DOI: https://doi.org/10.32782/city-development.2026.3-20
UDC 332.14:351.82

METHODOLOGICAL PRINCIPLES OF STATE POLICY FOR THE ZONAL DEVELOPMENT OF DEPRESSED TERRITORIES

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Summary. The study examines policy for depressed territories facing spatial inequality and demographic decline. It proves the inefficiency of financial equalization, urging the end of subsidies to unlock internal potential. The purpose is integrating smart shrinkage, polycentricity, and functional zoning. Theoretical novelty defines seven spatial management principles (adaptive smart shrinkage, polycentric restructuring, institutional density, disparity management, targeted financing, ecological-economic restoration, and functional zoning). Practical significance classifies territories into seven functional types with specific financing vectors, bypassing rigid templates and administrative borders. Funding must target community-business projects rather than a depressed status. This transforms passive zones into robust economic centers.

Keywords: zonal development, depressed territories, spatial planning, functional areas, smart shrinkage, territorial cohesion, state policy

Relevance of the issue. The ongoing development of global and national economic systems is characterized by a significant intensification of territorial inequality processes, whereby innovation hubs and major cities rapidly concentrate financial, intellectual, and human capital, leaving substantial territories marginalized from economic and social progress. This geographical and socio-economic divergence creates so-called "depressed territories", distinguished by a persistent decline in demographic potential, large-scale industrial downturn, critical obsolescence of core infrastructure, and an irreversible outflow of the most qualified personnel. In the wake of the pandemic and escalating economic crises, the conventional model of state support for such regions relying predominantly on direct fiscal equalization mechanisms and targeted subsidies for loss-making sectors demonstrates profound systemic inefficiency and exhausted capacity. Consequently, when traditional instruments fail to halt the processes of "territorial shrinkage", it entrenches their economic backwardness and widens the social divide, posing a direct threat to national security and the integrity of the state. As a result, an urgent academic and managerial necessity arises to revise the foundations of regional policy, prompting an objective transition toward cutting-edge models of functional zoning and comprehensive spatial integration. Therefore, to build a resilient country, it is essential to implement policy tools capable of both compensating for local fiscal deficits and purposefully unlocking the internal competitive potential of stagnating zones, organically integrating them into the broader network of a renewed national economy.

Analysis of recent research and publications. The issue of overcoming acute regional inefficiency is frequently in the focus of attention of international organizations and domestic experts. At the same time, global experience demonstrates a clear division between general economic and managerial approaches. A significant contribution to the theory of territorial cohesion and polycentric development has been made by experts of the "UN-Habitat" programme, proving the need for collaborative planning and social stability [1, 2]. Concurrently, in reports of the Organisation for Economic Co-operation and Development (OECD), researchers Fadic M., Garcilazo J. E., Moreno-Monroy A. I., Veneri P. described the complex phenomenon of «demographic shrinkage» using spatial metrics. To address this issue, they proposed flexible planning and demographic change management aimed at maintaining the quality of life under conditions of actual population decline [3, 4, 5, 6]. Expanding the understanding of the nature of functional zones was facilitated by European research groups such as "ESPON". Studies within their "ESCAPE" programme, led by Copus A., Dax T., proved the inability of conventional EU financial transfers to ensure genuine equalization for regions that persistently lag behind due to labor force loss [7, 8, 9]. As an alternative, the World Bank proposes a practical solution through close infrastructural con-

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nectivity of lagging territories with neighboring large cities [10]. In domestic scholarship, the study of local governance is addressed in the works of Storonianska I. Z., who, co-authoring with Prokopiuk A., Zalutskyi I. R., describes legal models for transitioning to functional development [11, 12]. The research by Benovska L. Ya. reveals the instruments of this model, demonstrating the benefits of applying the program-targeted financing method [13]. In contrast, Varnalii Z. S., Shevchenko O. V. propose an approach that involves the smart utilization of local disparities as a driver of competitive advantages [14]. Despite this, creating a unified approach that integrates international developments with the genuine specifics of Ukrainian post-war recovery still requires further analysis.

