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Strategic Directions and Development Prospects of the Construction Industry in Russia

The construction sector is an integral core of Russia's economic development, playing a key role in infrastructure development and meeting the housing needs of the population. Analyzing the current state of this sector is of particular importance in the context of the changing economic environment and the country's strategic goals. Despite various challenges and vicissitudes, the Russian construction industry continues to demonstrate resilience and potential for further development. This paper provides an analysis of the current state and prospects of the construction industry in the Russian Federation. The authors assess the key aspects of the sector, its significance for the national economy, market dynamics, investment trends, and technological innovations. The analysis of current statistical data conducted by the authors allows identifying the main challenges and opportunities facing the construction industry, as well as considering possible strategies for achieving sustainable development of the industry in the future. Special attention is paid to the analysis of national projects and programmes for state support of regions, stimulating investment in construction and infrastructure modernization.

Keywords: construction industry, housing and utilities sector, state policy, urban development potential, comprehensive development of territories, development prospects, national economy

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The construction industry and the housing and utilities sector are among the most significant sectors of the national economy, largely determining the development dynamics of the Russian Federation. The construction industry provides employment, income for millions of citizens, and directly contributes to creating comfortable living conditions for people.

The implementation of the state policy of the Russian Federation in the fields of housing construction

and housing and utilities sector for the long term is carried out in accordance with the national goals defined by the Decree of the President of the Russian Federation dated July 21, 2020, No. 474 "National Goals of the Development of the Russian Federation for the Period up to 2030".

Based on the analysis of the retrospective development of the construction industry, the following key events, which have determined the strategy for further development, can be identified (Fig. 1).

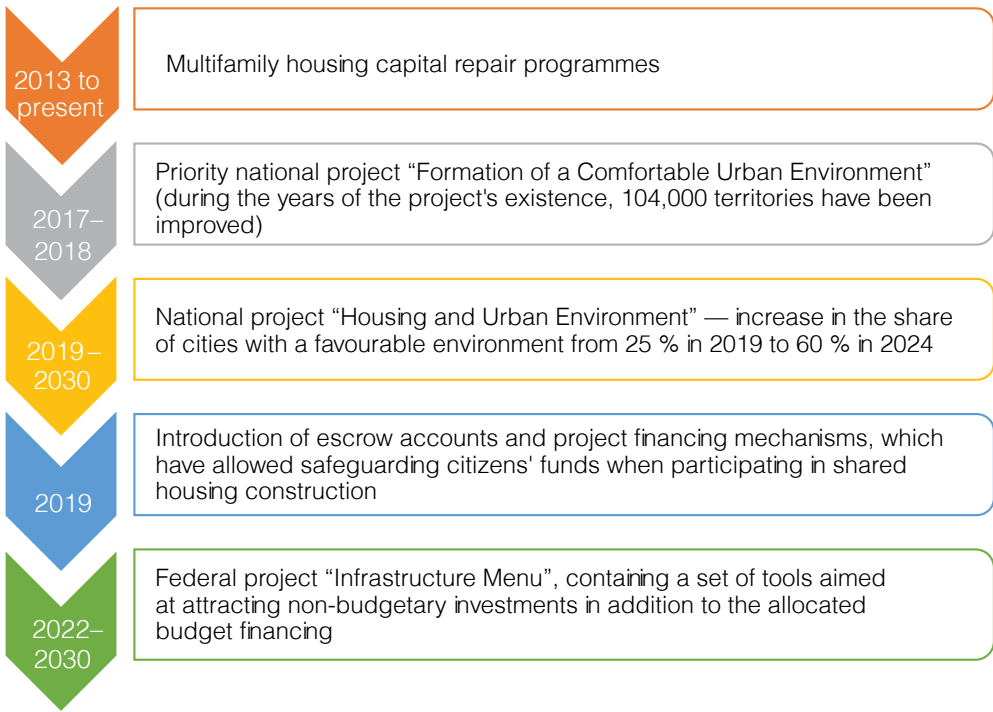


Fig. 1. Key events that determined the strategy for the development of the construction industry in the Russian Federation¹

¹ Official website of the Ministry of Construction and Housing and Communal Services of the Russian Federation. URL: <http://www.minstroyrf.ru/> (accessed: 14.04.2024). (rus.).



