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Shopping centres under the integrated development of territories concept

The paper discusses non-commercial issues of shopping centres development, its role for creating comfortable environment according to the Integrated development of territories (IDT). The IDT concept suggests creating comfortable living areas with smart planning of social, public and business places. The main role in creating comfortable urban environment play attraction centres — apparently, Neighborhood and Community centres can perform such a function for both new and developed areas. Statistical data presented in the paper confirms popularity of Community shopping centres construction in new residential areas in various cities of Russia. The author points out the new elements, which carry out social function, attract visitors, meet the demand of the inhabitants of the neighborhood. Recommendations of the IDT Standard for shopping facilities, regarding the low-rise, middle-rise and central models have been pointed out for the new areas of construction. New outside elements are suggested to be included by developers at the concept and new district planning stage, regarding parking and landscaping. As an example of the existing residential areas development a project in Moscow is studied. A development company transforms movie-theaters of the soviet period into Community Centres and focuses on a close interaction with local community and loyalty program. Based on the optimal tenants mix their concept allows to increase the shopping centre attendance, events and discounts also stimulate new visits. The article allows to estimate how much IDT concept converges business and society interests and describes instruments and factors which affect.

Keywords: *Standard for integrated development of territories, comfortable urban environment, new elements of neighborhood shopping centres, walking distance, attendance, public places, social function of shopping centre, central model, community shopping center*



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Commercial estate in Russia has transformed gradually from clothing markets to modern shopping malls. At each stage of its development shopping real estate reflected the current demand tendencies [1]. In 2020 the Federal Law No. 494 "Amendments to City Plan Code of the Russian Federation and some legislative acts in order to provide integrated development of territories" [2] was passed and later some other amendments for better functioning of IDT mechanisms. The changes logically confirmed the vector towards auxiliary needs of visitors, which has been shaping during the past years. According to article 64 p. 1 of the City Plan Code of RF 5 main goals of IDT include: providing proper conditions for development of transport, social and engineering infrastructure, settlements territories' amenity and landscaping, better access to such infrastructure, efficient use of settlements' territories, also for creating comfortable city environment, service and employment points. Achieving those goals is impossible without, first of all, neighborhood and convenience shopping centres [3] with thoroughly considered concept [4].

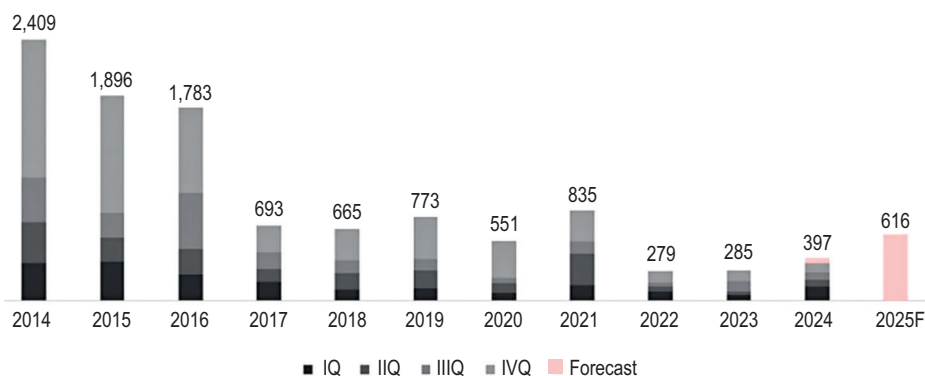
The Standard for integrated development of territories was worked out by the Construction Ministry (Minstroy), DOM.RF and CB Strelka (Construction Bureau), the Standard was initiated in the Government Chairman for IDT adaptation [5]. The recommended percent of social and business infrastructure for low-rise, mid-rise and high-rise residential development is correspondingly 10–20, 20–30 и 30 % and more [6]. The standard implies division into coverage sub-areas in case of a large territory of residential complex, as the standard model is for land plots of 14ha, which is the most comfortable for walking accessibility. Social and business area

consists of street-retail and single-standing buildings of a specialized purpose. The standard recommends [7]: "In the case of low functional variety of the territory it is recommended to include a magnet-unit (a leisure centre, for example, which attracts visitors from other city districts and creates additional traffic for other elements of shopping, services and leisure infrastructure". Thus, it is the **neighborhood shopping** centres that can enrich and improve residential complex's infrastructure, as it is the place where interest of retail and customers meet: large indoor spaces allow to form the most convenient tenant mix (shops, services, entertainment) at one place and create a favourable leisure atmosphere [8].

