się stopę dyskontową WACC (*Weighted Average Cost of Capital*). Dopiero w drugim etapie, znając łączną wartość rynkową wszystkich aktywów, ustala się udział nieruchomości w tej łącznej wartości rynkowej.

|  |  |  |
| --- | --- | --- |
|  | **Jest spółka celowa** | **Brak spółki celowej** |
| **Krok 1** | Analiza bilansu, RZiS wraz z ich odpowiednią korektą i przekształceniem polegającym na „usunięciu” aktywów nieoperacyjnych oraz na związanej z tym korekcie strony pasywnej bilansu. | Stworzenie hipotetycznej spółki celowej, dla której składnikami aktywów są wyłącznie aktywa operacyjne związane z działalnością hotelu, zaś struktura pasywów odzwierciedla typowe zależności rynkowe. |
| **Krok 2** | Analiza zestawienie sald i obrotów, m. in. pod kątem identyfikacji źródeł przychodów oraz rodzaju kosztów i wydatków operacyjnych | Nie dotyczy. |
| **Krok 3** | Analiza zestawienia środków trwałych wraz z weryfikacją pod kątem działalności hotelu. Ustaleniem poziomu amortyzacji i poziomu niezbędnych nakładów kapitałowych | Stworzenie zestawienia środków trwałych związanych wyłącznie z działalnością hotelu. Ustaleniem poziomu amortyzacji i poziomu niezbędnych nakładów kapitałowych |
| **Krok 4** | Analizy i prognozy, prowadzące do ustalenia poziomu przychodów oraz kosztów i wydatków operacyjnych w kolejnych latach prognozy – merytorycznie są to czynności takie same, jak w pośredniej metodzie zysków (kroki 1 – 5). | |
| **Krok 5** | Stworzenie prognozy sprawozdań finansowych na kolejne lata prognozy, tzn. bilans, RZiS, sprawozdanie z przepływu środków pieniężnych, wraz z ustaleniem poziom spodziewanych wolnych przepływów pieniężnych typu FCFF (*Free Cash Flow to Firm*) | |
| **Krok 6** | Wyznaczenie stopy dyskontowej WACC oraz stopy kapitalizacji wartości rezydualnej. | |
| **Krok 7** | Oszacowanie wartości rynkowej wszystkich aktywów operacyjnych oraz ustalenie udziału nieruchomości w łącznej wartości rynkowej / godziwej wszystkich aktywów operacyjnych. | |

**WYBRANE OZNACZENIA I WZORY STOSOWANE W WYCENIE NIERUCHOMOŚCI I PRZEDSIĘBIORSTW:**

Poniżej dokonano alfabetycznego zestawienia wybranych skrótów oraz oznaczeń stosowanych w raportach z wyceny nieruchomości komercyjnych oraz w raportach z wyceny przedsiębiorstw i spółek celowych.

A - aktywa (*Assets*), często z wyłączeniem aktywów finansowanych zobowiązaniami handlowymi

ADR - średnia cena / stawka za pokój (*Average Daily Rate*)

Amort. - odpisy amortyzacyjne (*Amortization*)

CAPEX - nakłady kapitałowe (*Capital Expenditures*)

CAPM - model wyceny aktywów kapitałowych (*Capital Asset Pricing Model*)

D - dług (*Debt*), często tzw. oprocentowany dług czyli z pominięciem zobowiązań handlowych

DCR - wskaźnik pokrycia długu (*Debt Coverage Ratio*)

E - kapitał własny (*Equity*), w zależności od kontekstu może chodzić o wartość księgową

lub o wartość rynkową kapitału własnego

EAT - zysk netto (*Earning After Tax*)

EBIT - zysk operacyjny przed odsetkami oraz podatkiem dochodowym

(*Earnings Before Interest and Taxes*)

EBITDA - zysk operacyjny przed odsetkami, podatkiem dochodowym oraz przed amortyzacją

(*Earnings Before Interest Taxes, Amortization and Depreciations*)

EBT - zysk brutto (*Earning Before Tax*)

EGI - dochód efektywny brutto (*Effecftive Gross Income*)

FCFE - wolny przepływ pieniężny do kapitału własnego (*Free Cash Flow to Equity*)

FCFF - wolny przepływ pieniężny do firmy (*Free Cash Flow to Firm*)

FF&E - wyposażenie i umeblowanie nieruchomości (*Furniture, Fixtures & Equipment*)

g - dynamika dyskontowanych przepływów pieniężnych, wyrażona w ujęciu procentowym,

(przy założeniu postępu geometrycznego)

IRR - wewnętrzna stopa zwrotu (*Internal Rate of Return*)

LTV - stosunek kredytu do wartości nieruchomości (*Loan to Value Ratio*)

LTC - stosunek kredytu do kosztów inwestycji (*Loan to Cost Ratio*)

MV - wartość rynkowa (*Market Value*)

MRP - premia za ryzyko rynkowe (*Market Risk Premium*)

NCF - przepływ pieniężny netto (*Net Cash Flow*)

NOI - dochód operacyjny netto (*Net Operating Income*)

NOPAT - zysk operacyjny po podatku dochodowym (*Net Operating Profit After Tax*)

