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Real estate in the focus of development priorities 2030 (based on the materials of the Gaidar Forum 2022)¹

The annual Gaidar Forum traditionally opens the agenda for the development of the national economy for the next year with an eye to the implementation of strategic goals. The dynamism of modern economic processes requires not just taking into account external challenges and internal problems, but forecasting changes in the global economic landscapes, modeling systemic changes in the allocation of productive forces and the possibilities of integrating Russia into existing and emerging technological chains. The intensive development of new industries, the targeted focus of investments on investments in the knowledge economy, the transformation of the industrial, transport, energy and housing and communal framework of capital funds set a new rhythm of construction. Its ultimate goal is to create a real estate sector that provides balanced spatial development, accelerated energy transfer and advanced development of human capital as a basis for improving the comfort, quality and standard of living of citizens.

The range of topics discussed touched upon almost all strategic objectives of achieving the goals of national projects. Priorities for the development of the real estate sector were announced in various contexts: digital and administrative transformation, scientific and personnel support, formation of a comfortable urban environment, housing construction and mortgage boom, master planning tools, etc. At the same time, behind the obvious thematic favorites of the new rhythm of construction and transformation of the real estate sector, a number of important problems remained in the "shadow" of panel discussions. Among them: the euphoria of housing construction and the danger of possible imbalances, professional transformation and the challenges of digitalization, the risks of human-centered and distance education, the discomfort of the business environment in real estate, the vacuum of modern tools for resolving economic disputes and coordinating economic interests, etc.

Developing a view on the priorities of the development of the real estate sector in terms of ensuring the rights of shareholders and the transition to project financing, the issues of ensuring the quality of housing and communal services, further capitalization of the housing stock, mechanisms for resolving contradictions between tenants and management companies, etc. remained outside the Forum. These issues, being an integral part of a comfortable business environment and the living environment of citizens, actualize a new context of development from Priorities to Parities of economic interests and tracks of development of "power – business – man".

Keywords: national economy, development priorities, strategic focus, real estate, digitalization, information modeling, challenges, problems, economic interests

The Prime Minister of the Russian Federation, opening the Gaidar Forum, stressed that active work is underway to ensure accelerated development. Thus, over the past year, forty-two new initiatives have supplemented the Unified Plan for Achieving the National Development Goals of the Russian Federation [1]. Despite the steady growth of the economy (approximately 3 % per year), investments in fixed assets should grow at a faster pace in order to create conditions for the sustainable development of not only basic, but also new sectors of the economy. This, according to M.V. Mishustin, investments in the development of information technology, genetics, electronics. Their volume should grow 3 times in the near future. Separately, investments in infrastructure projects that break all historical records were noted. Their necessity is due to the fact that without creating

conditions for a rapid transition to a new technological order of low-carbon development of the national economy, the lag behind the leading countries in the field of high technology may be critical.

The priorities of technological development set not only goals that are quantitatively incommensurable with past periods, but also require qualitative, strategically focused transformations. This is not only about the new financial market strategy (according to Forum participants A.G. Siluanov and E.S. Nabiullina, "It is currently being finalized"), but also about the real estate sector, especially in its industrial, energy and transport segments. The scale of the tasks, and they were discussed at almost all expert panels of the Forum, required the development of a new project development pool, which will be supported by a set of *Infrastructure menu* measures (infrastructure budget

¹ The article was prepared as part of the research work "Alternative dispute resolution mechanisms in construction as a factor in the practical implementation of National development projects in Russia", RANEPA, 2022.