By the end of 2024 (Fig. 1) 397,000 sq. m of shopping centres have been built. The main share is presented by regions — 68 %, including 13 % Moscow region. Moscow share is 32 % [9].

During the first 3 months of 2025 five malls have been opened in Moscow: BOTANICA, a part of transporting connection point at st. Botanicheskaya (GLA: 28.5 thous. sq. m), meeting point VITYAZJ from ADG Group (GLA: 11.0 thous. sq. m), AFI GALLERY (GLA: 8.1 thous. sq. m), ZYORNISHKO/CORN (GLA: 6.4 thous. sq. m), ZILART universal store (GLA: 16.7 thous. sq. m). Total GLA of the malls appeared January-March 2025 is 69 thous. sq. m (+102 % y/y). Till the end of 2025 about more than 20 malls are expected, which, provided on-time commissioning, can even lead to record-breaking figures for the period of 2017–2025.

There was no opening of shopping centres in 2023–2024 in St. Petersburg, whereas in the 1st quarter of 2025 a gradual opening of Park Mall (GLA: 30 thous. sq. m) at London Park has started.



Source: IBC Real Estate

Fig. 1. Volume of construction of new shopping centres 2014–2025, thous. sq. m

Also 5 more malls have been announced to be open in 2025: HOLLYWOOD (GLA: 60 thous. sq. m), SKY (GLA: 25.7 thous. sq. m), second phase of Eco Park Murino (GBA: 12 thous. sq. m) and two projects from Kronung Group — at Novogorelovo (GLA: 11.8 thous. sq. m) and at the residential complex Sun City (GLA: 3.8 thous. sq. m). Total amount of the expected malls is 136.6 thous. sq. m.

January–March 2025 nine malls opened in regions of Russia, with total square almost 80 thous. sq. m: Grand City Kemerovo (GLA: 30.0 thous. sq. m), DEPO in Voronezh (GLA: 12.5 thous. sq. m), Esfera Centre in Nalchik (GLA: 12.0 thous. sq. m), Moskovskii in Velikii Novgorod (GLA: 6.9 thous. sq. m), Soldatov in Perm (GLA: 6.5 thous. sq. m), Melnitsa in Tula (GLA: 5.0 thous. sq. m), Ilij in Ilijinskoye (GLA: 3.3 thous. sq. m), Arsenal in Perm (GLA: 2.5 thous. sq. m) Danish Quarter in Mitishchi (GLA: 1.3 thous. sq. m).

Till the end of this year 200 thous. sq. m of malls is expected, which is 9 % less than in 2024. Regional market shows the tendency for smaller average square of shopping centres: in 2000–2014 it was 30.8 thous. sq. m, in 2015–2025 it reduced by 25 % — till 23.2 thous. sq. m.

Construction of qualitative shopping centres continues in Russia, comprising mostly neighborhood ones. GLA of 75 % shopping centres built since the beginning of 2024 is about 15,000 sq. m. The trend for neighborhood shopping centres is a result of decentralized development of city areas. Since cities grow via new residential areas, the demand for better infrastructure and shops with walking distance grows as well. Retail has to transform to remain up to date and attractive. The transforming buyer's behaviour defines development vector of retail market, stimulating participant to catch up. As shopping centres have to adopt to the increasing segment e-commerce [10] new formats and attraction points prove to be extremely useful.

Since 2000's food court, entertainment and kids' zones [11] became essential part of shopping malls. During the last 5 years new social and business tenant appeared, such as "My documents", MOEK and other organizations. Rates are very low for such tenants, but they attract huge traffic (rate issues are not a subject to this paper).

Social function also continues to develop and progress. Besides basic segments new ones are appearing and taking root reflecting social function, they don't make much profit, but are very convenient and attractive for visitors.

