



# Expat Housing Overview:

Russia and CIS H1 2017

A Message From An Expat
Moscow Housing Market
CIS Housing Market
Legal and Immigration News

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# A Message from an Expat



## Kamila Richon

Expat from France

«We could never have imagined how much Moscow had changed over those years!»

My love story with Moscow had two beginnings. The first time, my family moved to Moscow in 2003 and left it after three years, in 2006. We never expected to return here again, because France is our native country.

But fate had other plans, and we returned to Moscow in 2012:)
We could never have imagined how much Moscow had changed over those years! How modern and beautiful it has become!

We just celebrated our fifth year in Russia, and I love it so much!

My husband and I really enjoy the modern parks and like to spend our time outdoors in both winter and summer. Our Russian friends even say that since Gorky Park has been renovated, you don't even need a dacha to rest over the weekend. The parks in Moscow are real cultural open air centers with lots of concerts, sport events, and holiday parties.

According to our children, the only issue with

Russia is that it's far, far away from our home country, and the visa requirements are limiting, if not stopping, our friends and family from travelling, so we cannot see each other as often as we would like to. But this situation gives us the opportunity to travel to them ourselves.

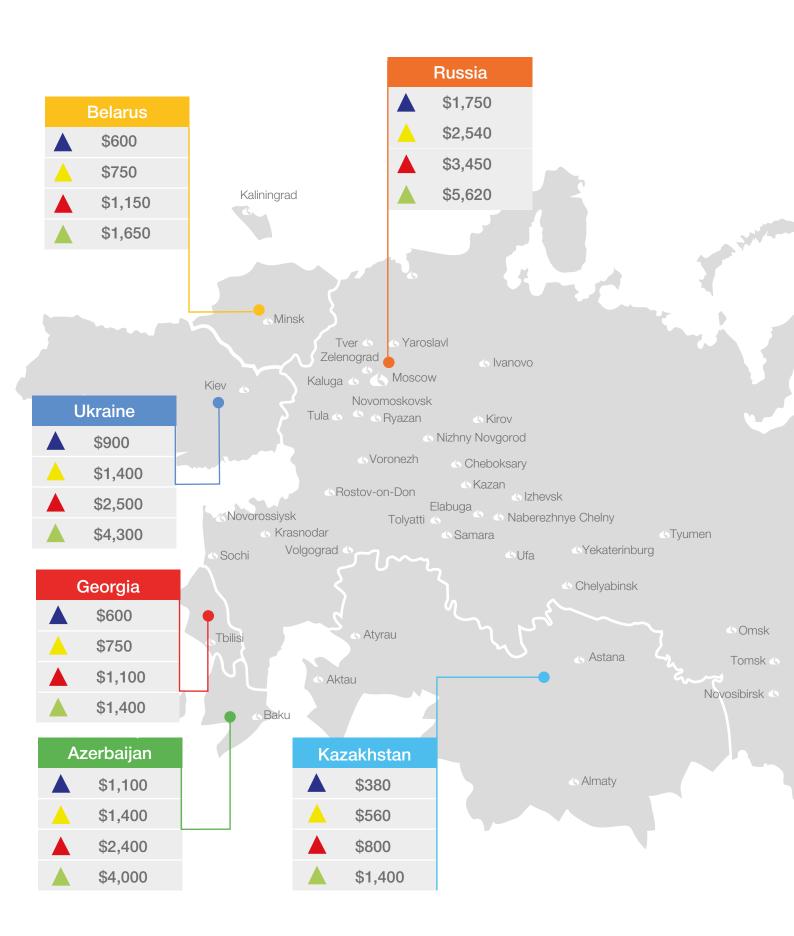
"The heat and cold, tea and comfitures, veniki and other beauty procedures, philosophical, never-ending discussions with friends are quite magical."

The banya ritual is what we enjoy the most, especially in the winter! The heat and cold, tea and comfitures, veniki and other beauty procephilosophical, dures, never-ending discussions with friends are quite magical. It's a perfect place to really get to know each other and share thoughts when you are "naked", because you are only wearing a simple towel and do not have any gadgets, smart phones, or fancy cars to show off or hide behind.

Our goal for next year is to visit Lake Baikal, the islands of Karelia, and Kamchatka. And our dream is to cancel the visa requirement, so our friends can discover how amazing this country is!