Fig. 2. Resettlement of emergency housing stock in various regions of the Russian Federation

During the past period, the Russian construction industry and housing and utilities sector have achieved significant results in their development. Additionally, within the framework of the Russian Government's initiative "Infrastructure Menu", new tools to support infrastructure construction in the regions have been created. This programme aims to strengthen infrastructure and improve the quality of life for citizens [1]. A continuously operating mechanism for resettling emergency housing has also been launched, contributing to the safety and improvement of housing conditions for the population.

In collaboration with deputies, senators, regions, and representatives of the expert community, the development strategy for the construction industry and housing and utilities sector until 2030, with a forecast until 2035, has been prepared by the relevant government agencies. This balanced document takes into account regional specificities in its implementation and is aimed at ensuring the sustainable development of the industry in the long term.

Over the past 10 years, more than 840 million square metres of housing have been put into operation in Russia, including 442.6 million square metres in multifamily buildings and 401.3 million square



Fig. 3. Dynamics of emergency housing stock in the Russian Federation (according to Rosstat) [5]

metres in individual residential buildings. Since 2014, over 22 million Russian families have improved their housing conditions [2].

Another important achievement has been the resettlement of 1,385,000 people from the emergency housing stock (Fig. 2).

Since 2014, capital repairs have been carried out in 283 thousand multi-apartment buildings in Russia, with a total area of 1 billion square metres, housing more than 38.5 million people (Fig. 3, 4) [3].

To maintain the pace of housing construction, it is important to continue to increase the urban development potential and create construction sites in all regions of the country. In 2023, it amounted to 420 million square metres. In order to expand it, at the end of 2020, the mechanism of Comprehensive Territorial Development was launched, aimed at bringing unused or inefficiently used territories, as well as territories of emergency and dilapidated housing stock, into circulation [6, 7].

To improve the quality of life for citizens and create a comfortable environment for public activities, more than 111 thousand public and courtyard areas have been improved over the past period (Fig. 5) [8].

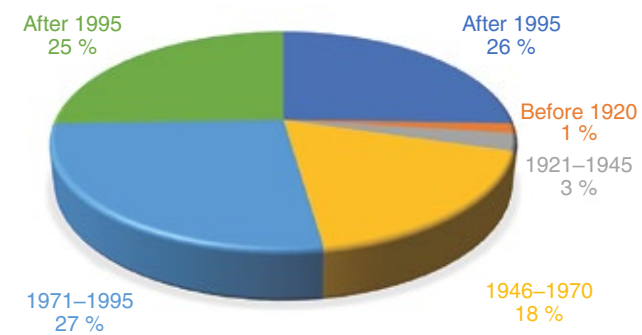


Fig. 4. Distribution of housing stock in the Russian Federation by year of construction, thousand sq. m (according to Rosstat) [5]



Fig. 5. Formation of a comfortable urban environment (improvement of the “Embankment of Lights” area, Verkhny Tagil city, Sverdlovsk region)

An important aspect of improving the mechanisms of organizing the construction process is the targeted reduction of the investment and construction cycle without compromising the safety of objects:

- the list of mandatory requirements of standards and regulations has been reduced from 11,000 to 380;
- the number of information, documents, materials, and approvals required for project implementation has been reduced from 989 to 696.

On average, this allows reducing the time from the idea of construction to commissioning by 336 days (from 1,831 to 1,495 days). By 2030, the exhaustive list is planned to be reduced to 350 items [9].

The industry's priority is a comprehensive approach to the organization and implementation of construction projects aimed at ensuring that housing construction is accompanied by the quantitative and qualitative development of residential quarters with necessary infrastructure. Work continues on the implementation of projects involving the construction and modernization of housing and utilities infrastructure objects [10]. New tools to support infrastructure construction in the regions have been created, which are now part of the government initiative “Infrastructure Menu”, within which the construction and modernization of more than 2,000 utility facilities are planned.

An important component of improving people's quality of life in modern conditions is the construction of new housing, including high-energy-efficiency multifamily buildings, and the use of green building technologies [11].

Issues related to the destruction of the architectural appearance of established development in historical city centers, the increase in the number of dilapidated and emergency buildings, the wear and tear of engineering and social infrastructure objects, the maintenance, repair, and reconstruction of multi-apartment buildings, which are cultural heritage sites, remain relevant.