The main new element is children's fests and celebration activities of the main holidays or just seasonal. Interesting to mention:

all parties benefit from it: parent get free entertainment just by their home, tenants act as sponsors and advertise their products, visitors attend their and neighboring shops, food places, supermarket. Gradually a loyal attitude to the shopping mall appears, especially if the even was successful [12]. Many families, leaving nearby can come together or get acquainted, which cultivates positive climate in the neighborhood.

Almost all shopping centres already have kids' zones with free sensor screens for children with drawing or puzzle games.

A similar effect has exhibitions and master-classes for grown-ups. A shopping centre can support local artists, painters, musicians or invite from the city.

Current generation is very environment-oriented, sharing ideas of reasonable economy, things re-use, waste sorting and recycling. Shopping centres also don't stay away from the green movement: there are separate waste bins at the floors, special boxes for batteries, lamps, clothes and other things. People know, that in their neighborhood there is a place where they can apply their care about the planet and the idea is shared [13].

Parking place comes at hand as during the last 5–7 years electro scooters and electro bicycles, not to mention bicycles have become extremely popular and the malls' parking is a very convenient place to rent or to leave this kind of transport.

Charging zones for smart phones and other devices, free wi-fi, info via applications is also for mutual use.

It's becoming popular to place express health-check points at shopping centres: just pressure and temperature scanners or small cabinets with specialists.

Local residents now can meet a technological innovation, such as robot-administrator, helping with navigation or other issues at their own neighborhood centres, without going to central regional malls.

Original museums, reading corners or book-exchange points are also a part of shopping centres' concept now.

There is news about shopping centre exterior space as well. Leisure territory makes a mall more popular and successful. Hodinskoe Pole Park is a good example of such symbiose: sport facilities, green landscaping, children's playgrounds and one of the most popular in Moscow shopping centres "Aviapark".

Based on the Standard developer has an opportunity at the area planning stage incorporate in the malls' concept not only revenue interest, but also IDT improvements, for example: to place a shopping centre (or even several, depending on the territory size) at