# Map of Housing Market





# Supporting you wherever you are!





# Moscow Housing Market



Evgenia Schramm
Operations Director
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"At present, the choice of high-budget rental apartments is wide and varied, and the volume of supply is at its highest point for the past year. At the same time, amid landlords' increased activity, the number of requests from potential tenants is also growing. This positive trend is traditional for this period and connected with the fact that many tenants, especially families with children, are trying to solve the rental housing issue by August or early September, before the start of the business season and academic year".

### Supply

Over the past three years, the volume of high-budget apartments for rent in Moscow has increased by approximately a quarter (26%).

Over the past year, the largest increase in supply is observed in three main districts: Zamoskvorechye (+ 20%), Leningradsky Prospekt (+ 17%) and Frunzenskaya (+ 10%). A noticeable decrease in availability of high-budget apartments from June 2016 was found in Kutuzovsky Prospekt (-20%) and Tsvetnoy Boulevard (-18%).

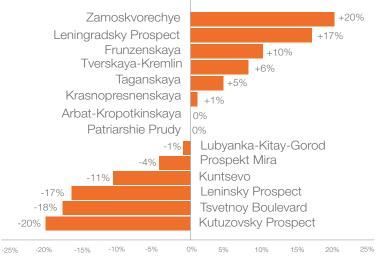


Chart 1.1 Supply volume growth by area, H1 2017

The TOP 3 districts in terms of supply are Arbat-Kropotkinskaya area, with 20% of market share, Tverskaya - Kremlin and Zamoskvorechye areas, with 15% and 10% of all lots, respectively.

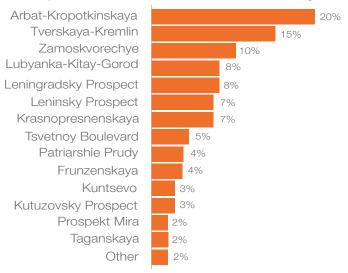


Chart 1.2 Analysis of the most popular areas in terms of supply

Number of Rooms

Thus, in June - early July 2017, we are seeing the maximum volume of high-budget apartments for rent in Moscow for the past year. The last time a comparable volume of supply was registered in July of last year.

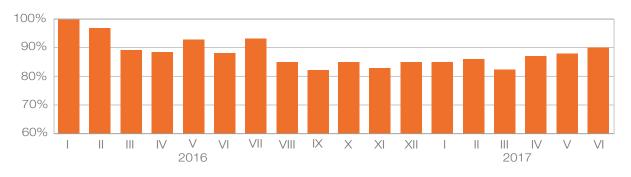


Chart 1.3 Dynamics of the supply of Moscow's prime rental market (January 2016 – 100%)

At the present moment, the most expensive apartments for rent are offered in the following districts: Arbat-Kropotkinskaya (\$6,580 per property per month), Krasnopresnenskaya and Patriarshiye Ponds - \$6,400 and \$5,890 per property per month, respectively.



Chart 1.4 Supply analysis of expat housing in Moscow in terms of rental budget

Two and three bedroom apartments are the most common options on the high-budget rental market in Moscow. The volume of supply of such objects is more than half of all exhibited lots (57%), distributed in almost equal proportion - 33% and 24%, respectively. At the same time, the share of studios for rent is minimal, at only 5% of the total supply.

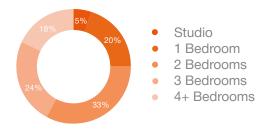


Chart 1.5 Supply analysis of expat housing in Moscow in terms of number of rooms

Budget

#### Demand

In June 2017, demand from potential tenants was 8% higher compared to the same period two years earlier.

The volume of demand from tenants has increased by 15% from the end of 2016 to the present (comparing the period from November to December 2016 and May to June 2017).

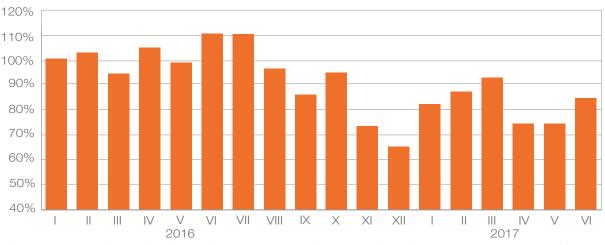


Chart 2.1 Dynamics of the demand of Moscow's prime rental market (January 2016- 100%)

Leningradsky Prospect is traditionally the most popular district in the high-budget rental market in Moscow. Since the beginning of the year, apartments in this area were of interest to almost 16% of all potential tenants. The second most popular location for rent is Arbat-Kropotkinskaya, at 10% of all requests.

