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Strategic planning for local development in Poland

This chapter reviews the practice of strategic planning for local development in Poland's local self-government units (LSGUs). It begins with a discussion on the importance of strategic planning for the Polish local context. It then moves on to explain the challenges and opportunities in the elaboration of local development strategies (LDS). It makes special emphasis on the practical and structural challenges LSGUs, in particular municipalities, face when elaborating LDS. The chapter then discusses the management aspects of planning, such as financing, public consultations and monitoring. It ends with a series of policy and practical recommendations to improve LSGU capacity and processes to plan development strategically.

Introduction

For the last three decades, Poland has been tackling strategic challenges (i.e. adequate housing, efficient urban transport, environmental protection, economic development) to ensure optimal development of its voivodeships and local self-government units (LSGUs) (counties and municipalities). Government authorities at all levels have long been striving to: better use the potential of urban areas to generate growth; prevent excessive spatial differences; foster innovation; prevent negative demographic trends; adapt to climate change; protect and use rationally environmental resources; use the tourist and cultural potential of regions and cities; support competitiveness through transport and information and communication technology (ICT) infrastructure; and enhance institutional capabilities to manage development. However, Poland has been struggling to meet these objectives due to regulatory, capacity, financial, institutional and organisational constraints at the local level. The COVID-19 pandemic has made it more challenging as it has created uncertainty in development prospects as it has further crippled the already limited capacities and resources of local government, which are at the frontline of the recovery efforts. The COVID-19 pandemic is leading Poland and the other OECD countries to rethink local development, its importance and priorities. In this context, Poland requires improving its capacity for strategic planning at the local level to guide decision-making and make better use of available resources. Most voivodeships and LSGUs have a strategic document intended to guide investment for social and economic development, which is prepared depending on local needs. However, the lack of updated, reliable data and mechanisms for monitoring and evaluation (M&E), as well as the unsophisticated mechanisms for stakeholder involvement in community issues make strategic planning less effective. This situation is expected to change with the reforms to the Act on Principles of Implementation of Development Policy as it provides clearer guidelines on how LSGUs could plan better local development.

Poland's LSGUs can benefit from strategic planning in a number of ways. First, strategic planning allows local administrations to be proactive rather than reactive, to foresee the future and prepare accordingly. It can help LSGUs to set up a sense of direction and contribute to establishing realistic objectives and goals in line with a vision and mission. It can also assist LSGUs in improving their operational efficiency by aligning the government's activities to achieve the selected goals. In addition, in the aftermath of COVID-19, strategic planning can provide a strong foundation for sustainable development, focus and foresight to build back better.

The aim of this chapter is to assess the state of strategic planning in Poland's subnational governments, reflected in the elaboration of the LDS. The chapter will provide recommendations on how the process of plan-making can be improved. The chapter presents an overview of the relevance of strategic planning for Poland and its self-governments, particularly in the context of the COVID-19 pandemic. It then discusses the practical and structural challenges LSGUs face in the elaboration of their LDS. The chapter then moves on to a discussion of the management aspects of local development planning such as implementation, public engagement and monitoring. It ends with a series of recommendations on how to improve the practice of and improve LSGU capacities for strategic planning for local development. The chapter is based on a literature review that included the consultation of several LDS, the results of the 2020 OECD questionnaire on "Better Governance, Planning and Services in Local Self-Governments in Poland" and four fact-finding missions to interview a large number of national, regional self-government and LSGU actors, as well as multiple stakeholders from the private sector and civil society organisations.

The case for fostering strategic planning in Poland

Poland's LSGUs and COVID-19

Before the COVID-19 pandemic, Poland's economic development prospects were promising. Its economic growth was strongly underpinned by rising social transfers and a booming labour market with the

unemployment rate at a record low (6.2%) (OECD, 2018^[1]). Poverty and income inequality had fallen and family benefits contributed to bringing down child poverty further. Family benefits were also expected to contribute to raising fertility rates as Poland has an ageing population. However, in Poland, like all across the world, the COVID-19 pandemic has created high uncertainty with unprecedented negative social and economic implications. It has reinforced long-lasting weaknesses in socio-economic development models such as inequality and will certainly have a negative impact on the most vulnerable groups of the population. Lower revenues for LSGUs, fewer employment opportunities, safety concerns, aggravation of social inequality, the possibility of urban expansion and a growing need for better housing and mobility are just some of the consequences of the current crisis. According to OECD estimates, in 2020, Poland's gross domestic product (GDP) growth fell 3.5% but it is projected to grow by 2.9% in 2021 and 3.8% in 2022.¹ Although the COVID-19 pandemic is affecting every region in the country in a different way, it will likely lead to lower levels of well-being and rising unemployment, poverty and inequality.

In this context, local responses are more relevant than ever to advance national economic recovery. Regional self-governments and LSGUs are well-positioned to address the specific implications of firm closures and job losses in their own particular labour markets. They are on the frontline to support the most disadvantaged populations and address their multiple needs. They will need to work closely with small- and medium-sized enterprises (SMEs) to improve the quality of the local and regional labour market as well as with citizens to make strategic decisions on where to invest the available resources – however limited – to meet their common needs.

The COVID-19 pandemic is poised to change the game for local development in Poland. LSGUs' task is to shape a strategy to foster resilience in the wake of the COVID-19 crisis. However, not all regional self-governments and LSGUs are equally equipped to respond to the challenge. They have different policy competencies as well as financial and technical capacity (OECD, 2020^[2]). Moreover, the COVID-19 crisis has had asymmetrical impacts across territories even within the same country but many policy responses were place-blind and uniform. This has highlighted the need for place-based and people-centred approaches (OECD, 2020^[3]). Poland's regional self-governments and LSGUs will have to continue to implement national development strategies in addition to policies in response to COVID-19, but will have to complement them with locally tailored responses for the short and long terms.

Strengthening regional self-governments and LSGUs' capacity for strategic local development planning is of the utmost importance to provide a coherent policy approach to the national challenges to come while targeting specific community needs. The creation of an integrated and co-ordinated development planning system across levels of government that is strongly linked with budget planning is essential not only for the competitiveness of the national economy and the strengthening of LSGUs in development planning but also as an effective response to the current socio-economic downturn brought about by the COVID-19 crisis.

In Poland, regional self-governments and LSGUs will have to adapt in the medium and long terms to trends that are already underway and accelerating such as digital transition and automation. The rise in teleworking within cities may lead local development strategies (LDS) to bridge the digital divide. Before COVID-19, in Poland, 30% of the working population used teleworking occasionally depending on the nature of their job (OECD, 2020^[4]). People able to work remotely may be eager to move to areas that offer a higher quality of life and lower costs. This, on the one hand, could put pressure on some communities to be prepared to absorb new residents and increased demand for services (i.e. schools, health centres, Internet connectivity, infrastructure, public transport). On the other hand, large metropolitan areas may experience relief from pressure linked to housing prices and commuting. Temporary emergency restrictions on international movements of people within the European Union (EU) could translate into long-term isolationism. The problem is that many communities in Poland rely on remittances from Polish migrant workers who settled in more affluent European countries and support their families back at home.² Thus, new job opportunities will need to be found and LSGUs will have to invest in local training and education in case borders close completely or immigration rules become more restrictive in the future.

A national framework for local strategic planning

In 2017, Poland adopted the *Strategy for Responsible Development for the period up to 2020 (including the perspective up to 2030)* (SRD) (Box 3.1) that constitutes the national planning policy framework. It sets out the government's planning policies for medium- and long-term economic development and how these are expected to be applied and serves as a reference for LDS. The SRD sets the basic conditions, objectives and directions for the country's development in social, economic, environmental and spatial terms. When LSGUs prepare their LDS, they must take into account SRD policy orientations and adapt them to the local needs and specific development priorities. The SRD specifies the institutions responsible for implementation; it sets implementation indicators and specific programmes for execution.

Box 3.1. The Strategy for Responsible Development – A new model of development for Poland

The *Strategy for Responsible Development for the Period up to 2020 (including the perspective up to 2030)* (SRD) specifies the development goals to be achieved by 2020 and 2030 and the way they should be achieved. It presents a new model of development that seeks to be “responsible” (i.e. meets the needs of the present without compromising the ability of future generations to meet their own needs) as well as socially and territorially sustainable. The SRD's main objective is to create the conditions for raising the income of citizens along with increasing social, economic, environmental and territorial cohesion to achieve inclusive social and economic development.

The SRD comprises three specific objectives:

1. **Sustainable economic growth increasingly driven by knowledge, data and organisational excellence.** This refers to re-industrialisation, increasing innovation, enhanced SMEs, capital growth and foreign expansion of Polish enterprises.
2. **Socially sensitive and territorially sustainable development.** This refers to stronger social cohesion and strengthening regions struggling with difficulties.
3. **Effective state and economic institutions contributing to growth as well as social and economic inclusion.** This refers to laws at the service of citizens and the economy, effective public institutions available and open to citizens and entrepreneurs, the achievement of stable, effective and sustainable public finance, and the efficiency in the use of European Union (EU) funds.

The SRD seeks to address economic and social development challenges such as demographic changes, processes of global and regional integration, climate change, intensifying competition for resources across regions, and the need to boost innovation in LSGUs. It recognises critical institutional challenges such as national government procedures that maintain rigid control over the actions of subnational governments, excessive reliance on EU funds and EU programmes to define public policies, operation in silos and overlapping responsibility of government agencies. As part of the SRD, between 2017 and 2020, the national government expects to invest PLN 2 billion (approximately USD 500 million) in pro-development expenditure, of which PLN 1.5 billion will be public resources and the rest private investment.

Source: Polish Government (2017^[5]), *The Strategy for Responsible Development for the period up to 2020*, <http://www.gov.pl> (accessed on 14 December 2020) OECD (2018^[11]), *OECD Economic Surveys: Poland 2018*, <https://doi.org/10.1787/1999060x>.

Research suggests that if Poland is to meet the targets of the SRD, the Polish economy needs to grow at an estimated rate of about 5%-7% of GDP and increase its expenditure in research and development (R&D) at least 1% point of GDP (Oleksiuk, 2017^[6]). However, Poland's economic activity has had its ups and downs in recent years, passing from 3.8% growth in 2015 to 4.6% in 2017 and deaccelerating in 2019 to 3.7% (OECD, 2018^[11]). Similarly, investment in R&D has already fallen to below 1% of GDP (Oleksiuk, 2017^[6]). Moreover, the Polish economy is strongly integrated with those of EU member states and its development largely depends on the way the EU economy copes with megatrends: ageing population, digitalisation, climate change, global and regional integration, and more recently the COVID-19 crisis.

The COVID-19 pandemic risks creating setbacks in the attainment of SRD goals due to the likely reduction of domestic economic activity and internal resource mobilisation. This will probably increase dependence on external sources of funding. How deeply the EU is affected by the crisis and how it responds will likely have an impact on Poland's recovery. In addition, the success of the SRD depends on the co-operation, partnership and shared responsibility of public entities, businesses and citizens, as well as the social sector in the implementation of the public policies. Poland will require an integrated approach to management organised around strategic objectives and co-ordination of sectors and territorial differentiation.

An important step in the modernisation of the planning framework for development has been the reforms to the Act on Principles of Implementation of Development Policy. These amendments introduce a new scheme of sociological, economic and spatial planning for local development. They seek to strengthen the elaboration, implementation and monitoring of the LDS and the co-ordination and collaboration across levels of government for this purpose. Box 3.2 presents the main changes to the act.

Box 3.2. Amendments to the Act on Principles of Implementation of Development Policy

On 15 July 2020, Poland's parliament passed a number of amendments to the Act on Principles of Implementation of Development Policy. Changes include:

- The introduction of the notion of LDS: although the adoption of an LDS is not compulsory, the act considers it a valuable strategic document, which will eventually become obligatory.
- The adoption of a Medium-term National Development Strategy (10-15 years) that specifies basic conditions, goals and directions of the country's development in the social, economic and spatial dimensions, and detailed activities for a period of 4 years.
- The adoption of a territorial agreement that should specify priority projects for the development of the area covered by the agreement. Municipalities can sign agreements with the self-government of the region or a national ministry and it has statutory power.
- The requirement that the spatial planning document and the socio-economic development diagnostic need to be included in the LDS to ensure stronger relations between the two policy documents as in the past they were separated and not fully co-ordinated.
- A detailed process for the elaboration of a development strategy at the voivodeship, supra-local and municipal levels.
- A detailed process for consultation across levels of government for the elaboration of the LDS. A municipal LDS needs to be submitted to the voivodeship board to ensure alignment with the voivodeship development and spatial policy, and in this case with the supra-local development strategy.
- The possibility for neighbouring municipalities to develop a supra-local development strategy which will be a common document for all municipalities involved. Municipalities may be from the same or different counties taking a more functional approach to planning.