The purpose of the article lies in the comprehensive theoretical and methodological substantiation of modern foundations of state policy for the zonal development of depressed territories through the consistent systematization of scientific approaches to the concepts of "zonal development" and "state policy", the identification of modern principles of spatial governance, as well as the elaboration of a typological classification of depressed territories detailing the corresponding vectors of their recovery.

Research results. To develop an integrated and multifaceted understanding of spatial transformation processes, an objective necessity arises to examine contemporary scientific approaches to defining the concept of "zonal development".

This analysis is carried out to identify key differences in the fundamental perspectives of international institutions and leading foreign and domestic scholars regarding the organization of territorial systems, which serves as the foundation for creating effective regulatory mechanisms.

The conducted analysis of scientific approaches to defining the concept of "zonal development" (Table 1) determines the diversity of interpretative vectors. The approach of "UN-Habitat" experts focuses on global survival imperatives, viewing "zonal development" as a universal instrument for mitigating social crises [1, 2]. In contrast, the OECD methodology, represented by Fadic M., Garcilazo J. E., Moreno-Monroy A. I., Veneri P., is distinguished by pragmatism, drawing attention to population density and migration metrics to delineate actual economic boundaries [3]. Gehl J. concept deepens the understanding to the level of individual perception, demonstrating that macroeconomic planning is ineffective without forming a comfortable zone for

Table 1 – Scientific approaches to defining the concept of "zonal development"

Author / Organization	Characteristics	Vector of analysis
UN-Habitat	Inclusive spatial planning that ensures polycentric urbanization, climate resilience, and equal access to social public goods regardless of the geographic location of the entity	Universal sustainability, poverty alleviation, priority of environmental safety, and equality of opportunity
Fadic M., Garcilazo J. E., Moreno-Monroy A. I., Veneri P. (OECP)	A multilevel system of territorial classification based on population density and commuting flows for the targeted development of agglomerations and rural areas	Deep spatial integration, overcoming administrative fragmentation, and functional interdependence
Gehl J.	The formation of a clearly zoned living environment aimed at preserving the authenticity of urban space and meeting human needs through community engagement	Micro-level human-centricity, preservation of the socio-cultural landscape, and environmental comfort
Torre A., Wallet F.	A decentralized governance process of overcoming unbalanced economic growth by stimulating local innovations in non-urbanized peripheral zones	Institutional capacity of territorial management and the development of innovative development ecosystems
ESPON	A systemic mechanism of territorial cohesion that synchronizes sectoral investment policies with spatial planning to minimize macroeconomic disparities	Strategic coordination of capital investments and mitigation of the negative effects of polarized growth
Camagni R.	A specific set of tangible and intangible assets (territorial capital) that forms the unique development potential of a particular zone	Endogenous potential, spatial synergies, and local identity
Rodríguez-Pose A.	An equitable distribution of economic opportunities to prevent the marginalization of territories and mitigate social tension in declining regions	Overcoming the geography of discontent, social inclusion, and balanced growth

Source: developed by the author based on the conducted research and source [1, 3, 8, 15, 16, 17, 18]

the resident [15]. The theoretical frameworks of Torre A., Wallet F. shift attention to the governance process, asserting that balanced development is achieved through the formation of local institutions [16]. In turn, the European network "ESPON" views "zonal development" as a systemic instrument of territorial cohesion, emphasizing the strategic coordination of capital investments and spatial planning to minimize macroeconomic disparities and mitigate the consequences of polarized growth. Camagni R. concept expands the understanding through "territorial capital", highlighting the unique combination of resources in each location [17]. Concurrently, Rodríguez-Pose A. warns of acute social risks, as ignoring the needs of lagging zones leads to widespread public discontent [18].

Consequently, the presented scientific approaches allow for identifying three key levels of understanding the concept of zonal development. The global-macroeconomic level is revealed by experts from "ESPON" and "UN-Habitat" through the concepts of spatial cohesion and investment coordination. The institutional-resource direction is detailed by representatives of the OECD, Torre A., Wallet F., Camagni R., emphasizing the processes of mobilizing territorial capital and managerial capacity. In contrast, the socio-spatial specificity is investigated by Gehl J. and Rodríguez-Pose A., substantiating the importance of human-centricity, inclusion, and the prevention of marginalization. The provided perspectives prove that modern spatial policy cannot rely exclusively on economic indicators, but must combine the stimulation of growth poles with ensuring social justice and the comfort of the living environment.