Fig. 2. A variant of effective tenant mix for a Neighborhood center

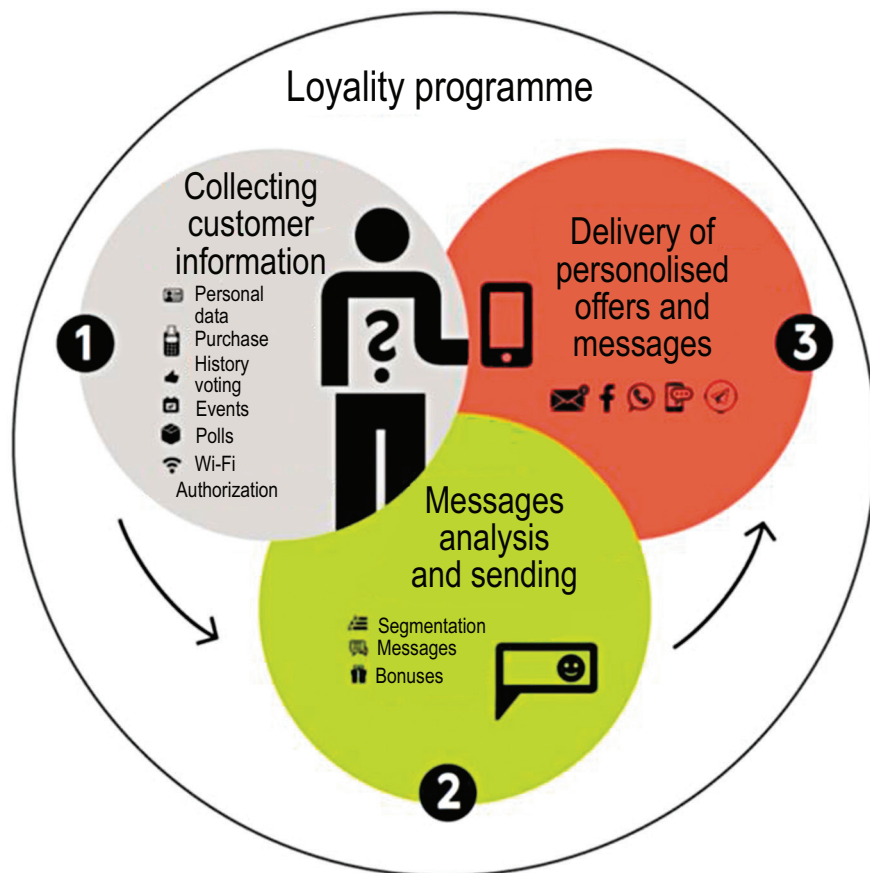


Fig. 3. Loyalty programme of a shopping center

the most convenient places, to calculate optimum size, to plan social and public elements, necessary for the neighborhood, to do landscaping considering parking and vehicles, playgrounds, to combine quest and residential parking (especially for "free of cars" courtyard concept), to add an extra bus stop.

Functional neighborhood shopping centres' concept at the new construction areas is preferable, and that is exactly what developer company ADG suggested even before the IDT law: the company worked out a net of new Neighborhood/Convenience shopping centres for existing residential areas. The main idea is to compensate the lack of local attraction points after complete redevelopment of soviet period movie-theaters into leisure and shopping centres.

According to the ADG the effective tenant mix of everyday goods and services, coffee places, restaurants, movies, activities and entertainment (Fig. 2) provides high traffic during the whole day [14].

The individual approach of Customer loyalty programme creates close long-term relationship with local habitants offering them extra occasions for visits. Individual communication system allows to target the offer to those really interested, which is reflected at Fig. 3. The constructive open plan effect combines with confidential relationship with residents and online resources.

There are also insights about residents for better range of products, online full range, centralized network of pick-up points that allow to reach the maximum income per square meter.

Developers are interested in taking into consideration IDT concept for designing shopping centres as the last 10 years have confirmed the benefit of enlarging social function and including entertainment and public zones [15]. The more comfortable and interesting a shopping centre is the more traffic of loyal visitors it has and the longer they stay at the centre the higher is the bill. And the city and its residents get effective infrastructure and a possibility to satisfy needs without inconvenient long trips as well as additional working places. The IDT concept gives developers convenient instruments, such as the Standard, practical recommendations, which promote complex approach at the stage of planning new areas or developing the existing ones. As a result, neighborhood shopping centre becomes a place that residents love, are proud of and consider to be a part of their life.

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Девелопмент торговых центров в рамках концепции комплексного развития территорий

В статье предлагается рассмотреть не коммерческую составляющую девелопмента ТЦ, а его роль в создании комфортной среды при реализации комплексного развития территорий (КРТ). Появившаяся концепция предполагает создание удобных районов для жизни с продуманным размещением социальных, общественно-деловых объектов. Важная роль в создании комфортной городской среды отводится центрам притяжения в новых или существующих районах, такую функцию во многом могут реализовать районные или окружные ТЦ. Приведена статистика ввода торговых площадей, которая подтверждает популярность строитель-

ва новых районных ТЦ в различных городах России. Автором выделены новые элементы, выполняющие социальную функцию, привлекающие посетителей и удовлетворяющие потребности живущих по соседству горожан. Исследуются рекомендации в Стандарте КРТ в отношении недвижимости торгового назначения для малоэтажной, среднеэтажной и центральной моделей при новой застройке. Для девелоперов предложены варианты организации внешней среды, которые нужно предусмотреть при разработке концепции микрорайона и выборе местоположения для ТЦ, связанные с парковкой, благоустройством. В качестве примера развития уже существующих районов рассмотрен проект создания соседских центров в результате редевелопмента советских кинотеатров одной из девелоперских компаний Москвы. При разработке концепции основное внимание уделяется взаимодействию с жителями района, поддержанию

программы лояльности. Благодаря созданию оптимального набора арендаторов увеличивается посещение ТЦ в различное время, развлекательные мероприятия или скидки становятся поводом для дополнительных визитов. Статья помогает оценить, насколько концепция КРТ помогает сблизить интересы бизнеса и общества, какие инструменты и факторы этому способствуют.

Ключевые слова: стандарт комплексного развития территорий, комфортная городская среда, новые элементы районного торгового центра, пешеходная доступность, проходимость, общественные места, социальная функция ТЦ, центральная модель, окружной торговый центр

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