- A list of what the LDS must include: i) the conclusions of the socio-economic diagnosis; ii) the strategic social, economic and spatial development goals; iii) an implementation strategy; iv) expected results; v) a model of the functional and spatial structure of the municipality; vi) measures for shaping spatial policy; vii) areas of intervention specified in the voivodeship development strategy; and viii) a financial framework and sources of financing.

The amendments come into force on 13 November 2020.³

Source: Based on information provided by the Polish Association of Cities.

The effectiveness of the Polish planning system for local development will be reinforced with the implementation of the Act on Principles of Implementation of Development Policy. The amendments to the act intend to provide a new approach to strategic planning at the local level as well as the basis for a more coherent elaboration process of the LDS. They could potentially increase the technical and evidence-based quality of the socio-economic diagnosis spatial plans and, in general, the LDS document. The SRD and the act aim to improve the quality of development management and the ability of LSGUs to enter into partnerships, dialogue and co-operation. These changes seem to be in line with international practice as they are comparable to the OECD Principles on Urban Policy (Table 3.1). If the objectives of the changes to the act are met, Poland may be on the right course to build an integrated system of socio-economic and spatial development planning. The key issue now is how this revised version of the act will be implemented. The discussion below shows that not all LSGUs (counties and municipalities) have the same level of capacity and capability to conduct strategic planning and they face different constraints to do so.

Table 3.1. Comparing key feature of the Polish planning system and the OECD Principles on Urban Policy

New features of the Polish planning system	OECD Principles on Urban Policy
Adoption of a national Medium-term National Development Strategy that sets goals, directions and conditions for socio-economic and spatial development for a 10-15 year period.	Principle 4: Set a clear vision for national urban policy that is fit for the future.
Strategic planning can take place at the municipal, supra-local (several municipalities) and regional levels.	Principle 2: Adapt policy action to the place where people live and work, by adapting development strategies and public service delivery to the diversity of urban scales.
Elaboration of a diagnostic of the social, economic and spatial situation of the territory taking into account functional urban areas (FUAs).	Principle 4: Set a clear vision for national urban policy that is fit for the future, by assessing and addressing the impact of globalisation, urbanisation, ageing, migration, population growth and decline, digitalisation, climate change. Principle 11: Foster monitoring evaluation and accountability of urban governance and policy outcomes, by leveraging the potential of data [...] to ground urban policy decisions.
Introduction of the concept of supra-LDS, which includes strategies for FUAs.	Principle 2: Adapt policy action to the place where people live and work, by: i) adapting development strategies and public service delivery to the diversity of urban scales; ii) promoting flexible and collaborative territorial governance and policy beyond administrative perimeters.
Inclusion of a spatial development strategy in the LDS.	Principle 7: Foster a national and multi-level urban approach that sets incentives to align and integrate sectoral policies to jointly promote development and well-being in cities, by promoting effective land use policies [...] to reduce socio-spatial segregation and enhance urban regeneration.
Inclusion of a financial framework and sources of financing within the LDS.	Principle 8: Harness adequate funding for effective implementation of responsibilities for urban policy at all levels of government, by promoting a diversified, balanced and sustainable basket of resources to adequately finance urban development, infrastructure and services across levels of government.

New features of the Polish planning system	OECD Principles on Urban Policy
Provision of guidance for a procedure to consult with stakeholders (citizens, private sector and voluntary sector).	Principle 9: Promote stakeholder engagement in the design and implementation of urban policy, by involving all segments of society, harnessing innovative mechanisms to engage with the private sector and promoting outcome-oriented engagement.
Specification of the expected results of the planned activities and indicators for performance evaluation must be included in the LDS.	Principle 11. Foster monitoring evaluation and accountability of urban governance and policy outcomes, M&E tools; and developing a sound system of indicators to assess and benchmark progress.

Source: Own elaboration based on the reforms to the Act on Principles of Implementation of Development Policy. Act of Parliament, 15 July 2020 and OECD (2019^[7]), *OECD Principles on Urban Policy*, <https://www.oecd.org/cfe/urban-principles.htm> (accessed on 16 March 2020).

The planning of local development

For Poland, like for other OECD countries, strategic planning is a tool to strengthen the socio-economic development of LSGUs in a more inclusive and sustainable manner. It is a means to protect significant aspects of the natural and built environment, guide the efficient and effective use and distribution of resources at the local level, and guide the delivery of essential infrastructure.

To have a basis for planning decisions, Polish LSGUs adopt and implement an LDS, normally with the participation of a wide diversity of stakeholders. An LDS is a coherent set of operations aimed to meet local socio-economic needs and raise the level of well-being. The LDS states where the LSGU is now, where it wants to get to and how it plans to get there. It normally identifies what the development gaps are and what can be done to overcome them in the medium and long terms. It seeks to ensure that the funding available and spending conform to a clear strategy that responds to the strengths, weaknesses, opportunities and threats of the local area. The LDS must be in line with regional development strategies (RDS) and, subsequently, the RDS must be in keeping with national development objectives. It assists local authorities in the management of growth and development in a sustainable manner so that communities can benefit socially, economically and culturally while safeguarding resources for future generations. At the regional level, the RDS are the macro-instrument setting the vision for development of the whole region, taking into account specificities and challenges of the counties and municipalities within the territory.

According to the answers to the OECD questionnaire on “Better governance, planning and services in local self-governments in Poland” (hereafter the OECD questionnaire) conducted in 2020 for this study, 95.5% of municipalities and 90% of counties reported having an LDS. Although national legislation does not make it compulsory for LSGUs to adopt an LDS, this high percentage is most probably due, on the one hand, to the willingness of LSGUs to underline their local identity, profile and specificity and, on the other, to facilitate access to funds for investment in development projects such as EU funds. When local governments apply for EU funds, they must demonstrate a close link between the activities for which they apply and the LDS. This requirement has likely contributed to improving the capacity of subnational development planning in Poland because to access the EU funds demands multi-annual programming that takes into account economic, social and territorial characteristics.

The creation of the different levels of subnational self-governments – voivodeships, counties and municipalities – has also influenced the planning tradition, with the municipal level as the main actors in local planning. Although every level of subnational government has to prepare different plans depending on its responsibilities, some of the plans are characteristic for all three levels of self-government units, such as socio-economic development strategy, budget, a long-term investment programme, a waste management plan, an environment protection plan, a promotion plan, a public safety plan, an ecological education plan, a programme of co-operation with non-governmental organisations (NGOs) and entities engaged in public utility activities (Table 3.2).

Table 3.2. Different plans and programmes and main responsibilities of subnational levels of government in Poland

Subnational government	Specific plans and programmes	Main responsibilities
Regional	Innovation strategy, social integration strategy, healthcare plan, regional spatial management plan, water retention programme, programme for farming and food sector development, strategy for rural areas development, regional operation plan, regional employment action plan and regional power engineering strategy.	Public education, including university education, modernisation of rural areas, water management, including protection against floods, public transport and roads, public safety, related to enhancing economic activity as well as increasing the level of regional economic competitiveness and inventiveness.
County	Local development, programmes for the development of entrepreneurship, programmes for counteracting unemployment, as well as programmes for the benefit of the disabled.	Land surveying, cartography, cadastre, architectural and construction administration, counteracting unemployment and stimulating the local job market, consumer rights protection, public education at secondary and vocational levels, and provision of support for the disabled.
Municipality	The LDS, study of conditions and directions for spatial management, local spatial development plan, revitalisation programme (usually referring to part of a town), plan for the spatial arrangement of farming areas, education development programme, local economic policy programme guidelines for heat supply, power supply and gas fuel supply plan.	Water supply, sewage system, sewage waste disposal and treatment, landfill sites management and communal waste disposal, provision of kindergarten care and primary level education, sports and tourism, communal green areas and spatial planning.

The Polish planning system is made up of a combination of strategic development documents at the national, regional and local levels (Figure 3.1). They are complemented by other specific documents that provide the financial and spatial dimension of development. The challenge is to ensure close co-ordination of these documents. In fact, this has been one of the objectives of the reforms to the Act on Principles of Implementation of Development Policy as it demands that the socio-economic diagnostic and the spatial development plan be integrated into the LDS. At the national level, the Medium-term National Development Strategy replaced the National Spatial Development Concept in November 2020 as it includes some spatial development elements, not included in the RDS.⁴

Figure 3.1. Poland's planning system

		Financial dimension	Spatial development
National level	Strategy for Responsible Development 2020 Medium-term National Development Strategy National Strategy for Regional Development 2010-20: Regions, Cities, Rural Areas Other integrated sectoral strategies	Long-term state budget Financial plan National operational programmes	National Spatial Development Concept 2030 (valid only until 13 November 2020) Medium-term National Development Strategy (valid from 13 November 2020)
Regional level	Voivodeship Development Strategy Development strategies/programmes/plans, including sectoral	Regional operational programmes Long-term voivodeship financing forecast	Voivodeship Spatial Development Plan
Local level	Local development strategies (LDS) Functional area strategies	Long-term financial forecast	Local Spatial Development Plans

Source: Author's own elaboration based on Podlaskie Voivodeship (2013^[8]), *Podlaskie Voivodeship Development Strategy 2020*, <https://strategia.wrotapodlasia.pl>; p. 61.

However, parallel and disconnected measures in the Polish planning system limit its effectiveness as, until recently, co-ordination was mostly on a voluntary basis. LDS are vertically integrated as in theory relations across levels of government seem to work relatively well. However, according to the OECD questionnaire for over 50% of municipalities, there is policy misalignment among national, regional and local development strategies, even though inter-municipal co-operation is foreseen in the Municipal Self-Government Act of 1990 (see Chapter 6). This leaves room for gaps and the need for greater co-ordination and coherence. According to OECD research (2016^[9]), certain elements of the Polish planning system are inconsistent, leading to suboptimal outcomes. Some of those include: the special infrastructural acts of the national government, which are overused and suspend local planning law; areas without local spatial development plans which are subject to one-off planning decisions; and special economic zones which are not linked to local spatial objectives (OECD, 2016^[9]). When adopted, adherence to the LDS is lax. Some municipalities such as Krotoszyn regard the LDS as a guideline on which direction the municipality should take but projects not considered in the strategy can also be conducted. Moreover, municipalities only dispose of a long-term financial forecast for the implementation of the LDS.

Designing the LDS

In Poland, the process of elaborating an LDS varies across LSGUs (Box 3.3). There is no right way or method for designing an LDS as it has to fit the specific local administrative, institutional and political system and financial situation of the locality. This situation may change once the amendments to the Act on Principles of Implementation of Development Policy come into force. However, the elaboration of the LDS requires technical expertise, political commitment and funding, which represent important challenges for many Polish LSGUs. According to the OECD questionnaire, in almost 80% of the municipalities and 90% of counties, the local authority prepares the LDS with the assistance of external consultants. The advantage is that, on some occasions, this raises the quality of strategic documents and helps build technical capacity within the local administration.

Box 3.3. The making of LDS in Poland – Examples

The experience of the municipality of Krotoszyn

In 2018, the municipality of Krotoszyn, in the Greater Poland Voivodeship, had a population of almost 30 000 inhabitants and covers 29 villages. Its annual budget stands around EUR 45-50 million. In 2016, the local authority started the elaboration process of the “Local Development Strategy (LDS) until 2020+”, which took six months to complete. The LDS includes three main areas: entrepreneurship, environment and social matters, which were selected because relevant to the entire functional area. The University of Economics of Poznań, at the request of the municipality, analysed development strategies documents from local, regional and national levels of government. The aim was to ensure coherence between local, regional and national development goals. Based on this analysis, experts of the university provided a diagnosis of priorities and scope of the three different dimensions. Once the diagnosis was completed, a consultation process began involving different stakeholders: experts, consultants, public managers and citizens. A number of meetings were organised that included a prospective discussion: what the municipality will look like in 2020 and beyond. Based on the discussions, a group of university consultants developed recommendations on how to overcome the challenges the municipality would face to achieve the agreed objectives. The consultants then assigned responsibilities to the different units in the local administration. Finally, the LDS was presented to the

city council for approval and implementation. The municipality still has to make the decision of updating the current strategy or elaborating a new one with a new timeline.