Further, for the successful application of public administration methods and the precise identification of targets for financial impact in territories experiencing economic decline, Table 2 systematizes contemporary scientific approaches that substantiate the expediency of stimulating regions' internal resources rather than simply subsidizing them.

The evolution of scientific approaches to defining the concept of «state policy regarding depressed territories» demonstrates a gradual departure from simple social subsidization in favor of the comprehensive stimulation of internal resources and integration. In particular, Varnalii Z. S., Shevchenko O. V. substantiate the necessity of abandoning mechanical equalization for the sake of macroeconomic regulation relying on the rational utilization of the specific characteristics of each location [14]. This thesis is expanded by Storonianska I. Z., Zalutskyi I. R., who prove the systemic failure of traditional sectoral support measures and emphasize the need to establish innovative institutional and legal foundations for

Table 2 – Scientific approaches to defining the concept of "state policy regarding depressed territories"

Author / Organization	Conceptualization of state policy regarding depressed territories	Key regulatory issues
Copus A., Dax T. (ESPON)	Managing the processes of rural demographic shrinkage driven by selective youth out-migration and the weakness of local institutions	Demographic inertia and the necessity of adapting local governance to the realities of population decline
World Bank	Ensuring large-scale investment integration of subregions with urban agglomerations to stimulate economic spillovers	Chronic deficit of market demand, geographic isolation, and insufficient access to sales markets
Benovska L. Ya.	Implementing a program-targeted budgeting model to concentrate financial resources exclusively on priority objectives of smart specialization	Dissipation of funds, dominance of recurrent social expenditures over development projects
Varnalii Z. S., Shevchenko O. V.	Strategic macroeconomic regulation of socio-economic disparities relying on the internal potential of local economies	The necessity of shifting the approach from mechanical equalization to the rational utilization of disparities
Storonianska I. Z., Zalutskyi I. R.	Establishing innovative institutional and legal foundations of regulation that abandon outdated administrative divisions in favor of functional territories	Systemic failure of sectoral support measures and lack of instruments to stimulate cooperation
Cotella G.	Integrating an urban-oriented approach into nationwide cohesion policy to support cities and vulnerable territories	Overcoming geographic isolation through the formation of resilient functional urban networks
European Commission	Targeted funding and human capital development to adapt regions to demographic and technological challenges	Modernization of cohesion policy, enhancing the administrative capacity of territories

Source: developed by the author based on the conducted research and source [7, 10, 12, 13, 14, 19, 20]

managing functional territories instead of outdated administrative units [12]. Such a revision of basic principles makes it possible to construct more adaptive governance models for locations with limited potential. Overcoming geographic isolation and the chronic deficit of market demand on the periphery is viewed predominantly through the prism of network interaction. According to the position of the World Bank, the solution lies in the large-scale investment integration of subregions with urban agglomerations [10]. A similar logic is shared by Cotella G., who accentuates the integration of an urban-oriented approach into nationwide cohesion policy to support vulnerable territories by including them in resilient functional urban networks [19]. Such synchronization of efforts between the core and the periphery creates favorable conditions for introducing public-private partnership instruments capable of generating new jobs and restoring infrastructure amid state budget deficits.

The effectiveness of such spatial integration directly depends on the quality of resource allocation. Benovska L. Ya. criticizes the contemporary practice of dissipating funds and the dominance of recurrent expenditures over development projects, proposing the concentration of finances through a program-targeted budgeting model oriented toward smart specialization [13]. However, even in the presence of funding, recovery is hindered by demographic inertia. ESPON researchers Copus A., Dax T. regard depression as a consequence of rural demographic shrinkage and selective youth out-migration, calling for the adaptation of local institutions to unavoidable population decline [7]. For this reason, the European Commission views the primary priority of modernizing cohesion policy as the targeted development of human capital, which will enhance the administrative capacity of regions and their resilience to technological challenges [20].