loans, infrastructure bonds, mechanisms for restructuring budget loans, budget funds from the redistribution of excise taxes, etc.). Its implementation, quite obviously, will require the consolidation of all available resources. At the same time, A.V. Chibis, the Governor of the Murmansk Region, stressing the limitations of the budget system and the need to attract private investment, supported the initiative of the Government of the Russian Federation regarding the introduction of «one-stop-shop technologies» for investment initiatives at any level of the economy. The Governor also noted the extreme importance of supporting the territories of advanced development, in particular the Arctic zone, the transformation of which is currently being carried out as planned, despite the coronacrisis, external challenges and threats. The successful implementation of the project for the construction of the Meteor ice arena on a concession basis formed the basis of the extended proposals of the Government of the Murmansk Region on the establishment of the Institute of investment plenipotentiaries. Its purpose is to support the investment cycle on an ongoing basis. "The government must compete for investment" [2]. A.V. Chibis drew attention to the fact that this will be facilitated by eco-tools, platform solutions, project offices that ensure interdepartmental interactions, as well as supporting the readiness of government and business for long-term cooperation based on the stability of requirements and rules.

The analysis of the goals and meanings of the main development tracks discussed by the majority of expert panels of the Gaidar Forum 2022 [3] allows us to systematize them in the following main directions:

1. Transformation of the landscape of the Russian economy with an emphasis on: target contexts, the need to assess the effectiveness of the efforts and actions of the authorities, as well as the accountability of the latter.
2. Launching economic growth, including through the development of new industries, end-to-end support for workers, reducing the tax burden on small and medium-sized businesses, replenishing the labor market with qualified personnel, motivating private investors, etc.
3. Focusing on the strategy of low-carbon development of all sectors and spheres of the national economy and supporting its implementation with ecosystem tools.
4. Integrated development of territories with a new methodology of urban planning, principles of master planning, investment competitiveness, metropolitan area, etc.
5. Ensuring the human-centricity of education, its forms and effectiveness in conditions of accelerating transformational processes.

Summarizing the many approaches, accents and points of view, it is no exaggeration to say that at all the Forum venues, the absolute dominant of the problems of resource provision was undoubtedly not only and not so much financial resources as the quality of labor resources. The lack of specialists in the field of investment support, urban planning, spatial development, healthcare, logistics, finance, economic and food security, strategic planning and targeted focus was also discussed within the quality of the expert community ("Expertise in Russia: between consulting and public policy" with the participation of the President of the Kurchatov Institute M.V. Kovalchuk, President of the Russian Union of Industrialists and Entrepreneurs A.N. Shokhin et al.), and in assessing Russia's place in the world ("Russia and the World: Macroeconomic priorities" with the participation of the Chairman

of the Central Bank of the Russian Federation E.S. Nabiullina, Minister of Economic Development of the Russian Federation M.G. Reshetnikov, Minister of Finance of the Russian Federation A.G. Siluanov), and when summing up the results of the introduction of information modeling technologies in construction ("Information modeling technologies — a driver or barrier to the development of the construction complex" with the participation of the president of the association "National Association of Organizations in the field of Information Modeling technologies" M.Y. Viktorov, head of the FAA "Glavgosexpertiza of Russia" I.E. Manylov, Deputy Minister of Construction and Housing and Communal Services of the Russian Federation K.A. Mikhaylik), and when solving problems of energy transition and infrastructure construction.

It should also be noted that the strategy for the development of construction and real estate on the site of the Gaidar Forum 2022 was given unprecedented attention. Director of the Association of Innovative Regions of Russia (AIRR) I.V. Fedotov in an interview with Deputy Prime Minister of the Russian Federation M.Sh. Khusnullin discussed the most important issues of the development of the construction industry. Seven main construction clusters with financing of 7 trillion rubles annually for 10 years, filling of 20 trillion mortgage portfolio with residential real estate, development of 1.5 trillion rubles. from the Infrastructure menu and, finally, the acceleration of the investment cycle, according to M.Sh. Khusnullin, will become a real test of the viability of the domestic construction industry [4].