The experience of Łańcut county

The county of Łańcut, in the Podkarpackie Voivodeship, had a population of 81 000 inhabitants in 2018. With a population of 18 000 inhabitants, the municipality of Łańcut is the largest city in the county. Forty-three percent of the county's population work in the agriculture sector. In 2015, the county authorities started works for the elaboration of the county's "Local Development Strategy until 2020". It was prepared on the basis of the county needs detected and the need to implement projects financed by the EU. Since there is no inhouse capacity within the administration, the county requested support from the School of Management for the elaboration of the LDS. The works were divided into stages and conducted via workshops and employee councils. Different organisations involved in the work of the county took part in the workshops where they discussed county strengths and weaknesses and brainstormed on proposals for development. With the input gathered through the workshops, the county authorities prepared a draft LDS for the online consultation of citizens and municipalities in the county. For 30 days, county residents and municipalities had the opportunity to provide comments but only a handful of the latter provided feedback. The revised version of the LDS was submitted to the county council for approval and implementation.

The experience of the municipality of Katowice

The municipality of Katowice, in the Silesian Voivodeship, had a population of 295 000 inhabitants in 2018. It has the level of a metropolitan city in terms of number of inhabitants and is the capital of the voivodeship. It has an annual revenue of EUR 2.3 million of which 10% comes from property income. In 2015, the local authorities adopted the "City Development Strategy: Katowice 2030". The strategy focuses on four fields: quality of life, metropolitan nature, entrepreneurship and economic growth, and transport and city logistics. The aim is to make Katowice a smart, innovative, integrated and internationalised city. The strategy is in line with the regional strategic planning "ŚLĄSKIE 2020+ Silesian Voivodeship", the Development Strategy and the "Integrated Territorial Investment Strategy of the Central Subregion of the Silesian Voivodeship for the years 2014-2020". For its elaboration, city authorities set up a steering committee that included members of the city council, the mayor and experts. A programming committee also comprised representatives of the business sector, NGOs and public employees. The draft document was submitted to neighbouring municipalities and the Śląskie Voivodeship marshal office for consultation. The University of Economics in Katowice led the technical works for the elaboration of the strategy; the city prepared the draft resolution for the approval of the final document. The steering committee organised a series of workshops that included the strategy's four different priority areas, where the strengths, weaknesses and development strategic goals were discussed. After the workshops, a revised version was presented to citizens for feedback and the city authorities in particular asked for citizens' opinion on the relevance of the strategic projects included in the strategy. The local self-government conducted a survey to gather more data to support the strategy. After the consultation process, the draft document was revised and presented to the city council for approval and implementation.

Source: For Krotoszyn: notes from the first OECD fact-finding mission to Poland in February 2020. For Łańcut: county notes of the second OECD fact-finding mission to Poland in February 2020. For Katowice: notes of the first OECD fact-finding mission to Poland in February 2020 and City of Katowice (2016^[10]), *City Development Strategy Katowice 2030*, https://www.katowice.eu/Documents/strategia_miasta_sklad_eng.pdf.

What is included in a Polish LDS?

LDS vary in terms of what they normally include, although this may change in light of recent reforms. The LDS reviewed for this study (i.e. the municipalities of Gdańsk, Katowice, Kraków, Łódź and the regions of Dolnośląskie, Podkarpackie, Podlaskie and Mazowieckie) have all or some of the following basic elements:

- **A socio-economic diagnostic of the LSGU.** In Poland, like in other OECD countries, formulating an LDS starts with a diagnostic of the condition of a self-government unit and the way any change might influence its economy. This constitutes the economic profile of the LSGU that contains an analysis of the main strengths, weaknesses, opportunities and threats (SWOT analysis) for development. The importance of a strong evidence-based diagnostic is that it ensures that the visions and directions contained in an LDS are not a “wish list”. The cases analysed generally include a SWOT analysis that provides a concise picture of the local social, economic and environmental context of the LSGU. However, the SWOT analysis does not always connect the evidence, community engagement and proposed programmes involving quantitative and qualitative elements. Across Poland’s LSGUs, the quality of the diagnostic seems to be quite variable. Difficulties in data gathering, lack of economic analysis skills and the lack of evaluation of former plans hinder the elaboration of the socio-economic diagnostic.
- **A development vision.** The LDS contain a development vision for the medium and long terms. Although long-term planning does not seem to be a constant practice in Poland’s planning culture, the LDS consulted for this study contained a development vision that described the LSGU in 10-15 years’ time (Table 3.3). However, in some cases, the decision on the vision and strategic goals depends on the results of political elections as they are regarded as a proxy for interpreting citizens’ expectations. Some municipalities such as Kraków organised a series of workshops to define the vision and mission of the LSGU that constituted the core of its Development Strategy for 2030 (City of Kraków, 2017^[11]).

Table 3.3. Examples of vision statements of selected LDS in Poland

LSGU	Vision statement
Podlaskie Voivodeship	Vision of Podlaskie Voivodeship in 2030: “Entrepreneurial, partnership, perspective”
Municipality of Kraków	Vision: “A modern metropolis bustling with culture, open, rich, safe and friendly, proud of its historic heritage, co-created by its residents”
Municipality of Łódź	Vision: “A friendly, innovative and dynamic city of sustainable development with competitive living, working and investing conditions, exploiting its historical, infrastructural and creative potential”

Source: Podlaskie Voivodeship (2020^[12]), *Strategia Rozwoju Województwa Podlaskiego 2030 - Strategia Rozwoju Województwa Podlaskiego*, https://strategia.wrotaopodlasia.pl/pl/strategia_rozwoju_wojewodztwa_podlaskiego_2030/; City of Kraków (2017^[11]), *Kraków Development Strategy - This Is Where I Want to Live - Kraków 2030*, [https://www.bip.krakow.pl/plik.php?zid=212318&wer=0&new=t&mode=shw](https://www.bip.krakow.pl/plik.php?zid=212318&wer=0&new=t&mode=shw;); City of Lodz Office (2012^[13]), *Integrated Development Strategy for Lodz 2020+*, https://bip.uml.lodz.pl/files/bip/public/miasto/dokumenty/BSM_strategia_ang_20131018.pdf.

- **Implementation principles to make the vision a reality.** Some LSGUs set principles for the implementation of the LDS. The success of their LDS, they argue, depends on the level of commitment to the principles of various administrative units in the LSGU. Therefore, LSGUs encourage all actors directly involved in the implementation of the LDS and the various local sectoral strategies to follow them. For example, the Podlaskie Voivodeship and the municipality of Kraków have set implementation principles and both emphasise the need for building partnerships (Table 3.4). There are aspects where they differ. For example, whereas the municipality of Kraków emphasises the need for flexibility and setting priorities for financing, the Podlaskie Voivodeship gives priority to multi-level governance issues (multi-level management, co-ordination and subsidiarity). This could be due to their specific roles and responsibilities. The regional government

may have a more active role as co-ordinator, linking actors from different levels of government, whereas the municipal government's main priority focuses more on how to implement local strategies, plans and programmes (see Chapter 6).

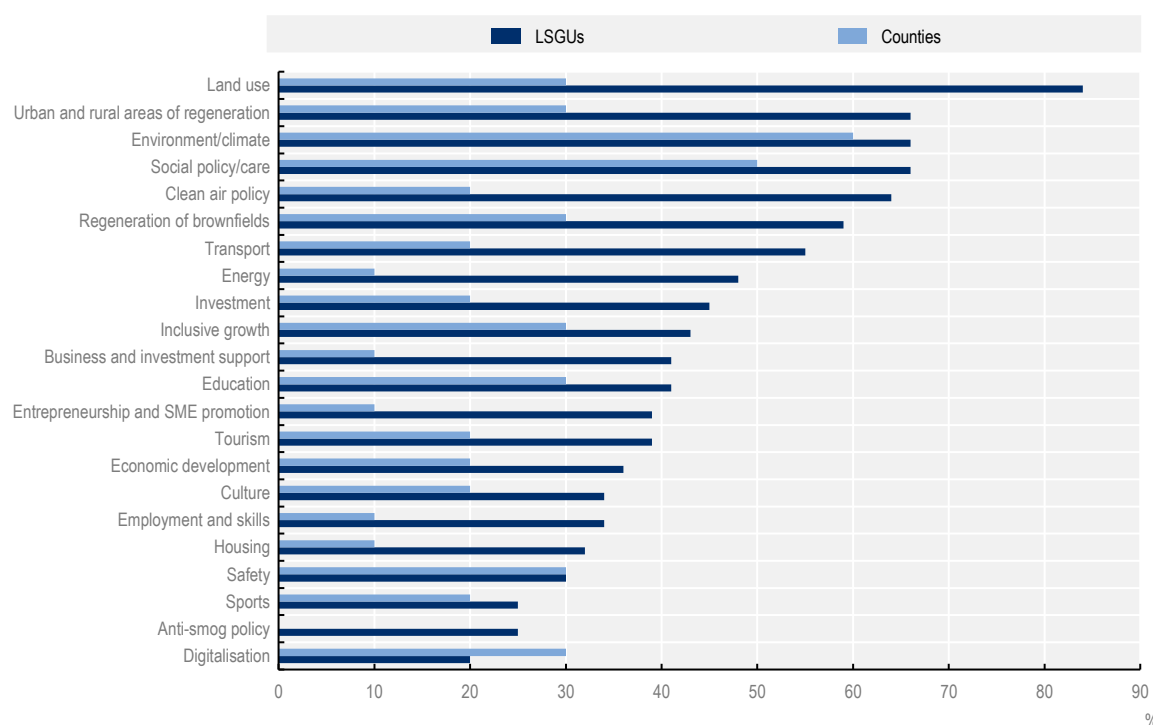
Table 3.4. Implementation principles of the LDS: Podlaskie Voivodeship and Kraków

Podlaskie Voivodeship	City of Kraków
Partnership – Joint participation, shared decision-making and shared responsibility of public and non-public bodies in the realisation of common activities contributing to the achievement of the LDS as well as in M&E activities.	Participation and partnership – Open co-operation and equal treatment of representatives from various environments and institutions.
Integration – The objectives of the LDS are realised to varying degrees by all public bodies within the sphere of their competencies and various territorial systems.	Consequence and responsibility – In implementing the adopted priorities and actions.
Co-ordination – Achieving the objectives of the LDS requires comprehensive co-ordination of activities of various entities. Their role is to break down barriers and deficits in terms of co-ordination at the regional and local levels.	Integrated activities – Striving to achieve a cohesive and holistic perception of the developmental processes that make up the huge and tightly interconnected ecosystem of the city.
Subsidiarity – The implementation of public intervention is carried out by various entities at the level that guarantees its highest effectiveness.	Financing priority – For the programmes and projects incorporated in the LDS and those that derived directly from it, this applies both to the city budget and external sources of financing.
Respect for the natural environment – The implementation of the LDS follows the idea of sustainable development that will allow building competitive advantages for the voivodeship, with living conditions for future generations in mind.	Flexible response – The catalogue of policies, strategies, programmes and strategic projects adopted in the LDS might be modified depending on the changes that take place in the LSGU surrounding environment.

Source: For Podlaskie: Podlaskie Voivodeship (2020_[12]), *Strategia Rozwoju Województwa Podlaskiego 2030 - Strategia Rozwoju Województwa Podlaskiego*, https://strategia.wrotaopodlasia.pl/pl/strategia_rozwoju_wojewodztwa_podlaskiego_2030/. For Kraków: City of Kraków (2017_[11]), *Kraków Development Strategy - This is where I want to live - Kraków 2030*, <https://www.bip.krakow.pl/plik.php?zid=212318&wer=0&new=t&mode=shw>.