The synthesis of these approaches proves a shift of emphasis in public administration. Instead of continuous compensation for losses, the attention of scholars and institutions is focused on identifying endogenous sources of growth. This acquires particular importance in the context of large-scale spatial reconstruction, where the revival of depressed zones requires the creation of eco-industrial parks and the formation of priority development zones as new magnets for capital attraction. Such a combination of innovative ecosystems, smart urbanization, and targeted financing will enable successfully overcoming the structural crisis of lagging territories.

Further, we define modern foundations of state policy in the sphere of zonal development of depressed territories, which determine the complex dependence between the change in the state's territorial structure and governance mechanisms.

The first principle is «Adaptive smart shrinkage», which rejects the idea of infinite growth. It resolves the key problem of acute fiscal incapacity to maintain infrastructure designed for a historical population peak and the presence of surplus housing stock. Under conditions of population decline, any attempts to mechanically restore former demographic indicators yield no results [4, 21, 22]. This methodology requires revising infrastructure through the application of a mechanism for the comprehensive reconfiguration of land use, the mothballing of economically inefficient facilities, and the mobilization of basic social services for the population [4, 23].

The second principle is "Polycentric spatial restructuring". It is directly aimed at overcoming the problem of excessive concentration of financial capital in metropolises, the decline of the rural periphery, and the rapid depletion of resources in intermediate cities. Territories lacking a sufficiently strong center, at least in the form of a medium-sized city, are doomed to resource loss [10, 25]. Therefore, state policy is obliged to stimulate the mechanism of forming resilient networks of secondary cities and active inter-municipal cooperation. Access to state investments should be opened to those depressed territories that have been able to identify their competitive advantages and prove the ability to generate positive spillover effects in cooperation with neighboring zones [12, 14].

The third principle is "Enhancing institutional density". It eliminates the problem of a deep local power vacuum, extremely weak personnel capacity in local self-government, and catastrophic distrust in state initiatives. This is achieved through the mechanism of systematically uniting civil society structures and businesses into dense consortia for budget management.

The fourth principle of an integrated state policy is "Synergetic management of spatial disparities". Its objective lies in resolving the problem of the erroneous perception of territorial inequality exclusively as a threat, which leads to economically unjustified attempts at total financial equalization. The corresponding mechanism of spatial regulation here is the thorough auditing of unique regional assets and the stimulation of niche smart clusters.

The fifth principle applied to ensure the stability of these processes is "Program-targeted financing". It allows overcoming the problem of chronic underfunding of development projects, non-targeted dissipation of funds, and the lack of alignment between budgets and long-term strategies. This approach operates through the mechanism of strictly linking regional development funds with performance audits of initiatives.

The sixth critically necessary principle is "Comprehensive ecological and economic restoration". It is designed to eliminate the problem of extensive

abandoned industrial areas, dangerous environmental risk zones, and fully degraded old-industrial urban landscapes. Its mechanism ensures the transformation of decommissioned industrial facilities into modern recreational or innovation parks with the broad application of green technologies.

The seventh principle of managing depressed territories is "Functional economic zoning of space". It abolishes the problem of the dominance of an outdated sectoral approach that fails to account for the specificities of different types of territories and their actual spatial interaction. The mechanism of this principle implements a transition from rigid administrative divisions to delineating policy boundaries based on actual socio-economic linkages and commuting flows.

Since the practical recovery of space requires selecting distinct instruments for each specific case, Table 3 presents a classification of depressed territories, which facilitates identifying flexible vectors of investment and regulation for diverse functional zones.

The data in Table 3 indicate that providing identical financial assistance to all territories is an erroneous strategy. Thus, in old-industrial single-industry cities, the main barrier to development is mass unemployment resulting from the liquidation of the core enterprise and the weak development of the local economy. To overcome this crisis, investments should be directed toward active brownfield redevelopment, the establishment of industrial parks, and workforce reskilling [26]. While industrial centers require production restructuring, remote shrinking rural territories [5] demand an entirely different form of support. In these regions, development is hindered by population aging, the absence of economic infrastructure, and the disruption of supply routes to markets. Accordingly, the primary solution here becomes the support of community-led local development initiatives, investigated in detail in the works of Saracu A. F., Trif N. V. [24], which must be accompanied by the deployment of mobile services and the development of modern farming and agritourism.