It should be noted that five years ago the construction business was in the shadow of modern technological and innovative trends. The results of 2021 clearly confirmed not only the highest adaptability and scalability of the construction business, especially in solving the housing problem, but also the outstripping character in the pace of digitalization. So far, in industrial and civil construction, the current level of implementation of information modeling technologies is, according to Dmitry Kazachen, Director of Transformational Projects at Dassault Systemes, a little more than 1 %. Meanwhile, the growth of the global digital twins market is estimated at 36 % annually (about \$2 billion) in the next 5 years [5]. According to expectations, the technology of information twins by 2030 will help companies get a total economic benefit of \$ 1.3 trillion. How to reach the world level of implementation rates? What hinders the introduction of information modeling technologies in our country? How to prepare specialists with the necessary qualifications? — the range of issues discussed in an interactive mode by the representative of the industry center (Deputy Minister of Construction and Housing and Communal Services of the Russian Federation K.A. Mikhailik), software developer (N. Burlitsky) and president of the association "NOTIM" (M.Y. Viktorov). The main focus of the discussion was on the design stage, linking and optimizing the procedures for conducting state design expertise of documentation, as well as historical, cultural and environmental expertise. Restarting the investment cycle for the implementation of the goals of national projects will also require the introduction of 3D printing technologies, artificial intelligence, prefab buildings, etc. In addition, the digital format, as practice has shown, allows you to quickly implement protective measures for the use of environmentally harmful or economically inefficient construction materials and technologies. Platform solutions, according to experts, are able to significantly expand the number of participants in investment and construction activities, optimize economic relations, ensure the responsibility of the parties, develop alternative methods of examination and

► resolution of economic disputes, etc. All this will become almost a decisive factor in accelerating the investment and construction cycle.

For the first time in the modern history of Russia, urban planning problems were discussed on several panels at once, touching on both sectoral and territorial development problems, as well as concerning the assessment of the potential of new urban development tools and their legislative consolidation. Thus, the Institute of Spatial development mentioned by M.Sh. Khusnullin with its characteristic new mechanisms of integrated development of territories [6] became the subject of an acute discussion on the panel "Master Planning". Four main approaches to the development of master plans were discussed: cities, agglomerations, local territories, elements of planning territories. In the modern understanding, the main difference between the master plan and the master plan is the full implementation of the scenario approach in the territorial planning documents. The participants of the discussion drew attention to the fact that, unlike the master plan, the master plan should specify:

- 1) economic prerequisites for its implementation;
- 2) tools for implementing and supporting decisions made regarding development scenarios;
- 3) crisis maps focusing actions on possibly acute problem situations;
- 4) the results of the discussion of the main development tracks with the population, etc.

In other words, active supporters of the transition to master planning emphasize its strategic orientation with the details of only the most important issues. The format of the document should be understandable and accepted by the population. It is in the direction of conceptual focus and strengthening of dialogue regimes, including at the levels of industries and departments, that revisionist activity is developing in relation to the entire Urban Planning Code of the Russian Federation. Systematizing the debatable aspects of construction development and the problems of spatial development of the country raised by the Gaidar Forum 2022, construction as an industry that ensures the creation and operation of the stock framework in an economically efficient and environmentally safe format acquires new properties, presented in Fig.

Taking into account the properties of adaptability and innovativeness reflected in strategic development documents [7–11], discussions were devoted to almost all discussion platforms of the Forum. At the same time, comfort as a new property of development, designed to create zones of attraction for investment, innovation, active economic agents and skilled labor, is still used exclusively in relation to the urban environment. With regard to the currently accepted "climatic" accents (investment or business climate), we note that the semantic analysis of the use of a concept that does not directly depend on the will and consciousness of the participants in the development gives it a possibly objective character, but clearly carries the burden of uncontrollability. In this regard, the concept of "comfort of the business environment" depends on the actions of the authorities, the expectations of economic agents and the population, allows and even forces the parties to a dialogue regime and conflict-free development. The perspectives of the comfort of the business environment in the first approximation should cover:

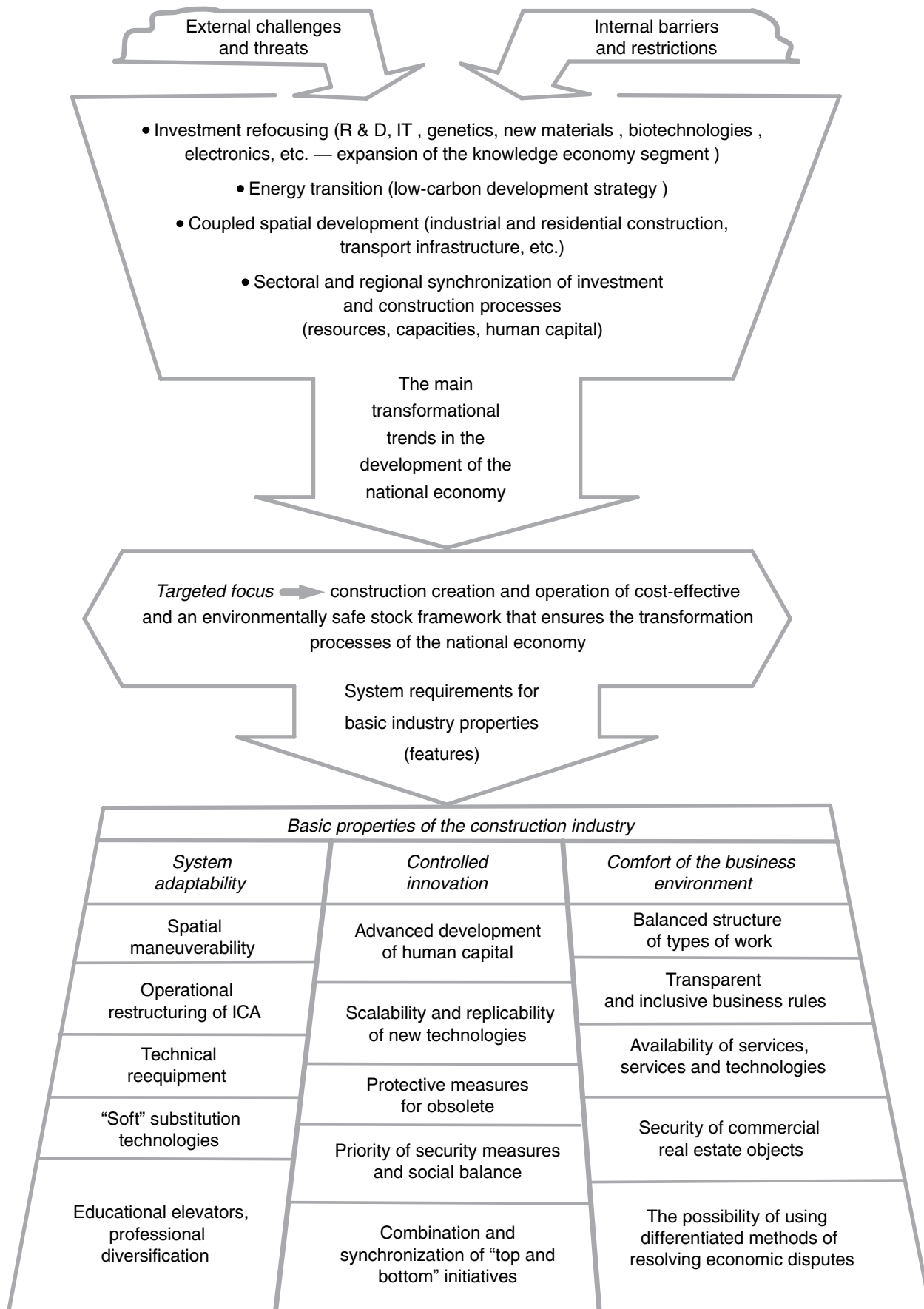
- 1) a balanced structure of types of investment and construction activities, including the availability of highly demanded

specialized segments. This will ensure timely and high-quality implementation of all stages and phases of the investment and construction cycle;

- 2) a system of transparent and inclusive rules for conducting investment and construction activities covering the segments of planning, incentives, control, nature of responsibility, support measures, restrictions, etc.;
- 3) business, career, educational elevators that support business and investment activity of all participants in investment and construction activities;
- 4) ensuring the availability of electronic services, services, information technologies;
- 5) the necessary and sufficient structure of commercial real estate objects, allowing to implement and develop business processes;
- 6) the whole range of mechanisms for resolving economic disputes and preventive methods for preventing conflicts of interest.