- **LSGUs integrate a wide spectrum of policy issues into their LDS.** For the LSGUs, achieving the LDS vision relies on the attainment of sectoral policies expressed by local sectoral strategies (i.e. land use, housing, municipal services management, spatial policy, transport and communication, culture, education, sports, social inclusion and health policy) derived from the LDS and for what they need financial, material and human resources to implement them (Figure 3.2). Such an approach requires executive local programmes and plans that include timetables for implementation and a financial plan correlated with the municipality's budget, such is the case in the municipality of Katowice's LDS (City of Katowice, 2016_[10]). LSGUs do not prepare strategies for every single sector; this depends on their resources, investment priorities and legal requirements. The timeframe of every plan may vary depending on the sector. For example, land use plans are open-ended in 72% of the cases, whereas 30% of social policy plans have a timeframe of 1-5 years and 27% 5-10 years. In some cases, LSGUs contemplate drafting an implementation plan, such as in Kraków, to ensure the relevant relations and connections among the strategic programmes and financial instruments and indicate which entities are responsible for achieving those goals (City of Kraków, 2017_[11]).

Figure 3.2. Sectoral/executive plans prepared by counties and municipalities



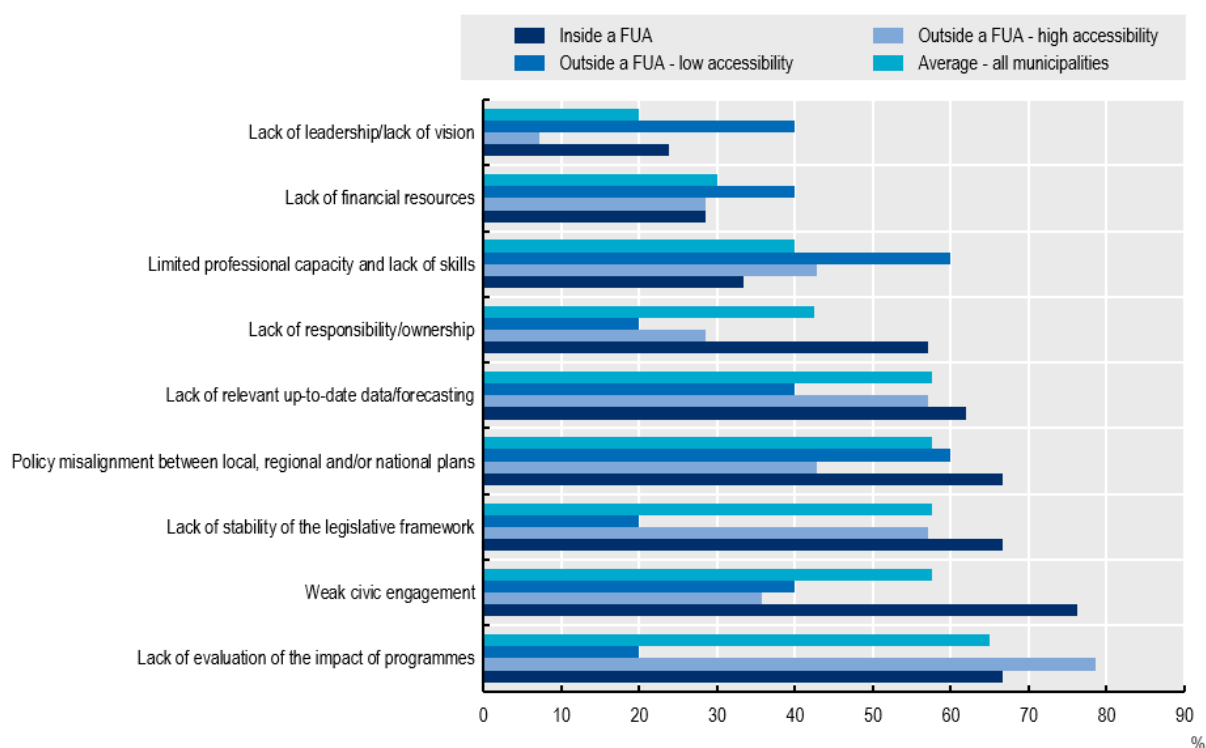
Note: Based on 50 LSGU responses to the OECD questionnaire (n=50), whereof 8 are counties and 42 are municipalities. Data not indicative as not all LSGUs answered the question. While the size of the questionnaire response sample does not allow to draw statistically relevant conclusions, it nevertheless offers sample-specific insights that may be relevant for a larger audience of Polish LSGUs.

Source: Authors' own elaboration based on LSGU responses to the OECD questionnaire (2020).

The elaboration of the LDS faces a number of challenges

All municipalities face obstacles in the preparation of their LDS that condition the quality of the document, but these vary according to their level of technical capacity. Some municipal LDS are sound planning documents (as is the case in Kraków, Łódź and Warsaw), whereas the plans of smaller municipalities often present weaknesses in terms of design, content, data and coverage. The lack of an integrated planning approach that takes into account socio-economic and spatial issues in the planning process is a key concern. Figure 3.3 presents the challenges municipalities face in the elaboration of their LDS, which differ by type of municipality. For example, the main obstacle for municipalities inside a FUA is weak civic engagement; the challenge for municipalities outside a FUA with high accessibility is a lack of evaluation of the impact of programmes and for municipalities outside a FUA with low accessibility, policy misalignment across levels of government and limited professional capacity and lack of skills are the main barriers.

Figure 3.3. Main challenges to designing an LDS by type of municipality



Note: Based on 40 responses from municipalities to the OECD questionnaire (n=40). It includes results from both answers “A major challenge” and “Somewhat of a challenge” to the question: “In general, what are the main challenges with respect to setting/elaborating local development strategies/local development plans?”. While the size of the questionnaire response sample does not allow to draw statistically relevant conclusions, it nevertheless offers sample-specific insights that may be relevant for a larger audience of Polish municipalities. Source: Authors’ own elaboration based on responses from municipalities to the OECD questionnaire (2020).

Figure 3.3 reveals some of the main weaknesses of policy-making and planning-making in Poland. It suggests that, in Poland, strategic planning for local development suffers primarily from the lack of impact evaluation of the programmes that are part of the strategy preventing assessing progress. This makes it difficult to determine whether the programmes are generating the expected positive impacts on the target population and there is no assurance that a given programme is reaching its goals (see Chapter 4 and discussion below). Despite the efforts to get citizens involved in local development planning discussion – which has to be done by law – the reality is that civic engagement is weak, particularly in large cities. This may be explained by the lack of proper mechanisms for engaging stakeholders in public affairs (see Chapter 8 and discussion below). Equally important, policy misalignment across levels of government, the instability of the general regulatory framework set at the national level and the lack of up-to-date data are features of local development planning in Poland. Most of these issues are being addressed through the reforms to the Act on Principles of Implementation of Development Policy. However, the national government may be advised not to adopt an across-the-board approach in assisting municipalities but a flexible approach that responds to the specific challenges every municipality has. For example, while more attention needs to be given to the technical capacity of personnel in municipalities outside a FUA, municipalities inside a FUA require assistance on how to engage with citizens.

Figure 3.3 and information obtained during the fact-finding missions show a scenario where:

- *A constantly changing regulatory framework requires municipalities to invest more time and resources to be up to date on the new legal requirements for local development.* Changing the regulatory framework per se is not a problem as it normally needs updating or finetuning to a

changing context. However, constant changes may delay decision-making or invalidate any policy decision already made that could present operational and logistical problems for municipalities, causing delays in the design and implementation of the LDS (see Chapter 9). In the municipality of Międzyrzec Podlaski (urban), the constant changes to the regulatory framework complicate the elaboration of the multi-annual forecast to identify revenue and expenditure, making it difficult to plan the annual budget. In the municipality of Międzyrzec Podlaski (rural), this situation increases the complexity of administrative procedures, discouraging citizens from making investments.

- *The socio-economic diagnostic and subsequently the LDS are frequently based on outdated and inaccurate data.* Most diagnoses are based on data collected from sources such as public statistics, monographies, registers, academic research, data collection exercises conducted by the municipality as well as existing official documents. Some municipalities may collect data but use different standards from the national statistics office Statistics Poland and comparability is thus problematic. Conducting a full diagnosis of the local system is also made difficult due to the obligation of keeping certain statistics confidential. Statistics Poland has data for regions and counties on a large number of policy issues; however, finding data at the local or district/neighbourhood level is more problematic. Urban issues require, for example, high spatial resolution data such as traffic surveillance but it is not easily available or is not collected. Moreover, local authorities in some cases only have access to outdated data. This is particularly the case of smaller and rural municipalities. Preparing an LDS requires forecasting development based on observed trends, the economic context and identified needs but this is not frequently observed in Poland in part due to the lack of data.
- *Data is not effectively used.* The analysis of a sample of LDS shows that, in some cases, the evidence base in the policy documents is presented in a descriptive way, without any additional analysis of inference as to what may be driving or constraining growth and development. This could be due to the lack of staff trained to interpret data and conduct economic analysis. Moreover, the assessment of data is primarily based on administrative boundaries, not on FUAs. Raw data are rarely useful on their own and not all municipalities have the tools and skills to summarise data and determine relationships between inputs and outcomes.
- *Poor planning capacity at the subnational level of government.* The issue of capacity has been raised by several municipalities consulted for this study and there appears to be a shortage of capability and plan-making capacity at different levels in Poland, mostly in municipalities outside a FUA with low accessibility. While municipalities inside a FUA may be large enough to develop this capacity there may still be some short-term issues that constrain the building of an LDS. For example, teams may be lacking experience in cohesion and integration of different levels of plans. In many instances, local employees do not receive any training and learn on the job. When training is available, it is sometimes not related to officials' direct tasks.
- *The lack of financial resources for the elaboration of the LDS prevents accessing knowledge, data and experience.* The elaboration of the socio-economic diagnostic, spatial development plan and LDS is costly. Without adequate funding, municipalities cannot access technical expertise, data or conduct data collection exercises such as surveys. Even if the LDS is made in house, the local authority incurs expenses such as officials' time, hiring consultants, data gathering, organisation of stakeholders involved in planning, etc., which need to be budgeted.⁵

Strategic planning also faces structural planning challenges

Every municipality is required by law to prepare a spatial development plan but they are not obliged to follow it. When spatial plans are prepared, they are usually done for a very small territory (OECD, 2016^[9]), with detailed spatial interventions that often fail to take into account the larger urban dynamic (IBRD/World Bank, 2018^[14]). Most new developments are undertaken through ad hoc development decisions, which often ignore the provisions of and are not part of a coherent spatial plan (OECD, 2016^[9]). Spatial plans are

developed in isolation from each other under a piecemeal spatial planning approach and do not take into account the big picture of appropriate, liveable developments. The lack of a good spatial organisation has brought about urban problems such as an increase in daily mobility needs and therefore transport intensity, which is a consequence of the mismatch between jobs and residence (Śleszyński et al., 2020^[15]). Although spatial and zoning plans are normally consulted with citizens, a key concern is the quality of the engagement with citizens, which may not be the same across all municipalities (see Chapter 8).

Poland lacks an effective framework for land use/spatial planning. The national government has set a legal framework that regulates land use and building and has developed a national spatial strategy. The 2003 Spatial Planning and Development Act provides broad provisions for the development of background and technical studies for spatial planning and the need to harmonise local plans with the spatial development plan of a voivodeship and, subsequently, the latter plan with a decision on spatial planning at the national level. Regional governments have regional spatial plans, which describe general development conditions and demarcate the regional settlement system. Nevertheless, the detailed decisions on how land is used take place at the local level through local spatial development plans and planning decisions (Box 3.4).

A large number of municipalities have issued at least partial land use plans. Spatial plans can provide a way to co-ordinate investments in areas such as culture and tourism, service delivery and transportation. However, preparing a spatial development plan may take up to three years; when there is a change of land use, local authorities need to compensate private owners affected by any change as in some cases they are no longer able to use the land as before (OECD, 2016^[9]). This issue is all the more pressing given the rapid pace of peri-urban developments which have led to incompatible land uses and more costly infrastructure and service delivery in many parts of the country (OECD, 2018^[16]). However, interviews held during the fact-finding missions for this review suggested that spatial policies are not always well aligned with sectoral policies such as infrastructure, transportation and the LDS. Land use/spatial plans are thus not that effective in managing land use conflict, and anticipate and react to changing conditions. Poland has a balanced settlement structure with a number of small, medium-sized and large municipalities as opposed to the dominance of just one or a few large cities. This structure raises the importance of rural-urban linkages and co-ordinated spatial planning (OECD, 2018^[16]).