A similar problem of significant distance is characteristic of peripheral and border-isolated zones. However, they additionally suffer from the severance of international connections, the absence of direct linkage to decision-making centers, and barriers to mobility. Resolving these specific issues will be

Table 3 – Classification of depressed territories and vectors of recovery

Functional type of depressed territory	Main barrier to development	Direction of regulation and investment
Old-industrial single-industry cities (monotowns)	Structural unemployment due to the liquidation of the main enterprise, low diversification of the local economy	Active brownfield redevelopment, establishment of industrial parks, and workforce reskilling programs
Remote shrinking rural territories	Population aging, lack of economic infrastructure, disruption of logistical routes to markets	Support for local development initiatives, deployment of mobile services, and development of modern farming and agritourism
Peripheral and border-isolated zones	Severance of international connections, detachment from decision-making centers, barriers to mobility	Attraction of European cooperation funds and development of customs and logistics infrastructure
Transit-logistics dead ends and marginal transport hubs	Loss of transit potential due to the reconfiguration of major routes, decline of service infrastructure	Repurposing infrastructure into local logistics hubs for e-commerce or data centers
Areas of environmental decline and man-made (technogenic) pollution	Impossibility of conducting traditional economic activities due to pollution, high morbidity rates among the population	Large-scale environmental remediation of territories and stimulation of renewable energy projects on degraded lands
Suburbanized donor areas and "dormitory" districts	Operation of the territory exclusively as a labor source for a large city without retaining local revenue	Stimulating the development of local workspaces (coworking spaces), microbusiness support, and legal retention of a portion of local taxes
Agglomeration shadow zones	Resource outflow into a neighboring strong center, leaving the territory in a state of stagnation despite geographic proximity	Integration into the agglomeration transport model on the basis of mutually beneficial cooperation and development of highly specialized services for the central core

Source: formulated independently by the author

facilitated by attracting European cooperation funds and developing customs and logistics infrastructure. The reconfiguration of supply chains also impacts transit-logistics dead ends and marginal transport hubs. They lose their potential due to the alteration of major routes and the decline of service infrastructure. The optimal path for their recovery is repurposing the existing infrastructure into local logistics hubs for e-commerce or data centers. Alongside infrastructural challenges, there are territories where economic activity is physically constrained. Specifically, in areas of environmental decline and technogenic pollution, the impossibility of conducting conventional activities due to contamination and high morbidity rates among the population necessitates large-scale environmental remediation of territories and the stimulation of renewable energy projects on degraded lands.

A distinct category is comprised of regions that lose their own resources to neighbors. Thus, suburban donor areas and "dormitory" districts operate exclusively as a labor source for a large city without retaining local revenue. In light of this, funds should be allocated toward stimulating the development of local workspaces, supporting microbusinesses, and legally retaining a portion of local taxes. An identical situation arises in agglomeration shadow zones. Here, an outflow of resources to a neighboring strong center also occurs, leaving the territory in a state of stagnation despite geographic proximity [4]. Under such conditions, rather than competing, it is preferable to integrate into the agglomeration transport model on the basis of mutually beneficial cooperation and develop highly specialized services for the central core [10, 19].

Such a diversity of barriers and required solutions proves that the vector of state support must be flexible, taking into account the existing potential of a specific territory.