It seems that this context has fallen out of the field of view of the discussion of the strategic guidelines of the Government of the Russian Federation. Thus, the success of housing construction was repeatedly heard at the Forum. Being an example of timely decisions taken by the central government, the readiness of large developers to use the mechanisms of project financing of construction, brought to the automatism of mortgage lending, a record number of housing (90 million sq. m.) was put into operation in 2021 [12]. Meanwhile, the business environment formed in the housing construction segment suits no more than 10 % of participants in investment and construction activities. The beneficiaries of the success achieved are not at all construction organizations operating in the housing construction segment, or the population. By default, banks were the first to win [13, 14]. And the social and economic effects of strengthening the family, increasing the birth rate, etc., as shown by the research of the Department of Investment and Construction Business and Real Estate Management of the RANEPa, are not confirmed by the surveys conducted. Practice has shown that:

- 1) mortgage encumbrances, on the contrary, slow down the birth rate. Despite the benefits and maternity capital, they burden family relations, narrowing the base of the family budget, restrict economic freedom and initiatives, excluding even minimal risks of activity;
- 2) housing construction euphoria, in isolation from the development of city-forming enterprises and the creation of new high-performance and well-paid jobs with a promising advantage, deadens capital, reducing the liquidity of construction products and creating sparsely populated ghost towns and districts;
- 3) the emergency nature of investment and construction processes in the housing sector does not affect the quality of the living environment in the best way. Infrastructure provision is lagging in nature, and the urban environment in areas of mass development is overloaded in all parameters of a comfortable environment [15];
- 4) imbalances are being formed not only in the real estate market, but also in the labor market. Specialists of the construction industry specializing in the creation of capital construction projects in the municipal, industrial, energy transport spheres are being "washed out". Consequently, there is



▶ a high probability of loss of skills and basic technologies of specialized construction;

- 5) mass multi-storey buildings create a complex technological problem for future generations — the need for demolition and disposal of multi-storey buildings. Analysis of urban renewal processes has shown that the time leverage of the investment cycle ranges from 15 to 30 years. And this means that the liquidation of outdated real estate will be required [16].

Thus, the analysis of the priorities of construction development announced at the Forum showed that most of the discussion contexts ignored the risks of strategic focusing of construction development mainly on the housing segment. This can lead to an increase in the processes of capital mortification and deepening of market imbalances, as well as the emergence of deferred problems and burdening future generations with the need to demolish and dispose of high-rise buildings.

In order to develop the contexts of respect for citizens' rights discussed at the Forum, we note that the main focus of protecting those in need of housing is, in fact, limited exclusively to protecting the rights of shareholders. But this is far from a full-fledged and systematic solution to the housing problem, which consists in meeting the need for housing and ensuring its quality. Only the operational phase of the project cycle, which is an order of magnitude longer than the design and construction period, shows both the degree of satisfaction and the quality of housing provision. A huge layer of problems of interaction between residents and management companies has so far remained beyond the priorities announced at the Forum. A clear bias in favor of respecting the rights of shareholders with only a formal mention of the rights of tenants requires in-depth study, extensive discussion and a systematic solution. In the proposed draft Strategy for the Development of the construction industry and Housing and Communal Services of the Russian Federation until 2030 with a forecast for the period up to 2035 [17], the formed licensing control system is only the first step that allows changing the management company. While contradictions, controversial issues, regardless of the type of housing management model, will constantly arise. The absence of a system/mechanisms/methods for resolving economic disputes, even with the development of a digital client-centric housing and communal services management system, will not allow creating a conflict-free comfortable environment for life and activity. Purposeful work on the coordination of interests and the resolution of contradictions of "power – business – man" should come out of the shadow of economic discussions and become a decisive factor in creating a comfortable conflict-free business environment, which is designed to "improve the comfort, quality of real estate and the standard of living of citizens" [17].