Compared to the same period last year, the average tenant budget has increased – \$4,716 against \$3,650 in 2016. More than a quarter (28%) of all tenants are interested in renting an apartment at around \$2,000-\$4,000 per month.



Chart 2.2 Demand analysis in terms of rental budget

As of June 2017 apartments with one and two bedrooms have been the most popular among tenants since the beginning of the year.

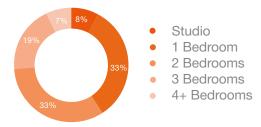


Chart 2.3 Demand analysis in terms of number of rooms



# Supply – Demand Correlation



Chart 3.1 Dynamics of the supply and demand of Moscow's prime rental market (January 2016 – 100%)



Chart 3.2 Supply and demand analysis of expat housing in Moscow in terms of rental budget



Chart 3.3 Supply and demand analysis of expat housing in Moscow in terms of number of rooms



### Rental Rates and Budgets



\$5,275 Average Supply Budget (against \$4,750 in 2016)



Leningradsky prospect
The most popular
area in demand



\$23,700 PCM TOP-100\* (Prime Central Moscow TOP-100)



\$4,716 Average Demand Budget (against \$3,650 in 2016)

\* PCM TOP-100 Index is calculated as an average weighted rental rate of 100 most expensive rental apartments in Moscow.

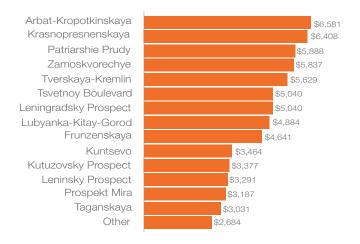


Chart 4.1 Average budget structure of supply by area (June 2017)



Chart 4.2 Dynamics of the average rental rates in Moscow's prime rental market (January 2016-100%)

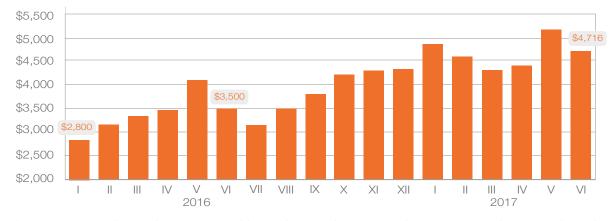


Chart 4.3 Dynamics of the average asking price for the tenancy in Moscow's prime rental market



Area	Arbat/Kropotkinskaya, Patriarshy Ponds, Tverskaya, Lubyanka/Kitay-Gorod, Zamoskvorechie		Close to International schools (Leningrasky prospect, Kuntsevo)		
Description	Business class	Elite class and Premium class	Business class	Elite class and Premium class	
1 bedroom	\$1,400-\$2,500	\$2,000-\$3,000	\$1,200–\$3,000	\$1,400–\$3,500	
2 bedroom	\$1,800-\$2,700	\$3,200–\$6,500	\$1,100-\$3,000	\$2,500-\$5,500	
3 bedroom	\$2,700-\$3,500	\$4,200–\$8,500	\$2,000-\$3,500	\$4,200–\$7,500	
4 bedroom	\$3,700–\$6,000	\$6,500–\$9,000	\$3,500-\$5,000	\$6,000–\$8,300	
5+ bedroom	\$7,000-\$10,000	\$9,000–\$11,000	\$5,500-\$9,000	\$9,000–\$10,000	

Chart 4.4 Analysis of the average asking price/number of bedrooms/class

Business class	Apartments in pre-revolutionary, Stalin-period or ministerial buildings. Clean secure entrance with concierge or quality intercom arrangement. Quality renovation with the use of standard renovation materials (not designer renovation), in many cases furnished in IKEA style/quality.
Elite class	Apartments in pre-revolutionary renovated bulidings or new buildings. Presentable entrance with high quality renovation and concierge or security, in most cases the building has underground or enclosed parking. Apartments with high quality designer renovation, furniture and appliances.
Premium class (unique properties)	Apartments in new premium class buildings - mostly "club buildings" - premium quality designer entrance renovation, underground parking, high multi-level security. The apartments have renovation of high quality, furniture and appliances of top brands, very often unique features like size of more than 300 sq.m., terraces.