Municipalities tend to rely heavily on the “one-off” planning decisions that constitute an obstacle to the proper use of land and development planning. The reason is that planning decisions “can create an incentive for disjointed development and are a procedure that runs parallel to the planning system as a whole, and often with contrary aims. In many municipalities, planning decisions are credited with leading to poorly co-ordinated developments and sprawl” (OECD, 2016, p. 41^[9]).

Until recently there was a lack of incentives for functional metropolitan planning and co-operation for development and land use. Poland’s national and regional spatial strategies highlight the importance of adopting a functional perspective for regions. In the Łódź region, for example, the long-term regional strategy identifies poor functional connections, a lack of regional identity and rampant spatial conflicts related to (sub)urbanisation as major issues (OECD, 2016^[9]). The problem is that municipalities, both large and small, compete rather than co-operate with each other. Since per capita income tax transfers are a major source of funding for LSGUs, they compete with one another for population growth. Funding from the EU offers some incentives to adopt a metropolitan approach to local development and spatial/land use planning through integrated territorial investments. They push municipalities to promote projects based on a partnership collaboration model. There are few structural incentives for municipalities to co-ordinate on public investments. The Metropolitan Association of Upper Silesia and Zagłębie (Górnośląsko-Zagłębiowska Metropolia (GZM Metropolis)), Gdańsk and Łódź offer some examples of how LSGUs can work together on common projects such as urban regeneration, energy purchases and the delivery of social, educational and healthcare services (OECD, 2016^[9]). The recent reforms to the Act on Principles of Implementation of Development Policy provide the basis for co-operation among municipalities through the creation of supra-municipal development plans.

Box 3.4. The Polish framework for spatial planning

At the national level, there are two main instruments for spatial/land use planning

- The **2003 Spatial Planning and Development Act** regulates the development of spatial policies and spatial plans (concepts, plans, studies) and divides various powers among the administrative tiers of government. It provides the mechanisms through which to engage the public in the development of spatial plans and how to resolve conflicts between parties (citizens and LSGU).
- The **National Spatial Development Concept 2030 (NSDC)** is the national level spatial plan. The document presents an assessment and analysis of the state of spatial planning in the country and puts forward a vision for the country's spatial development to the year 2030. The NSDC offers an assessment of key challenges and guidance on how to co-ordinate and implement public policies that have a significant territorial impact.

Poland's LSGUs have three instruments for land use/spatial planning

- **Spatial studies** form a kind of master plan for development in an LSGU but they are not an act of law. These spatial studies are referred to in the Planning Act as a "study on the conditions and directions of spatial development". They are a legislated (obligatory) framework study used to guide local planning policy in municipalities in the preparation of local spatial development plans. Although the spatial study is not legally binding, local spatial development plans should be consistent with it.
- **Local spatial development plans** are legally binding documents; they are essential planning document for an area. They prescribe particular permissible assignment of land uses and detail the size and volume of permitted development, rules for property division and the protection of cultural assets and heritage buildings for a given area in a municipality. The ordinances outlined in local spatial development plans are the only legal mechanism that LSGUs have to determine development boundaries and direct permitted uses.
- **Planning decisions** are a simplified administrative mechanism for building approvals and change of land use. They are used for the location of public and private investments in areas for which there is no valid land area development plan. Planning decisions are not required to be consistent with as LSGU's planning study, which sets out the conditions and directions for development.

Source: OECD (2018^[16]), *OECD Rural Policy Reviews: Poland 2018*, <https://doi.org/10.1787/9789264289925-en>; OECD (2016^[9]), *Governance of Land Use in Poland: The Case of Lodz*, <https://dx.doi.org/10.1787/9789264260597-en>.

Funding, especially from EU funds, drives planning. Interviews with local Polish officials during the fact-finding missions revealed that the selection of some investment projects for development included in the LDS seems to be largely dictated by their probability of getting resources from EU funds. The municipality of Zibięce in the Dolnośląskie Voivodeship has had to narrow down the number of activities included in its LDS because it has not been able to sustain the long-term perspective of financial allocation. This situation also suggests that, in Poland, making strategic choices is not a common exercise in plan-making. Municipalities anticipate different sources of funding but their problem is how to weigh and measure the projects that should be included in the LDS. Thus, the LDS tends to include a large number of activities, promising to meet almost all needs of all current and future inhabitants and economic entities in a short period of time.

The integration of different policy sectors into a coherent development strategy needs to improve. The role of the LDS is to integrate different policy sectors, delivery instruments and funding streams for maximum effectiveness but this is rarely the case in Poland. The LDS do not always include or seek horizontally integrated solutions combining actions in different sectors (i.e. social, economic and environmental). There is no mandate for co-ordination and this is contingent on the specific situation. Problems are still compartmentalised to specific sectors without the creation of synergies with other policy sectors.

The current system of national planning and local governance only offers municipalities the possibility of voluntary or collaborative planning. According to OECD research, municipalities do not have the capacity to play a direct role in the planning decisions of other municipalities despite the adverse impacts it may experience from their decisions. In this setting, some municipalities try to establish close co-operation and co-ordination mechanisms with neighbouring municipalities even if they are not underpinned by an enforceable legal framework (OECD, 2016^[9]). However, this type of co-operation is mostly based on trust that needs to be built as the collaboration develops but it is sometimes hindered by political differences. Vertical co-ordination is, in general, ensured as local authorities are required to consult with the regional self-government units (marshal offices) regarding the development of their LDS.

Co-ordination of public investment beyond the administrative unit is complicated to organise as it requires a number of administrative and legal arrangements. The LDS and spatial planning do not assess development needs based on functional criteria because planning is limited to geographic administrative units and understood as a simple preparation of plans rather than a tool to reach consensus on common problems and their solutions (see Chapter 1). Municipalities can co-operate for investing in projects such as infrastructure (i.e. roads) but they need to issue an agreement for that and there is no guidance on how this should be done. The first hurdle is to choose the financing source and this requires negotiation among municipalities as not all have access to EU funds. In the Dolnośląskie Voivodeship, for example, municipalities are co-operating to improve the rail network, build a new railway line and establish an energy cluster to have access to renewable energy. These projects require close co-ordination among the different municipalities in the region to find adequate planning, financing and project management instruments for each project. Preparing the documentation represents a considerable administrative burden and costs for municipalities. The municipality of Płock has made progress on improving transport in the interior of the city thanks to EU funds but its problem is to ensure an efficient transport connection with other municipalities as it is located far from motorways and railways lines, making the city less attractive for living. This requires co-ordination with other municipalities and levels of government, which is proving complicated due to administrative burden (see Chapter 6).

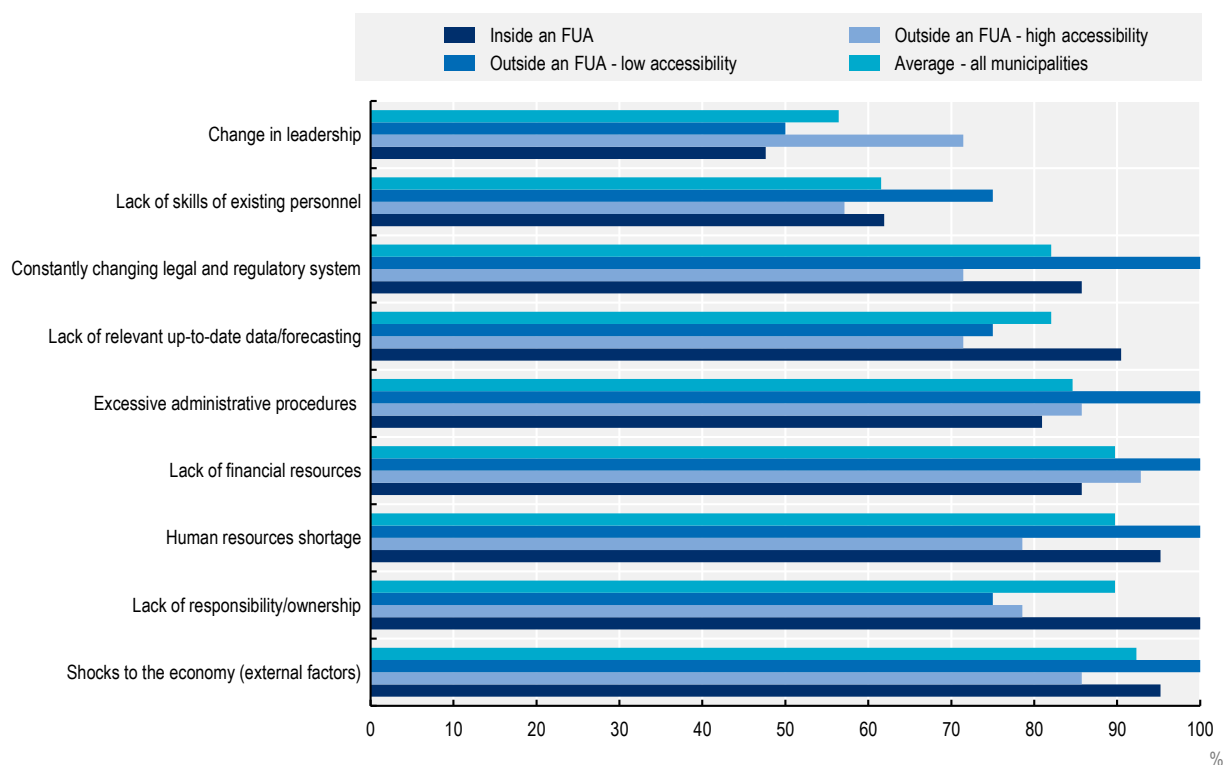
Authorities in regional self-governments can establish a development and planning strategy that cuts across member municipalities but these documents are not enforceable even if agreed upon (OECD, 2016^[9]). This setting prevents municipalities from influencing development strategies on adjacent municipalities. For example, the city of Łódź is part of a larger metropolitan system that links municipalities of varying size, population and wealth. Within the metropolitan area, Łódź is by far the largest and wealthier city and has the most administrative capacity. The adjacent municipalities tend to be strongly connected to Łódź in terms of employment flows, retail activity and their use of services. Because of the high degree of interconnectedness, there should be a strong interest in co-ordinated development and planning (OECD, 2016^[9]). Moreover, the free-riding of Łódź's public services by rural municipalities within the metropolitan area exacerbates the cost-of-service delivery. In 2020, the FUA of Toruń, in north-central Poland, received EUR 170 million for activities to improve the functionality of the area. The problem has been that not all municipal authorities in the area are convinced by the need for a FUA and focus exclusively on their local matters.

Managing strategic planning for local development

The implementation of the LDS faces a number of obstacles

The implementation system of the LDS is relatively weak. All municipalities face technical, economic and administrative obstacles to implement their LDS but those vary depending on the municipality's size and technical-administrative capacity and capability. Figure 3.4 shows that shocks to the economy, lack of responsibility, human resources shortages, insufficient financial resources and excessive administrative procedures constrain the implementation of the LDS across all municipalities regardless of their size and location (within or outside a FUA). The LDS generally lacks information on by whom, when and how the LDS is supposed to be used, how it should be implemented, how an implementation should be monitored and how it is supposed to undergo corrections and adjustments (Sztando, 2008^[17]). They tend to lack procedures that guarantee assigning means in an annual budget to implement its tasks. Even when the system of implementation is specified, sometimes it cannot be followed as it is not adjusted to legal, financial, human resources and timing conditions of the municipality for which it was created. This is most commonly the case in municipalities outside a FUA with low accessibility. The amendments to the Act on Principles of Implementation of Development Policy (Box 3.2) are expected to strengthen the implementation system but it remains unclear how this is going to be done as every municipality has different levels of capacity and capability.

Figure 3.4. Main challenges to implementing the LDS



Note: Based on 39 responses from municipalities to the OECD questionnaire (n=39). It includes the results from both answers "A major challenge" and "Somewhat of a challenge" to the question: "In general, what are the main challenges to implementing local development strategies/local development plans?". While the size of the questionnaire response sample does not allow to draw statistically relevant conclusions, it nevertheless offers sample-specific insights that may be relevant for a larger audience of Polish municipalities.

Source: Authors' own elaboration based on responses from municipalities to the OECD questionnaire (2020).