Assessing the contexts of development priorities discussed at the Forum, we note the dominance of a client-oriented approach that expands its boundaries in the context of digitalization, the emergence of cross-cutting responsibility both vertically and horizontally, focusing on a low-carbon development strategy and the expansion of the knowledge economy, the human-centricity of ecosystems and educational trends. The system requirements of innovation, seamless and conflict-free investment and construction processes, the problems of forming a comfortable business environment with a variety of out-of-court dispute resolution methods that allow in fact to accelerate investment and construction cycles, require in the near future a change of emphasis from Priorities to Parities of interests and development tracks of all participants in a conflict-free economy!

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Сфера недвижимости в фокусе приоритетов развития 2030 (по материалам Гайдаровского форума 2022)¹

Ежегодно проводимый Гайдаровский форум традиционно открывает повестку развития национальной экономики на очередной год с прицелом на реализацию стратегических целей. Динамичность современных экономических процессов требует не просто учета внешних вызовов и внутренних проблем, а прогнозирования изменения мировых экономических ландшафтов, моделирования системных изменений в размещении производительных сил и возможностей встраивания России в имеющиеся и формирующиеся технологические цепочки. Интенсивное развитие новых отраслей, целевая фокусировка инвестиций на вложения в экономику знаний, трансформация промышленного, транспортного, энергетического и жилищно-коммунального каркаса капитальных фондов задают новый ритм строительства. Его конечная цель — создание сферы недвижимости, обеспечивающей сбалансированное пространственное развитие, ускоренный энергопереход и опережающее развитие человеческого капитала, как основу повышения комфорта, качества и уровня жизни граждан.

Диапазон обсуждаемых тем коснулся практически всех стратегических установок достижения целей национальных проектов. Приоритеты развития сферы недвижимости были озвучены в различных контекстах: цифровая и административная трансформация, научное и кадровое обеспечение, формирование комфортной городской среды, жилищное строительство и ипотечный бум, инструментарий мастер-планирования и др. В то же время за явными тематическими фаворитами нового ритма строительства и трансформации сферы недвижимости ряд важнейших проблем остался в «тени» панельных дискуссий. Среди них: эйфория жилищного строительства и опасность возможных дисбалансов, профессиональная трансформация и вызовы цифровизации, риски человекоцентричного и дистанционного образования, дискомфортность деловой среды в сфере недвижимости, вакуум современного инструментария разрешения хозяйственных споров и согласования экономических интересов и др.

На Форуме широко освещались приоритеты развития сферы недвижимости в части обеспечения прав дольщиков и перехода к проектному финансированию, но за его рамками остались вопросы обеспечения качества жилищно-коммунальных услуг, дальнейшей капитализации жилищного фонда, механизмов разрешения противоречий жильцов и управляющих компаний и др. Эти вопросы, будучи неотъемлемой частью комфортной деловой среды и среды проживания граждан, актуализируют новый контекст развития от Приоритетов к Паритетам экономических интересов и трек развития «власти — бизнеса — человека».

Ключевые слова: национальная экономика, приоритеты развития, стратегическая фокусировка, недвижимость, цифровизация, информационное моделирование, вызовы, проблемы, экономические интересы