### International compounds

Since the beginning of 2017 rental rates in international compounds have remained at the same level, with a wide variety of accommodation options and housing types available for tenants.

There is currently no waiting list; however, due to the active increase of expat relocation in the summer period, the supply volume in compounds is expected to decline until the beginning of the 2017 school year.

It's important to remember that Rosinka compound maintained its rates in USD, but also provides a RUB option. This particular compound is flexible on price for potential tenants.

Serebryany Bor has significantly changed its policy, and its rates no longer include water nor electricity. Tenants are now liable for the payment of these services. The approximate cost of these amenities in a 300 sq.m. house may reach RUB30,000 per month during the winter.

Compound	House Type	# of Bedrooms	# of Bathrooms	Size, sq. m.	Rent July 2017
Pokrovsky Hills					
Tver-1	Town-House	3	2.5	160	\$6,000
Tver-3	Town-House	3	2.5	209	\$10,500
Suzdal-1	Town-House	3	2.5	200	\$8,000
Suzdal-2.3	Town-House	3	2.5	212	\$12,000
Novgorod-1	Town-House	4	2.5	215	\$12,500
Novgorod-2.3	Town-House	4	2.5	220	\$13,500
Yaroslavl-2.3	Town-House	5	3.5	340	\$17,500
Rosinka					
Business	Town-House	2	2	130	\$3,400
Executive		3	2.5	151	\$7,500
Family	Town-House	4	2.5	222	\$9,400
Family Deluxe	Town-House	4	2.5	259	\$9,900
Country	Town-House	5	4.5	266	\$10,200
Country Deluxe	Town-House	5	4.5	302	\$11,000
Presidential	Town-House	5	4.5	292	\$11,000
Presidential Deluxe	Town-House	5	4.5	326	\$12,500
Serebryany Bor					
	House	3	2.5	169	\$6,800
	Town-House	5	5	270	\$7,900
	Town-House	5	4.5	253	\$9,000
	Town-House	5	4.5	250	\$9,400
	Town-House	6	4.5	245	\$9,400

Chart 5.1 Analysis of the average asking prices/number of bedrooms and bathrooms/size



# Key Facts of H1 2017

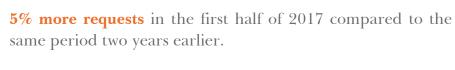


**The maximum choice** of high-budget apartments for rent over the past year.

The **volume of supply increased by 26%** over the last three years.

**\$5,272 per property per month** - the average supply budget.







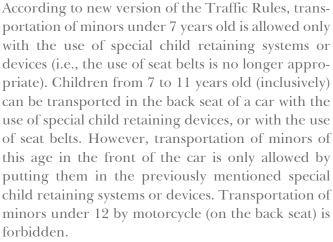
# Key Legal Reforms in Russia



Andrey Lukash Senior Legal Advisor & Project Manager A.Lukash@intermarkrelocation.ru



New amendments concerning transportation of minors



Going forward, it is also now forbidden to leave children under 7 years of age in the car by themselves without an adult.



#### Speed limits of motorcyclists were expanded

Motorcyclists are now allowed to drive at 110 km per hour on the highway (outside residential areas). In the old version of the Traffic Rules, the permitted speed was 90 km per hour (this speed is still applicable when driving on regular roads).

Important to remember, that motorcyclists with driving experience of less than two years are not allowed to carry passengers.



#### Moscow Renovation Program: demolishing of "Khrushchevki"

On July 1st, 2017, President of the Russian Federation Vladimir Putin signed a federal act outlining all aspects of the Moscow renovation program.

The federal act signed by the President enacted amendments to the Federal Act on the Status of the Capital of the Russian Federation. These amendments regulate parts of the renovation program in Moscow, in which old, low-rise apartment blocks, the so-called "Khrushchevki" (constructed in the 1950s and 1960s under Soviet leader Nikita Khrushchev), will be demolished, and their residents resettled in new housing.

According to the law, the renovation of Moscow's housing stock is defined as "a set of measures conducted in compliance with the program of renovation in Moscow which are aimed at renewing the living environment of citizens to create favorable living conditions, allow for public transportation, to prevent the growth of hazardous housing and to develop and improve new housing areas."

It also provides for additional guarantees for the resettled residents: the program will include only those buildings whose residents voted for joining the program, the residents will be resettled within the same sub-district and will have the option of either being placed in an equivalent apartment or receiving money compensation equal to the market-value of the apartment, etc.