Conclusions. The study demonstrates that the traditional model of state regional policy has exhausted its capacity regarding the development of depressed territories. Reliance on a sectoral approach and the fiscal equalization of budgets has lost its effectiveness under conditions of deindustrialization, spatial isolation, and migration crises. It is precisely these factors that necessitate a radical shift in governance approaches, which must now rely on the integration of spatial planning, budgetary smart specialization, and flexible functional zoning. To transform these theoretical foundations into an effective mechanism, the first step must be the modernization of spatial organization. In view of this, it is expedient to legally codify the abandonment of investment planning based on administrative borders. Governance must operate with functional types of territories, which requires the implementation of a national metric for assessing spatial linkages. Regular monitoring of commuting flows and the analysis of economic transaction density will allow for the identification of the geographic boundaries of depressed zones. Such an approach will enable the application of unique investment vectors for each location according to the developed classification, rather than using uniform financial templates. Having determined the actual boundaries of territories, the state must adapt strategies to their factual demographic state. In particular, for locations experiencing persistent depopulation, the implementation of the "smart shrinkage" doctrine is necessary. Spatial policy must shift its focus from attempts to artificially restore population numbers toward ensuring the quality of life for residents through the deployment of digital and mobile infrastructure. This process must be accompanied by a spatial restructuring policy that stimulates the integration of remote communities and shadow zones into cooperation networks centered around secondary cities. However, the practical implementation of such spatial transformations objectively requires the renewal of financial support mechanisms. For this reason, the system of criteria for accessing the funds of the State Fund for Regional Development and external donor facilities requires a deep reformatting. Budgetary funding must be provided not for the status of "depression", but for elaborated community recovery projects. They must substantiate their capacity to generate value chains, develop human capital, and ensure the ecological conversion of old-industrial brownfield sites. To ensure the implementation of such projects, it is necessary to build institutional density locally by engaging business and civil society representatives in budget management. Only the comprehensive application of these instruments will provide the desired macroeconomic effect. Ultimately, the consistent implementation of these vectors will allow transforming "depressed territories" from passive consumers of public funds into autonomous and strong economic centers.

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МЕТОДОЛОГІЧНІ ЗАСАДИ ДЕРЖАВНОЇ ПОЛІТИКИ ЗОНАЛЬНОГО РОЗВИТКУ ДЕПРЕСИВНИХ ТЕРИТОРІЙ

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Анотація. У роботі досліджено теоретико-методологічні засади державної політики зонального розвитку депресивних територій в умовах просторової нерівності та демографічного спаду. Актуалізовано проблематику вичерпаності традиційної моделі регіонального управління, яка спиралася на спроби фінансового вирівнювання бюджетів та домінування застарілого галузевого підходу. Обґрунтовано необхідність відмови від класичних дотаційних інструментів на користь стратегій стимулювання внутрішнього потенціалу територій. Мета дослідження спрямовано на теоретико-методологічне обґрунтування засад зонального розвитку шляхом поєднання концепцій розумного стиснення, поліцентричності та функціонального зонування. Аналіз поглядів провідних міжнародних інституцій та вітчизняних експертів засвідчив, що сучасна просторова політика вимагає інвестиційної інтеграції та адаптації місцевого управління до реалій скорочення населення та факторів військового часу. Теоретичну новизна полягає у виділенні семи методологічних принципів управління просторовими змінами, серед яких адаптивне розумне стиснення, поліцентрична реструктуризація, нарощування інституційної щільності, синергетичне управління диспропорціями та еколого-економічна комплексна відновлення. Практична значущість представлена у розробці типологічної класифікації депресивних територій, яка категоризує просторові одиниці на сім функціональних типів із деталізацією векторів фінансового регулювання для кожного з них. Доведено, що запровадження такої класифікації дозволяє відійти від однакових фінансових шаблонів та управління за адміністративними кордонами. Обґрунтовано, що доступ до державного фінансування має надаватися не за формальний статус «депресивності», а виключно під розроблені громадські проєкти відновлення. Для успішної реалізації цих ініціатив наголошено на необхідності залучення представників місцевого бізнесу та громадянського суспільства до безпосереднього управління бюджетами. Результати роботи представляють вагомий внесок у вдосконалення практики публічного управління, пропонуючи вектори трансформації депресивних територій з пасивних споживачів державних коштів у самостійні та сильні економічні центри.

Ключові слова: зональний розвиток, депресивні території, просторове планування, функціональні території, розумне стиснення, територіальна згуртованість, державна політика.

Дата надходження статті: 19.08.2026
Дата прийняття статті до публікації: 16.09.2026
Дата публікації статті: 03.11.2026