The municipalities struggle to finance the implementation of the LDS

The lack of financial resources is a major challenge for the implementation of the LDS. Many LDS are not fully implemented because the investment resources have not been identified in advance and the private sector has not been effectively engaged. According to the results of the OECD questionnaire, the lack of financial resources and the underestimations of the costs of the LDS projects is one of the major challenges municipalities have when implementing their development strategy. LDS generally lack an implementation plan that signals how financing is going to be secured.

In Poland, not all of the LDS consulted for this study included a financial framework for the implementation of the strategy. This is a critical aspect as a strategy is needed to channel public resources to priority sectors in order to achieve LDS social and economic development goals. Recent reforms (Box 3.2) require municipalities to include a financing model and plan in their LDS, which may help to ensure that a development strategy does not remain a paper exercise. However, until now, when LDS have a financial framework, they mostly consider potential sources of funding only and not actual sources. For example, the LDS of the municipality of Kraków includes a financial framework that describes the potential sources of funding of the development strategy but not concrete sources, and resources are mostly expected to come from external sources (Table 3.5) (City of Kraków, 2017^[11]). In the municipality of Międzyrzec Podlaski (rural), authorities also first develop the LDS, estimate costs and list potential sources of financing. Once the LDS is approved, authorities look for funding that may come from subsidies, preferential loans and on pocket expenses. The municipality of Łubianka reported problems in securing funding for the LDS, part of the problem residing in the fact that the strategy and financing do not overlap: they are prepared separately and the municipality has to rely heavily on external sources of funding.

Table 3.5. Financial potential that might be engaged to implement the LDS of Kraków

Billions of PLN

Sources of funding	2017-23	2024-30	Total
City budget	4.1-5.7	4.5-6.9	8.6-12.5
State budget	1.9	3.3	5.3
EU funds, including:	5.8-12.1	0.0	5.8-12.1
EU funds – LSGU of Kraków (public investment)	1.3-7.4	0.0	1.3-7.4
EU funds – Kraków based enterprises	2.9	0.0	2.9
EU funds – other public funds	1.6	0.0	1.6
Other external sources of funding	0.2	0.2	0.4
Business organisations	69.8	77.6	147.4
Investments in industry and construction	52.4	59.7	112
Housing market	23.7	12.4	36.1
Office market	21.3	43.5	64.8
Total			167.5-177.7

Note: Other external sources of funding include subsidies from the budget of the region's LSGU and the voivodeship's budget, target funds.

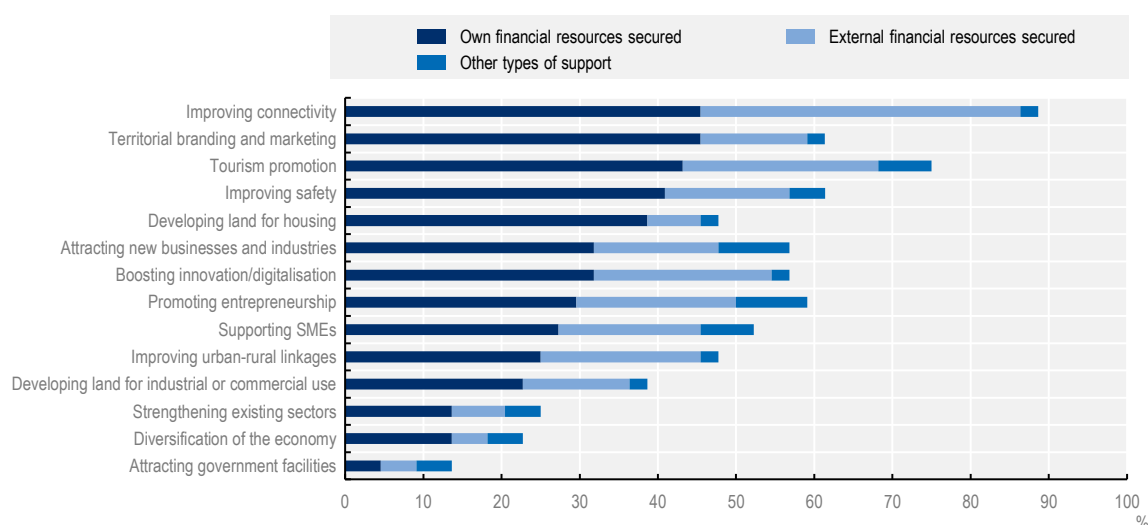
Source: City of Kraków (2017^[11]), *Kraków Development Strategy - This is where I want to live - Kraków 2030*, <https://www.bip.krakow.pl/plik.php?zid=212318&wer=0&new=t&mode=shw>, p. 70.

According to the findings of the OECD questionnaire, shocks to the economy also hinder the implementation of the LDS. The COVID-19 crisis is likely to create major setbacks in financing development. Domestic resource mobilisation, tax and non-tax revenues will suffer as economic activity is reduced (OECD, 2020^[18]). As in other countries around the world, Polish local and regional self-governments will be on the frontline for the long-term local economic recovery that will create more pressure on their already limited financial resources. Job losses in sectors such as tourism and local

consumption (including large retailers and businesses in the hospitality industry) will have a negative impact on local public income (OECD, 2020^[18]).

In Poland, municipalities finance the implementation of the LDS using resources they have secured from the national government via transfers and their own generated revenues (Figure 3.5). This suggests that local self-governments are the key funders of local development but the main question is how LSGUs themselves are funded, which actually has repercussions on how and in what quality they finance local development. Property tax is LSGUs' main source of income but municipalities are not allowed to exceed a cap limit and some often do not approach this limit or even give up collecting this tax (see Chapter 5). The Law on Municipal Self-Government allows residents to decide on additional taxation through a referendum but so far this mechanism has not been used in the country. Poland's subnational governments collect a small share of revenues from taxes and rely heavily on grants and subsidies from the national government and, when possible, EU funds. Other sources of potential funding could include different levels of government (local, regional, national, EU) and a number of possible sectors (i.e. employment, infrastructure, land development, regeneration, marketing, etc.). The municipalities of Ziębice in the Dolnośląskie Voivodeship and Krotoszyn in the Wielkopolskie Voivodeship receive, for instance, more than 50% of their income from national government transfers. Municipalities also receive fund from the Family 500+ Programme, a family income-supporting benefit introduced by the national government in 2015 to reduce poverty, improve the well-being of families and increase the fertility rate.⁶ In Poland, the national government remains a significant source of funding for regional development through domestic funding and EU funds that are channelled through the national government (Opilowska, 2019^[19]).

Figure 3.5. Financing policy issues contained in the LDS that promote local growth in Poland



Note: Based on 39 municipal responses to the OECD questionnaire (n=39). While the size of the questionnaire response sample does not allow to draw statistically relevant conclusions, it nevertheless offers sample-specific insights that may be relevant for a larger audience of Polish municipalities.

Source: Author's own elaboration based on municipalities' responses to the OECD questionnaire (2020).

The OECD Principles on Urban Policy suggests that to harness adequate funding for the implementation of urban policy, it is necessary to leverage private sector funding where appropriate with a view to maximising related opportunities and address risks (OECD, 2019^[7]). However, Figure 3.5 shows that Poland's LSGUs are not using the financial potential of the private sector. Attracting private investment and building investment markets are key to successful LDS; it should not only depend on public funding. The private sector mostly finances private investment as part of the LDS and the public sector funds

infrastructure. Public-private partnerships (PPPs) are not widely used to boost investment for development. Across Polish LSGUs, the potential of collaborating with the private and voluntary sectors for local development is not widely valued. It was not possible to find evidence of investment projects where public and private sectors have joint forces to share risks and returns. If Polish LSGUs want to increase the likelihood of success in the implementation of their LDS, they need to be able to attract private investment to make the development process sustainable.

LSGUs do not have the ability to release the necessary matching funds through the development of appropriate schemes that will interest investors. The problem is that Poland's LSGUs depend heavily on grants and subsidies that limit their room of manoeuvre to generate funding for the implementation of the LDS. The financial transfers from the national government to subnational governments are often earmarked and they can only be disbursed for specific purposes, such as education. Own revenues and general subsidies aim to finance the own tasks of the LSGUs, while specific grants are designed to fund allocated tasks. In 2016, for instance, grants and subsidies represented 65% of county revenues, 56% of municipality revenues and 47% of regional revenues (Table 3.6) (SNG-WOFI, 2019^[20]). Cities with a county status have a more diversified structure of revenues, as grants and subsidies represent only 38% of their revenues.

Table 3.6. Subnational government revenue by category in Poland, 2016

	Dollars (purchasing power parity)	Percentage of GDP	Percentage of general government revenue (same revenue category)
Total revenue	3 598	13.1	33.9
Tax revenue	1 175	4.3	20.8
Grants and subsidies	2 072	7.6	
Tariffs and fees	290	1.1	
Property income	46	0.2	
Other revenues	15	0.1	

Source: Author's own elaboration based on SNG-WOFI (2019^[20]), *Poland*, <http://www.sng-wofi.org/country-profiles/Fiche%20POLAND.pdf> (accessed on 8 July 2020).

The LDS lack an investment strategy

Poland's LSGUs do not always issue local investment strategies complementary to the LDS. It is widely accepted that the implementation and financing of the LDS require the participation of private and voluntary sectors but LSGUs need to organise themselves to secure that investment. Without a local investment strategy, the LDS is not likely to achieve much over time. The share of public investment carried out by subnational governments in Poland is among the lowest in the OECD, with only 8.92% of subnational expenditure, well below countries like Ireland (13.41%), Portugal (13.89%), France (17.81%), Turkey (23.25%) and New Zealand (31.36%) (OECD, 2018^[21]). Thus, Poland needs to ensure – particularly in the context created by the COVID-19 pandemic – that LDS act as mechanisms to attract and co-ordinate private and public investments, identify and address potential sources of public funding, and identify the returns they offer to different public sector funding streams.

Interviews for this review revealed that LDS are not normally specific enough in terms of investment directions. There are some assumptions of investment in the multi-annual budget but no concrete investment projects in the LSGUs development strategies. Poland's LSGUs need to innovate in local investment mechanisms that local economic development requires. However, small municipalities like Ziębice are just learning how to attract investment in co-operation with academia and to retain the population. This is of key importance as the municipality wants to develop its tourism infrastructure based

on valuable historic architecture and natural environment (e.g. its development of eight bicycle routes funded by EU rural funds). According to the experience of OECD countries, when local development works well, it produces returns for those who invest: jobs, incomes, growth business, improved tax revenues for the public sector, new markets and further investment opportunities for the private sector (Clark and Mountford, 2007^[22]). That is why there has been a number of innovations on how to finance local development across OECD countries but they vary substantially. For example, tax credits and incentives in the United States have tended to do the work that grants-in-aid do in the United Kingdom when it comes to urban redevelopment. Canada has applied town centres investment mechanisms through clear statutory frameworks.

The LDS is not always accompanied by the necessary financial resources for implementation. Funding is not allocated to specific programmes as most of the time local authorities expect to be able to finance those with EU funds due to their limited resources. It is highly uncertain that most regional and municipal level planning documents are successfully implemented due to the weak links to the budget and the high dependence on EU funds (see Chapter 5). Failing to link the strategic goals of the LDS to the budget-setting process poses significant limitations to the municipalities' capacity to execute the strategy and achieve the goals. This is reflected in poor LDS implementation, misapplied resources and inadequate results on key performance indicators set in LDS. Poland's municipalities lack a budget-setting process around the LDS (see Chapter 5). Evidently, it is not realistic to expect that every line item on the budget can be connected to the high-level goals of the LDS. In some cases, that tie can be tenuous as it would take an extra step to outline how a programme links with the strategy, but the link will still be thought out and apparent. The municipality of Międzyrzec Podlaski (urban) has introduced a citizens budget process to define priorities of investment on issues such as the use of renewable energies, urban facilities, etc. However, the main challenge for the elaboration of the LDS is to reconcile conflicting needs and expectations.