Moscow Mayor Sergey Sobyanin has said that the renovation program may freeze or even slightly reduce Moscow real estate prices, considered to be among the world's most expensive (source: TASS).



# **Immigration Overview**



Olga Makeshina
Head of Immigration Services
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Introduction of new migration registration rules for all foreign nationals arriving in Moscow and 3 more Russian cities during FIFA Confederations Cup Russia 2017 is the most substantial news of the first half of a year. Another important news concerns lifting of the ban on employing Turkish nationals. Let us dwell on these and other changes occurred.

#### All foreign nationals

#### New banking details for state fees - Moscow and Moscow region

Starting February 2017 the Migration Office of the city of Moscow within the Ministry of Internal Affairs of Russia (MIA) and the Migration Office of the Moscow region within MIA introduced new bank details for paying state fees.

#### New address for invitation/visa applications – Moscow region

Starting May 2017 invitation/visa applications should be submitted at the following address: 9A Solyanka Street, Moscow.

#### Border control within Russia-Belarus flights for third-country nationals

Starting mid-May 2017 domestic flights between Russia and Belarus were shifted to international sectors of Russian airports. Third-country nationals travelling via these flights go through border control in Russian airports now.

Border control in Belarusian airports still does not take place.

#### Lifting of ban on employing nationals of Turkey

Starting end of May 2017 the ban for employers on assignment of Turkish nationals to labour activity was abolished.

Suspension of visa-free regime for Turkish nationals entering Russia continues to be in force.

#### New registration rules during FIFA Confederations Cup Russia 2017:

Throughout the period of June 01 – July 12, 2017 new rules for the migration registration of foreign nationals arriving in Moscow, Saint-Petersburg, Kazan and Sochi are introduced:

- Migration registration should be carried out within 1 day following the day of the arrival from abroad or from other Russian locations.
- Procedure applies to ALL foreign nationals including Highly Qualified Specialists (HQS) and their family members, nationals of EAEU, business visitors and residence permit holders.
- Migration registration is performed only by local departments of MIA.

I The same registration rules will be applicable next year during FIFA World Cup Russia 2018 from May 25 till July 25 to foreign nationals arriving in Moscow, Saint-Petersburg, Kazan, Sochi, Yekaterinburg, Volgograd, Nizhny Novgorod, Kaliningrad, Rostov-on-Don, Saransk and Samara.



# Astana Housing Market



At the beginning of the summer, there was a slight price spike for rental real estate in Astana due to EXPO-2017. Landlords began to raise prices in the hope that foreign tourists would rent overpriced apartments. However, at the moment the situation has stabilized.

Today, the real estate market in Kazakhstan as a whole, and the rental market for residential real estate in particular, are going through a period of declining prices. Among the regions, Astana is retaining the highest rent prices.

Over the past six months, the rental market in Kazakhstan has dropped by an average of 10-12%. The decline was provoked the fact that there were too many new apartments on the market, some of which moved from the sales segment. The market is over-saturated with offers, which, with low demand from tenants, has also caused declining prices.

The real estate market in Astana is affected by a number of factors, including the past devaluation of the Tenge, a decrease in purchasing power, the growth of utility costs, the supply glut, and many other factors.

To date, there are no specific indications of significant changes in rental rates.

	Studio	1-bedroom	2-bedroom	3-bedroom
Saryarka district	\$450-600	\$600-900	\$700-1,300	\$1,000-2,400
Almaty district	\$300-500	\$400-800	\$500-1,200	\$800-2,300
Yesil district	\$300-500	\$400-800	\$550-1,000	\$900-2,400

# **Immigration Overview**

#### • New visa-free regime

Starting January 2017 the visa-free regime is extended to include the nationals of 45 countries. The allowed period of stay without visa is 30 days.

#### Amendment of new foreign nationals' employment rules

Starting January 2017 amendments to new procedure of issuing Permission for attracting foreign labor force (hereinafter Work permit) were added. Here are the main of them:

- The list of persons who are exempt of Work permit was introduced. Heads of foreign companies' branches and representative offices are included to this list.
- Foreign companies' branches and representative offices are exempt of following foreign-to-local ration rule, if the number of their employees does not exceed 30.
- Changes in Inter-corporate transfer (ICT) regime were introduced.