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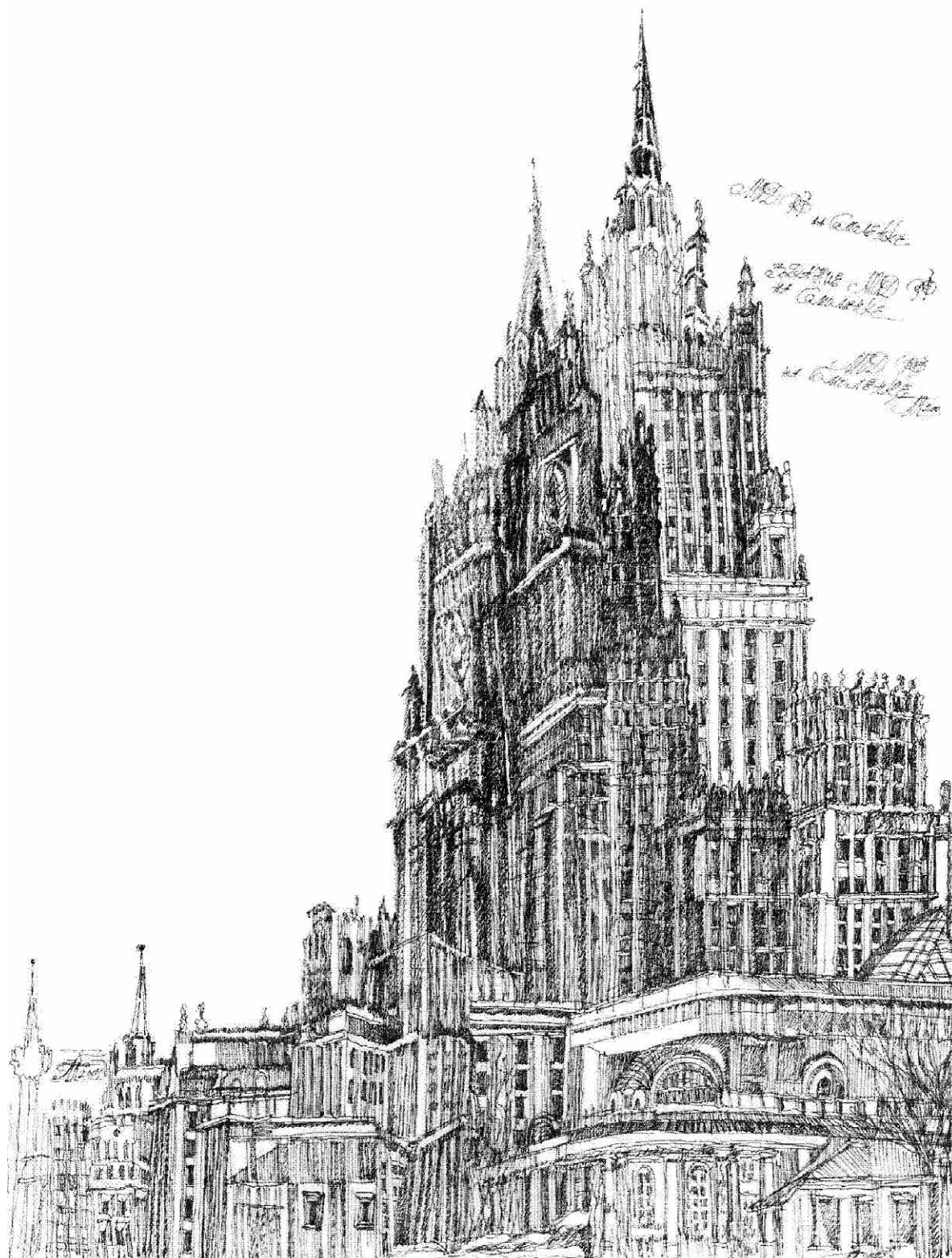
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¹ Статья подготовлена в рамках научно-исследовательской работы «Альтернативные механизмы разрешения споров в строительстве как фактор практической реализации Национальных проектов развития России», РАНХиГС, 2022 г.

For citation: Yaskova N.Yu. Real estate in the focus of development priorities 2030 (based on the materials of the Gaidar Forum 2022). *Real estate: economics, management*. 2022; 1:6-12.

Для цитирования: Яськова Н.Ю. Real estate in the focus of development priorities 2030 (based on the materials of the Gaidar Forum 2022) // Недвижимость: экономика, управление. 2022. № 1. С. 6–12.



Л.И. Павлова. Москва. Здание МИД России на Смоленке. Рисунок, тушь, перо.