There is also a need to address issues related to improving the quality of housing and utilities services, energy efficiency, and energy conservation in the housing and utilities sector, timely

renewal of the housing stock, and its provision with necessary infrastructure, as well as improving the management system of multi-apartment buildings.

To preserve and develop positive trends and to address the challenges facing the construction industry and housing and utilities sector, the following directions and specific aspects of industry policy are being implemented [12]:

1. Formation of a national project aimed at achieving the national goal “Comfortable and Safe Living Environment” by 2030, including the following directions:

- accelerated modernization of communal infrastructure systems, including construction and reconstruction of water supply, sewage, and heating systems;
- stimulating the development of housing construction in the Russian regions, including the construction of social, engineering, and transportation infrastructure;
- creating a comfortable urban environment, including identifying additional sources of funding for improvement of courtyard areas of apartment buildings and improvement of rural settlements;
- ensuring sustainable reduction of substandard housing stock, including resettlement of citizens from apartment buildings recognized as emergency after January 1, 2022.

2. Extension of the duration of the mechanisms of the federal project “Infrastructure Menu”.

3. Formation and implementation of preferential mortgage programmes for the construction (purchase) of individual residential houses, including the use of ready-made standardized house kits of factory production.

4. Formation of a database of verified data used to assess the technical condition of communal infrastructure objects.

5. Development of a long-term programme for preserving cultural heritage sites (historical and cultural monuments) of the peoples of the Russian Federation, including residential buildings of historical and architectural value.

6. Establishment of criteria for selecting and evaluating the efficiency of investment projects within the framework of the federal

- project "Infrastructure Menu" in connection with territorial planning documents.
- 7. Development and implementation of unified standards for the management of multi-apartment buildings.
 - 8. Formation of a registry of best regional practices in construction and operation of buildings with minimal environmental impact, including measures to reduce energy and material resource consumption throughout the entire life cycle of a capital construction object.
 - 9. Ensuring, in accordance with urban planning standards, comprehensive development of social infrastructure in the implementation of housing construction projects, financed, in part, through interbudgetary transfers from the federal budget.
 - 10. Improvement of the quality of development and updating of heat supply schemes of municipal entities to make the most effective and justified decisions on the development of heat supply systems.
 - 11. Organizing systematic work on prevention and prompt elimination of the consequences of accidents at housing and utilities sector facilities and in the housing stock operation sphere, ensuring the connection of the necessary data suppliers to the federal monitoring and control system for the elimination of accidents and incidents at housing and utilities sector facilities, and timely provision of required information to this federal system.
 - 12. Ensuring the possibility of using ready-made standardized house kits of factory production based on a wooden frame, solid wood panels, and/or glued structures for the construction of

residential houses within the framework of the implementation of regional targeted programs for resettlement of citizens from emergency housing stock.

13. Development of a mechanism for comprehensive territorial development as a tool for renewing territories with dilapidated and emergency housing stock, creating necessary conditions for the development of transportation, social, and engineering infrastructure.

The development of the construction industry in Russia is aimed at achieving a qualitatively new level of comfort and well-being for citizens [13]. Digitization, strengthening of personnel potential, comprehensive development of infrastructure and housing and utilities sector, as well as ensuring timely commissioning of social facilities and integration of new regions, are key factors determining the success of construction activities in the future (Fig. 6).

Given the dynamic and complex challenges facing the industry, it is necessary to continue actively implementing innovations and modern technologies, as well as constantly improving the personnel potential. Only this way can we ensure sustainable and effective development of the sector, contributing to the improvement of the population's living standards and ensuring the socio-economic growth of the country as a whole [14].

The adoption of comprehensive measures and the implementation of strategic programmes for the development of the construction industry will create favourable conditions for overcoming existing challenges and achieving sustainable development in the long term.