Despite seasonal factors and high utility rates, demand for rental apartments in Kiev is growing. During the past year, rental rates for high-budget apartments in the capital have grown by about 20%.

Apartments in historical buildings as well as in new buildings in the Pechersk and Shevchenkovskiy districts are the most popular among tenants.

The most common range of rates in the first half of 2017 was \$500-1,000 per month. This represented 32% of deals for the whole market. In this budget category, the most popular options were one- or two-bedroom apartments in the Shevchenkovsky and Pechersky districts.

The situation in the real estate market is a litmus test for the entire country's economy. Economic growth, the devaluation of the Hryvnia, and the increase in utility bills are actively influencing the Kiev market.

	Studio	1-bedroom	2-bedroom	3-bedroom
Pechersky – downtown district	\$900-1,200	\$1,000-3,000	\$1,300-3,500	\$2,500-6,000
Shevchenkivsky district	\$1,000-1,200	\$1,000-2,000	\$2,000-4,500	\$2,500-8,000
Podolskiy district	\$800-1,200	\$1,000-1,800	\$2,000-3,000	\$3,000-6,000

# **Immigration Overview**

#### • Amendment of rules of work permit issuance

- The employer is obliged to conclude a labour contract with an applicant within 90 days since the work permit application was approved.
- Failure to meet this rule leads to work permit cancellation.
- If the documents supporting the application are insufficient or inadequate, such application will not be considered and notification on it will be provided to an applicant within 3 business days upon application.

#### • New visa rules

- No need to obtain an official invitation from the State Migration Service of Ukraine if applying for short-term business and private visas. Such visas can be issued based on a written request from a host company (resident of Ukraine) and a notarized written request from an individual
- D-visas are issued for multiple entries and are valid for 90 days.
- Visas are processed within 10 business days normally and within 5 business days under speed up option.
- The list of countries whose nationals can obtain a visa at checkpoints on the border for business/tourist purpose is expanded and now includes 33 states.
- Business and tourist travelers can submit an application for a single visa valid up to 30 days electronically.









The real estate rental market in Minsk is remaining stable. It is still favorable for tenants and not very positive for owners.

In early 2017, the rental housing market experienced a significant decline in demand, and this period was not the best for landlords. In the first months of spring, rental rates continued to decline, but in May they consolidated at one level, and demand began to grow. So, in July, in comparison with May, activity by tenants grew by roughly 15%.

The current supply volume is 9% lower than the previous spring. The number of studio apartments has fallen by 12%, one-bedroom apartments - by 9%. And only the supply of two-bedroom apartments has increased - by 14% for the year.

In the future, a change in the rental rate can occur due only to several factors. First, due to sales there will be fewer vacant apartments on the market than the previous year. The second factor may be a big increase in the demand because of students, young professionals, and young families. During the period before the start of the academic year, rental rates may increase by about 10-15%.

However, there are currently no serious economic reasons for an increase in rental prices.

	Studio	1-bedroom	2-bedroom	3-bedroom
Lenina Street	\$450-700	\$550-900	\$800-2,200	\$1,000-2,500
Karl Marx Street	\$500-700	\$600-1,000	\$700-1,800	\$900-2,400
Nezavisimosti Avenue	\$400-700	\$500-900	\$600-1,300	\$800-1,500

# Immigration Overview

#### New visa-free regime

Starting mid-February 2017 the new visa-free regime is introduced for nationals of 80 countries arriving in Belarus via National Airport of Minsk. The allowed period of stay without visa is 5 days.

! The regime does not apply to foreign nationals flying from Russia or planning to take flight from Belarus to Russia.







For the last six months, the situation in the Baku rental market has remained stable. This summer, the rental market has seen some slight activity in rental rates, which have increased by almost 3% since the beginning of the year.

The highest rental rate in Baku was recorded in the Sabail district, at 10,000 Manats or \$5,874 per month (an exclusive four-bedroom apartment with a total area of 530 sq. m.). Apartment servicing costs, as well as utility costs for high-budget apartments are up to approximately \$88 - \$150 per month.