Consultations for local development take place but lack impact

Poland's municipalities seem to be increasingly involving a wide range of stakeholders in development planning and other decision-making processes (Box 3.5). Public engagement seems to be more developed for co-designing the LDS than for co-implementing and co-monitoring it. According to the 2003 Spatial Planning and Development Act, public participation in the planning process has three aims: i) to inform the public about the development of new plans; ii) to receive feedback from all actors in the process; iii) to either incorporate or reject the resulting feedback while giving rationales for doing so. However, across Poland's municipalities, the effectiveness of public participation in local planning differs in their level of sophistication. It is largely determined by: the amount of resources available and the capacity of the local administration; the extent and features of these processes of public engagement as they could be very extensive or rather limited; how open or restrictive communication is; and at what stage of the process citizens are involved. There have been many efforts to provide support to municipalities in conducting consultations and fostering stakeholder participation in local public affairs. EU funds are used to recruit NGOs to provide municipalities support in public consultations.⁷ However, more needs to be done to build a culture of participatory governance as current efforts, although numerous, are scattered and insufficient for this purpose (see Chapter 8 on open government).

In Poland, the problem is not a lack of willingness to involve stakeholders in local planning but that the mechanisms used for this purpose may not be totally adequate. Although the LSGUs and the LDS consulted for this review revealed that consultation processes take place for strategic planning, the information gathered through the OECD questionnaire revealed that, for over 80% of municipalities and 90% of the counties, weak civic participation is one of the main obstacles in the elaboration of the LDS, particularly for municipalities within a FUA. In Poland, engaging with local stakeholders is mostly an activity of the municipalities, as counties do not have a close relationship with the local community. Łańcut County,

for example, relies on the information transferred by the municipalities after consultation with citizens on development needs.

Box 3.5. Municipal experiences in stakeholder participation in local planning in Poland

- The municipality of **Międzyrzec Podlaski** (urban) has introduced public consultation processes on issues such as parking facilities, use of renewables and investment projects. The municipal LDS and the spatial and zoning plans are also submitted to citizens and higher-level government institutions for comments and feedback.
- The municipality of **Płock** conducts extensive consultations (town hall meetings) for the development of its LDS and anyone interested in the planning process has the possibility to take part in the discussions.
- The municipality of **Kutno** has, reportedly, one of the highest indices of public participation in community affairs in the country as 2% of the citizens (800 inhabitants) are involved in the different stages of the LDS preparation.
- The municipality of **Międzyrzec Podlaski** (rural) allegedly consults almost every decision with citizens as there are monthly meetings with mayors to discuss local problems and possible solutions. Citizens have the possibility to submit comments and proposals during the consultation meetings organised by the municipality or online.
- The municipality of **Katowice** organises workshops on different policy areas included in the LDS where different institutions take part in the development of strategic goals. It has a close relationship with academia and the private sector for the development of the LDS and spatial plan.
- In 2017, the municipality of **Kraków** organised a participatory process for the building of its LDS. It included the organisation of workshops and surveys where experts, businesses and citizens were consulted on their vision for the development of the city until 2030. The material collected was used for in-depth discussions with representatives from the scientific, social, economic and public sectors to agree on a development vision for the city.
- The municipality of **Łódź** opened up the process of participation since the early planning stages for development of the historic urban core. Over 200 residents participated and there were 80 meetings with landowners. As a result, elements of the plan were modified, such as the addition of a new public space in the centre and more green spaces.

Source: Interviews held during the fact-finding missions to Poland. For Kraków: City of Kraków (2017^[11]), *Kraków Development Strategy - This is where I want to live - Kraków 2030*, <https://www.bip.krakow.pl/plik.php?zid=212318&wer=0&new=t&mode=shw>, p. 70. For Łódź: OECD (2016^[9]), *Governance of Land Use in Poland: The Case of Lodz*, <https://dx.doi.org/10.1787/9789264260597-en>.

In Poland, some of the problems that prevent local stakeholders from participating in community affairs and planning are the lack of information on local planning on the part of municipal authorities, weak mutual trust, insufficient training on civic engagement for public employees, limited funding for participatory processes and a poor understanding of the importance of civic engagement. Failing to engage stakeholders appropriately in local planning generates the risk of incompatibility between a wide range of community needs and expectations and the objectives of the LDS. Municipalities may lose the long-term capacity for applying local talent in public activities for the benefit of the community (Sztando, 2013^[23]). Citizens are generally involved in the last stage of the process; in other cases, they are only informed about

the plans and there is a lack of use of participants' experience and feedback. Moreover, local SMEs are often not invited to join the discussions. In some cases, as in Łańcut County and the municipality of Kutno, some members of the private sector are unaware of the possibility to take part in the process for the elaboration of the LDS and do not know the content of the strategy. It is essential to develop an approach that aligns government objectives with those of firms and organisations (OECD, 2018^[16]).

The preparation of the LDS also requires substantial inter-governmental co-operation, which entails a complex web of interactions between different levels of government (see Chapter 6). Some municipalities share their draft LDS with neighbouring municipalities and upper levels of self-government as well as the marshal offices for comments and suggestions and to ensure they do not cause conflict. With the implementation of the reforms to the Act on Principles of Implementation of Development Policy, these consultations will be compulsory. The level of feedback varies: in some cases it limits border issues regarding land use; in others, feedback is related to coherence with development priorities at the regional and national levels. Consultations among municipalities are voluntary and depend on the relations among political leaderships. Local governance for development planning is characterised by a limited co-operation among LSGUs on shared opportunities and problems as well as continuous conflicts among municipalities, counties and voivodeships over authorities' spending priorities and the use of EU funds (OECD, 2018^[16]) (see Chapter 6). Moreover, the weak co-operation among the LSGUs and the regional arm of national ministries (voivodeship office) hinders the effectiveness of local governance. Sometimes voivodeship offices lack the authority to work with their counterparts without explicit approval on a case-by-case basis from head offices in Warsaw.

Monitoring and evaluating the LDS present several weaknesses

In Poland, although there seems to be awareness across municipalities about the benefits of monitoring the implementation of LDS and their executive programmes, not all LSGUs are prepared to do it or include provisions for it in their planning documents. This is despite the fact that municipalities which receive EU funds are compelled to monitor and evaluate the results. According to the findings of the OECD questionnaire, just over 70% of municipalities and 80% of counties monitor the implementation of the LDS. The lack of a proper monitoring and impact evaluation of programmes is one of the main barriers to designing an LDS in municipalities within a FUA and outside a FUA with high accessibility.

There are several reasons why municipalities do not monitor the implementation of their LDS. Monitoring is sometimes seen as a much lower priority at the time of designing the LDS, as all efforts are aimed at launching the strategy and available resources are scarce. There is often limited follow-up on the implementation of the performance measurement strategy when it exists. Another problem is the lack of clarity and completeness of performance indicators to measure progress: the identification of expected results generally fails to clearly identify the full set of results and often confuse the articulation of outputs and outcomes. In addition, the lack of relevant data and information sources as well as feasible measurement strategies complicates monitoring and evaluating the performance of the LDS. There also seems to be little or no monitoring of external factors that influence the performance of the LDS, such as developments in other municipalities or regions, or the evolution of national and global trends. LSGUs also have a low capacity for monitoring the implementation of the LDS (see Chapter 4).

There are some relevant examples of how Polish municipalities conduct M&E of the LDS and its programmes. In the municipality of Katowice, the LDS contemplates the preparation of a synthetic report comprising qualitative and quantitative strategic indicators (related to a strategic field), activity indicators (referring to activities of individual departments in the strategy implementation process) and information about progress in the implementation of individual strategic activities. It includes indices that emanate from the different sectoral strategies (i.e. energy, culture, social policy, transport). Municipal authorities contemplate having a mid-term report and an *ex post* report. The indicators do not provide information related to the current and future state of the municipality in the different policy areas included in the LDS,

only the source of information (Table 3.7). Municipal authorities in Katowice have set up an internal monitoring committee that oversees the implementation of the LDS and reports to the LSGU council. Its task is to ensure coherence between strategy and needs, and evaluates how the indices contribute to the overall LDS. The municipalities of Kraków, Międzyrzec Podlaski (rural) and Płock have also included some provisions for the M&E of the attainment of their strategic objectives in their respective LDS but differ in their level of detail. In Międzyrzec Podlaski (rural) and Płock, the LDS include key performance indicators to assess whether objectives have been achieved or not. In addition, the municipalities prepare a detailed study of policy achievements every year and update the indicators based on the results of the study. This type of information is included in specific reports available online.⁸

Table 3.7. Examples of indicators included in the Katowice City Development Strategy

Strategic field: Transport and city logistics	Source of information
Strategic performance indicators	Department of Transport
Number of passengers using urban transport services	Department of Transport
List of cities directly connected with Katowice by urban transport	Department of City Development
List of voivodeships and foreign cities connected with Katowice by passenger railway transport	
Activity operational indicators	
Number of kilometres travelled as a result of rendered urban transport services	Department of Transport
Number of urban transport lines (inside and outside the city)	Department of Transport

Source: City of Katowice (2016^[10]), *City Development Strategy Katowice 2030*, https://www.katowice.eu/Documents/strategia_miasta_sklad_eng.pdf.

Kraków's LDS includes a catalogue of indicators, which are expected to measure the progress achieved in the implementation of individual goals. Table 3.8 presents some examples of those indicators that include where the city's status in 2016 and the expected result for 2030. The criteria for selecting the indicators was the availability of data which make it possible to measure regularly based on existing sources of information (i.e. public statistics, reporting activities of the city, regularly run social surveys).

Table 3.8. Examples of indicators referring to Kraków's Strategic Goals IV - "A city that is friendly to live in".

Indicator	The indicator measures:	Status in 2016 (%)	2030 (%)
Percentage of the area of Kraków with local spatial development plans	The extent of the Kraków area shaped by the LSGU by way of the spatial development plan	48.7	95
Accessibility to public green areas for residents	Percentage of persons living within 300 meters of green recreational areas	75 (2017)	86
Level of recycling	Residents' environmental behaviour, expressed as the percentage of waste sorted for recycling	33	Up to 50
Share of bicycle transport in the division of transport modes	Scope of bicycle use as residents' means of transportation	4.5	Range of 13-17
Fear of crime index	The level of residents' sense of security	14	Downward trend

Source: City of Kraków (2017^[11]), *Kraków Development Strategy - This is where I want to live - Kraków 2030*, <https://www.bip.krakow.pl/plik.php?zid=212318&wer=0&new=t&mode=shw>, p. 70.

Recommendations to strengthen strategic planning for local development

Poland is at a critical moment in the process of enhancing strategic planning for local development. The recent reforms to the Act on Principles of Implementation of Development Policy approved on 15 July 2020 seem to go in the right direction to build an integrated system of socio-economic and spatial development planning based on the accumulated experience in the elaboration of the LDS. However, the reforms beg the question of whether LSGUs, and in particular municipalities outside a FUA with low accessibility, have the capacity to implement those reforms. As Polish voivodeships, counties and municipalities continue to grow in terms of economic activity and population and given the need to make better investment decisions, particularly in the context of the COVID-19 pandemic, they have to improve their capacity and capability for strategic planning. The reforms will go a long way in modernising the strategic planning practice in LSGUs; nevertheless, Figure 3.6 suggests a number of recommendations to accompany the implementation of the recent reforms grouped into three main areas of action: i) design of the LDS; ii) capacity and consultation; and iii) financing and monitoring. It specifies the main actors involved and the timeline.

Figure 3.6. Strengthening Poland's practice of strategic planning for local development

Area of action	Recommendations	Main actors	Timeline
Designing the LDS	<ol style="list-style-type: none"> 1. Make compulsory the adoption and implementation of a LDS. 2. Redefine the scope of the LDS and create synergies across policy sectors. 3. Foster co-ordination and collaboration for data collection and sharing across and among levels of government. 4. Support LSGUs in improving the quality and practice of land use planning. 5. Improve the quality of the socio-economic diagnostic and land use plans. 	<ol style="list-style-type: none"> 1. NG 2. LSGUs 3. NG, LSGUs and SP 4. NG 5. LSGUs 	<ol style="list-style-type: none"> 1. Long-term 2. Short-term 3. Medium-term 4. Short, medium-term 5. Medium-term
Capacity and consultation	<ol style="list-style-type: none"> 1. Invest in professional management and specialist in local development. 2. Develop a central strategic capability team to develop and monitor the LDS. 3. Promote participatory process in the planning process. 4. Create local advisory bodies on stakeholders' engagement. 	<ol style="list-style-type: none"> 1. LSGUs and NG 2. LSGUs 3. NG and LSGUs 4. LSGUs (municipalities) 	<ol style="list-style-type: none"> 1. Medium-term 2. Short, medium-term 3. Medium-term 4. Short-term
Financing and monitoring	<ol style="list-style-type: none"> 1. Foster private investment in local development. 2. Build partnerships for financing the implementation of the LDS. 3. Adopt an investment approach for local development. 4. Reinforce the monitoring of the implementation of the LDS. 	<ol style="list-style-type: none"> 1. LSGUs and NG 2. LSGUs 3. LSGUs and NG 4. LSGUs and NG 	<ol style="list-style-type: none"> 1. Medium-term 2. Medium-term 3. Medium, long-term 4. Short-term

Note: NG: National government; LSGUs: Local self-government units; SP: Statistics Poland.
Short term: 1-3 years; Medium term: 3-5 years; Long term: over 5 years.