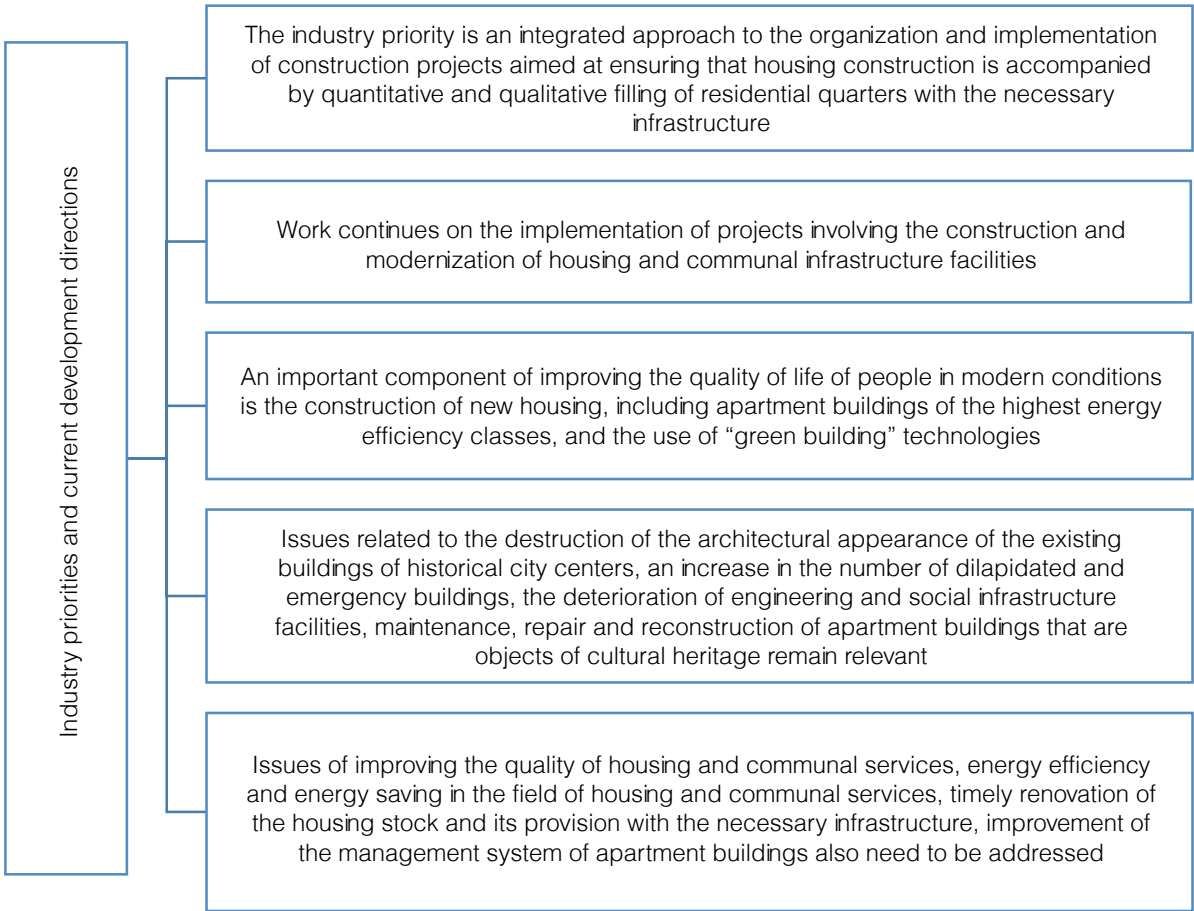


Fig. 6. Industry priorities and current development directions

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Стратегические направления и перспективы развития строительного комплекса в России

Строительный комплекс является неотъемлемым стержнем экономического развития потенциала России, играя ключевую роль в формировании инфраструктуры и обеспечении жилищных потребностей населения. Анализ текущего состояния этого сектора обретает особую важность в контексте изменяющейся экономической среды и стратегических целей страны. Несмотря на разнообразные вызовы и перипетии, российская строительная отрасль продолжает демонстрировать устойчивость и потенциал дальнейшего развития. В статье проведен анализ текущего состояния и перспектив развития строительной отрасли Российской Федерации. Авторы оценивают ключевые аспекты сектора, его значение для национальной экономики страны, динамику рынка, тенденции инвестирования и технологические инновации. Проведенный авторами анализ актуальных статистических данных позволяет выявить основные вызовы и возможности, с которыми сталкивается строительная отрасль, а также рассмотреть возможные стратегии для достижения устойчивого развития отрасли в будущем. Особое внимание уделяется анализу национальных проектов и программ государственной поддержки регионов, стимулирующих инвестиции в строительство и модернизацию инфраструктуры.

Ключевые слова: строительный комплекс, жилищно-коммунальное хозяйство, государственная политика, градостроительный потенциал, комплексное развитие территорий, перспективы развития, национальная экономика

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