	Studio	1-bedroom	2-bedroom	3-bedroom
Sahil & East Baku district	\$800-1,500	\$1,000-2,000	\$2,000-3,000	\$3,400-5,000
Downtown district	\$800-1,500	\$1,000-1,900	\$2,000-2,800	\$3,300-5,000
North Baku district	\$500-900	\$600-1,700	\$700-2,000	\$800-2,300

### **Key Rental Facts**

Lease term: 1 year

Currency: AZN/USD/EUR

First payment: 3 months up front

Payment schedule: monthly

Security deposit: none or 1 month

Tenant notice period: 1 month

Tax: additional 14 % (corporate leases only)

Utility bills: USD 50–250



# Tbilisi Housing Market



The high-budget rental market in the Georgian capital is in a state of prolonged recession. Despite the fact that rental rates have recently decreased in Tbilisi, they still remain quite high. This fact, in conjunction with a dramatic reduction in income among the population, is leading to a reduction in demand.

Compared to the same period in 2016, the demand for rental apartments fell by 30%. Recently, landlords have started to rent apartments in the national currency, GEL. However even this change has not stimulated demand, because the incomes have decreased significantly, while expenses have dramatically increased. In addition, due to a fall in the value of the GEL (the devaluation of the national currency began in the autumn of 2014 and since then it has depreciated by 55%), the process of increasing costs for imported goods continues and directly affects the real estate market.

Positive economic and political changes will help to bring the real estate market of Tbilisi to a new level.

	Studio	1-bedroom	2-bedroom	3-bedroom
Vake district	\$400-700	\$500-900	\$600-2,000	\$700-2,300
Saburtalo district	\$400-700	\$500-900	\$600-1,900	\$700-2,200
Old Tbilisi district	\$350-700	450-800	\$500-1,800	\$650-2,100

### **Key Rental Facts**





# About us:

24 years in Russia
50 Relocation consultants

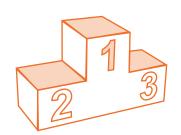
Complete range of Immigration, Relocation and Moving Services: all in-house



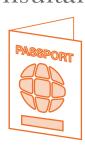
We relocate 70 families per month



1<sup>st</sup> professional relocation consultancy in Russia



Immigration support:
10 immigration consultants



We speak 12 Languages



Representing major Global Relocation companies in Russia, Azerbaijan, Ukraine, Kazakhstan, Belarus and Georgia



Preferred supplier for major multinationals in Russia







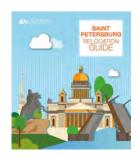
# **Our Materials**

#### Moscow Relocation Guide



Inside this edition of the Intermark Moscow Relocation Guide you will find all the facts of the local housing market and different areas of the city including the most popular residential areas, international schools, medical care and, of course, tips for adapting to Moscow life.

### St. Petersburg Relocation Guide



One of the most beautiful cities in the world, St. Petersburg, has finally gotten its own Intermark Relocation Guide! It turned out to be very attractive, useful, and interesting for newcomers and foreigners, describing St. Pete housing market and practicalities of living in the cultural capital of Russia.

### Regional Guides



In recent years international companies have been actively expanding and relocating their assignees not only to Moscow, but also to other regions of Russia. Intermark Relocation creates guides about other Russian cities to make expat life easier and more interesting across the country.

#### **Relocation Guides**



Intermark helps expats relocate to many countries and we are proud to present our brand new Relocation Guides for Azerbaijan, Belarus and Kazakhstan! These guides with useful information about migration procedures, housing markets, international schools, traditions and culture, sightseeing and tips making expat life interesting and eventful.

### **Immigration Process Flow**



This document visualizes process flows of immigration policy in different countries. It includes step-by-step description of procedures, required steps and their sequence.

### Country Pages



Intermark Relocation is glad to present our new country pages for Armenia, Uzbekistan, Kyrgyzstan and Moldova. Our team created these pages for people relocating to different countries and inside you can find important information about immigration procedures, culture and other useful tips.



\*This map is a simplified picture and may vary from the authentic borders of the presented countries.

### **IMMIGRATION**

- Work Permit
- Visa support (all types)
- Residence Permits
- Migration registration & notifications
- Legalization & duplicates' procurement
- Immigration due diligence

#### **MOVING**

- International moving
- Domestic moving
- Transportations of antiques
- Office moving
- Vehicle moving
- Stock and storage

### **RELOCATION**

- Temporary Housing
- Orientation & Home-finding
- Legal due diligence
- Settling in & 24/7 Help-desk
- Departure Support
- Spousal support & Coaching

#### **AND MORE**

- Office/retail search
- Furniture rental
- Car leasing & Insurance
- HR Workshops
- Language training
- Marketing reports



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