NPV - wartość bieżąca netto (*Net Present Value*)

Occup. - wskaźnik wynajętej powierzchni lub pokoi hotelowych (*Occupancy Rate*)

OER - wskaźnik wydatków operacyjnych (*Operating Expense Ratio*)

OPEX - wydatki operacyjne (*Operating Expenses*)

PGI - dochód potencjalny brutto (*Potential Gross Income*)

PMT - płatność okresowa (*Payment*)

PV - wartość bieżąca (*Present Value*)

R - stopa kapitalizacji (*Capitalization Rate*)

RevPAR - przychód na dostępny pokój (*Revenue per Available Room*)

RH - historyczna stopa kapitalizacji (*Historical Capitalization Rate*)

RPRIME - stopa kapitalizacji dla najlepszych nieruchomości danego rodzaju (*Prime Yield*)

RT - terminowa stopa kapitalizacji (*Terminal Capitalization Rate*)

r - stopa dyskontowa (*Discount Rate of Return*), wymagana stopa zwrotu (*Required Rate of Return*)

(subskrypt E oraz D oznaczają odpowiednio kapitał własny oraz oprocentowany dług)

RFR - stopa wolna od ryzyka (*Risk Free Rate*)

ROA - wskaźnik rentowności aktywów (*Return on Asset*)

ROE - wskaźnik rentowności kapitałów własnych (*Return on Equity*)

RV - wartość rezydualna (*Residual Value*)

Tax CIT - krańcowa stopa podatku dochodowego CIT od osób prawnych

YTM - stopa dochodu w terminie do wykupu (*Yield to Maturity*)

WACC - średni ważony koszt kapitału (*Weighted Average Cost of Capital*)

WC - kapitał obrotowy netto (*Working Capital*)

Ogólny wzór na wartość bieżącą przepływów pieniężnych netto z inwestycji:

gdzie:

Wzór na wartość bieżącą aktywów operacyjnych spółki finansowanych kapitałem własnym i oprocentowanym długiem, określaną poprzez dyskontowanie wolnych przepływów pieniężnych do firmy FCFF przy użyciu stopy dyskontowej WACC:

gdzie:

Uproszczony wzór na przepływ pieniężny FCFF:

Uproszczony wzór na stopę dyskontową WACC:

Uproszczony wzór na wymaganą stopę zwrotu z kapitałów własnych przy użyciu modelu CAPM:

gdzie βL to tzw. lewarowany współczynnik beta, właściwy dla danej branży.

**INFORMACJE O OSOBIE PROWADZĄCEJ SZKOLENIE: Piotr Cegielski, PhD, MSc, MBA, MAI, MRICS**

**Tytuły i stopnie zawodowe i naukowe:**

• doktor nauk ekonomicznych, dyscyplina: Finanse

(Uniwersytet Ekonomiczny we Wrocławiu);

• magister inżynier budownictwa (Politechnika Wrocławska);

• magister zarządzania MBA (Akademia Ekonomiczna we Wrocławiu);

• magister nauk w specjalności „Wycena i zarządzanie nieruchomościami”

(Sheffield Hallam University).

**Wybrane studia podyplomowe:**

• Studia podyplomowe „Rachunkowość” (Wyższa Szkoła Bankowa we Wrocławiu);

• Studia podyplomowe „Analityk Finansowy” (Uniwersytet Ekonomiczny we Wrocławiu).

**Uprawnienia i licencje państwowe:**

* uprawnienia doradcy inwestycyjnego (licencja wydana przez Komisję Nadzoru Finansowego)
* uprawnienia rzeczoznawcy majątkowego (nadane przez Ministra Gospodarki Przestrzennej i Budownictwa)
* uprawnienia członka rad nadzorczych spółek Skarbu Państwa (nadane przez Ministra Przekształceń Własnościowych)

**Biegły sądowy przy Sądzie Okręgowym w Warszawie** w zakresie wyceny przedsiębiorstw, spółek, akcji i udziałów oraz aktywów rzeczowych, finansowych, niematerialnych i prawnych.

Członkostwo w następujących organizacjach zawodowych:

• członek założyciel Stowarzyszenia Biegłych Wyceny Przedsiębiorstw w Polsce;

• członek Związku Maklerów i Doradców;

• członek Stowarzyszenia Rzeczoznawców Majątkowych we Wrocławiu;

• członek Appraisal Institute (Chicago, USA);

• członek Royal Institution of Chartered Surveyors (United Kingdom);

• członek CCIM Institute (Chicago, USA).

Jedyny polski rzeczoznawca majątkowy posiadający amerykański certyfikat specjalisty w zakresie wyceny nieruchomości komercyjnych i mieszkaniowych:

• The Appraisal Institute: MAI - Master of Appraisal Institute

Ponadto posiadający certyfikaty oraz licencje specjalisty w zakresie szacowania wartości nadane przez:

• Royal Institution of Chartered Surveyors: RICS Registered Valuer

• Royal Institution of Chartered Surveyors: CVS - Chartered Valuation Surveyor

• The European Group of Valuers’ Associations: REV - Recognized European Valuer