Recommendations for the national and/or regional levels of governments

Make the adoption and implementation of an LDS compulsory in the long term

The adoption of an LDS is a voluntary planning action, even after the recent reforms to the Act on Principles of Implementation of Development Policy. In the long term, once the amendments to the act begin to mature, Poland may consider reforming it to make the adoption and implementation of either an LDS or a supra-local development strategy compulsory for all LSGUs. However, this should take place only after the national government has created systemic opportunities (training and advisory) to prepare LSGU employees to plan and implement the development strategy in an appropriate way. Making strategic planning compulsory may help to ensure enforceability and strengthen the planning capacity of the country. Reform efforts would need to consider two aspects:

Grant sufficient flexibility to every municipality for the formulation of the LDS, allowing for innovation and creativity and the consideration of its particular context.

Reinforce capacity building for strategic planning across all municipalities. The bigger the municipality, the more thorough the LDS needs to be. This is because the challenges faced by larger municipalities tend to be more complex, while they also have more technical and financial capacity at their disposal.

Support LSGUs in improving the quality and practice of land use planning

The national government could adopt incentives and governance structures for municipalities to undertake planning based on FUAs, particularly in the light of the recent reforms to build supra-local development plans. The national government should consider ways to issue dedicated funding streams and/or regulatory measures such as common spatial plans. The national government could also promote strengthening the links among spatial, economic and sectoral plans at the local level both within and among municipalities. Joint indicators that assess and monitor actions over time can help to achieve this. The new Revitalisation Act (2015) is a promising first step to better integrating spatial and sectoral plans in targeted areas.

Recommendations for all levels of government

Foster co-ordination and collaboration for data collection and sharing across and among levels of government

LSGUs could:

- Sign a memorandum of understanding (MoU) or co-operation agreements for data collection and sharing among LSGUs as a way to ensure access to better quality and timely data. The MoUs or co-operation agreements could focus on data that is not collected and shared by Statistics Poland but that is important for the planning and evaluation of joint projects, investments and services.
- Consider the possibility of appointing a Chief Statistical Officer in the municipality or metropolitan area in charge of managing statistical needs and analysis.

Regions and counties could:

- Give priority to data collection for planning at the metropolitan or functional level as, so far, data have been collected following administrative boundaries. This is important for supporting the efforts of building supra-LDS.
- Ensure data is available to all LSGUs and the public at low or no additional cost, for effective local development decision-making.

The national government could:

- Issue guidelines with the support of Statistics Poland to ensure that data gathered by LSGUs is collected according to the highest standards and in a way that facilitates comparability and usefulness. This includes measures to protect the security of individuals and prevent data misuse.
- Issue directives with the support of Statistics Poland to ensure that data collected by voivodeships, counties and municipalities are disseminated and made available to other LSGUs and public bodies in a useful format.
- Ensure that public statistics, with the support of Statistics Poland, are kept updated and made available to the lowest possible levels (i.e. communes, event districts or neighbourhoods).
- Explore (fiscal) incentives for private actors to share their data with LSGUs for strategic planning. Alternatively, the national government could require each ministry, department or agency to make

its information available online in an open format and which could be retrieved, downloaded and searched by commonly used web applications.

- Support rapid dissemination of information related to sustainable development programming or smart cities, climate protection and energy to meet LSGUs information needs.

Invest in professional management and specialists in local development

An important factor for the success of LDS is the talent and experiences of the involved managers, local development specialists and outreach workers. To improve this, LSGUs could:

- Invest, with the support of regional and national levels of government, in training and skill development of staff in charge of the management of the LDS, as its implementation requires a particular set of skills and competencies. LDS staff is responsible for carrying out planning, resource allocation, partner brokering, technical guidance, monitoring, evaluation and feedback. Moreover, such personnel needs a large variety and high level of capabilities, including communication, administration, planning, networking and animation skills. They must also be capable of understanding the needs of local residents and establish credibility with them. They must demonstrate knowledge and skills to include residents in the planning and evaluation process.
- Recruit professional management and local development experts carefully to help prepare the LDS, mobilise citizens and private sector members and other organisations to develop and support appropriate initiatives, build partnerships and networks, and monitor and evaluate performance. This is of particular importance for the larger LSGUs.
- Include some elements of training and knowledge-sharing with local planners in the contracts of consultants when they are hired to prepare the LDS.
- Reinforce the financial skills of officials and employees. LSGU leaders rarely talk about the return on investment that their LDS and projects can offer to financiers. Moreover, local-level practitioners often lack technical skills such as project finance skills and strategic management assents.

The national government could:

- Put emphasis on continuous training to keep the staff's profile up to date, particularly in a context of frequent changes to the regulatory framework. It is also evident that hiring professional managers may be out of the reach of many LSGUs because of tight budgets and it may be that such skilled workers are not available in the local labour market. Therefore, focusing on continuous training of available staff is critical and has the advantage of building on their experience and knowledge of the local context.
- Request specialist institutions (i.e. universities) to assist LSGUs with the training of technical planners who could be sponsored, if allowed, by a national government studentship specifically focused on planning. Once again, agreements with universities and technical schools for financing could be reached with the support of the national government to fill that gap in the local public workforce. This could also serve to reinforce the financial skills of local officials and employees.

Promote inclusive participatory processes to ensure those affected by any planning decision have a role in the planning process

Poland's municipalities should strive to engage different social groups, such as women, the elderly, minorities, etc., that are more difficult to reach or those with traditionally low involvement profiles in strategic planning discussions (see recommendations on open government in Chapter 8). For that purpose, municipalities could:

- Ensure easy access to public information for all citizens through a wide range of means including information desks, meetings and interactive platforms to bring together the various actors involved in local governance.
- Foster the involvement of local NGOs in the organisation of consultative processes with different community groups, in particular with those generally excluded or not active enough in local development.
- Use participatory budgeting to encourage citizens' participation in local development so as to brainstorm, develop and vote proposals for development.
- Leverage the different accumulated experiences in different LSGUs on citizens' participation, particularly those from NGOs and support the dissemination of experiences.
- Ensure that the necessary budgetary and trained human resources are available to conduct public engagement processes. There should be dedicated officers to provide support and information about the process of strategic planning to ensure that people know how their views have been taken into account. Using communication experts or task force teams to communicate in simple language with the citizens would be relevant to incentivise participation.
- Manage the expectations of participants to maintain trust and commitment by making it clear to all stakeholders what outcomes are possible and what restrictions are in place upon decision-making.
- Promote participation of the private sector in strategic planning, ensuring that it is very focused, well defined and practical in nature (i.e. financing or implementation of plans), as part of steering groups looking at specific relevant issues (e.g. business development, cluster work, etc.).

The national government could:

- Issue guidelines on how to engage a wide range of stakeholders in participatory processes for strategic planning of local development. In particular, the guidelines could emphasise the participation of the most vulnerable residents such as women, the elderly, youth and children, disabled people, migrants and minorities.

Foster private investment in local development

Private investment can help LSGUs achieve more than what public investment based on local taxes alone can afford, especially in times of tight fiscal discipline, and mobilise resources that are not fully used to drive local development. For that purpose, LSGUs could:

- Make their LSGUs more investable by demonstrating how good returns can be made on investments in their territory by adopting measures to stimulate a strong deal flow of good quality propositions for financiers to evaluate.
- Consider how private and other funding will be attracted by the LDS and its implementation, how an investment will grow and how it will become sustainable without ongoing long-term public subsidy. LDS that include these kinds of considerations are much more likely to attract investment for their implementation and generate their own financial momentum to achieve their goals rather than just assuming that funds will be granted.
- Help the private sector find the means to finance the new generation of jobs and wealth creation activities.

The national government could:

- Assist through tax relief instruments coupled with more localised participation in financial instruments to improve returns or reduce risk and costs for private co-investors in local development projects.

Adopt an investment approach for local development

Poland's LSGUs could consider shifting from an expenditure approach for local development to an investment approach. This means that when establishing local economic strategies, LSGUs should take into account the factors that could attract and diversify funding, particularly from the private sector. Local authorities and planners need to recognise the need to build business enthusiasm for local development and foster mechanisms which bring the internal rate of return of key initiatives together with their external performance in policy terms. This implies sharing costs and risks with external actors such as the private sector and revising organisational arrangements. For that purpose, LSGUs could:

- Develop local economic plans that support the design and implementation of the LDS. This would require identifying significant local projects and interventions that would form part of an LDS and assess how the LSGU can finance or co-finance them.
- Build collaboration with the local private sector to make reinvestment in local development more sustainable in the long term.
- Consider how public assets (i.e. land, buildings, infrastructure, logistics, amenities, among others) could be better managed to attract private investment to finance LDS or supra-local development plans.
- Produce a business plan and investment plan for each key intervention to enable easy and effective appraisal of the likely financial returns available. This could be feasible for metropolitan projects based on a supra-LDS.

The national government could:

- Put in place new arrangements for fiscal decentralisation and strengthen LSGUs' fiscal and financial capability by exploring local fiscal and longer-term investment tools, foster mechanisms for regional fiscal collaboration, create PPPs that include voivodeship and municipal governments and explore new financial tools for local development.
- Consider using the tax system to provide a different incentive structure for place-based investment, exploring how public assets can be used to nurture or attract private co-investment. Poland may wish to explore mobilising innovative financing tools such as borrowing, land value capture mechanisms and infrastructure funds to finance investment.

Reinforce the monitoring of LDS implementation

The policies in the LDS constitute the primary mechanism for delivering the LSGU's spatial vision and strategic objectives. LSGUs could develop indicators related to spatial development objectives, which require periodic monitoring, reporting and evaluation, as already done in some municipalities such as Kraków. Such information will assist LSGUs in tracking progress in meeting their vision for sustainable development and constitutes an important communication tool with residents.

LSGUs could:

- Structure what steps the monitoring process of the LDS should include. For monitoring the implementation of the LDS, local authorities may conduct the following tasks: i) review the progress of the LDS against the timeline of activities and milestones set in the planning document; ii) assess the extent to which policies and programmes in the LDS are being implemented; iii) where policies or programmes are not being implemented, explain why and propose solutions; iv) identify the significant effects of implementing policies within the LDS and whether they were intended; and v) set out whether policies or programmes should be amended or replaced.
- Include a performance measurement strategy as part of the LDS. There are at least three components that LSGUs may need to include in the performance measurement strategy: i) an appropriate data-gathering strategy using M&E tools (i.e. specific, measurable, achievable,

relevant and time-bound [SMART] indicators); ii) identify data sources, frequency of data collection and reporting as well as persons responsible for monitoring; and iii) formulate an M&E plan. Clear information should at least be obtained on expenditure, activities and outputs in order to evaluate costs and benefits.

- Include an exploration of the benefits of partnership in the evaluation. The aim would be to analyse whether the partnership structure is leading to the desired outcomes and whether changes in the partnership are required. Evaluation may include consideration of what the LSGU may be able to achieve by acting alone rather than in a partnership.

The national government could:

- Build capacity for the development of monitoring indicators. The national government, together with the academic sector, could set up training and mentoring programmes for LSGU officials to understand the concept, definitions and standards for M&E. This is key to help mostly smaller LSGUs, which may face specific challenges in attracting staff with the required competencies. Managers and planners will require particular support and mentoring as they have a role in promoting, approving and communicating the results. This capacity building can support the development of an appropriate data collection system and related performance indicators.

Polish LSGUs must be aware of the risks and limitations related to placing excessive emphasis on short-term outputs, particularly economic ones. While economic outputs are important, they are only one of the objectives of the local development policy. Most of the time, they are dependent on overcoming social and capacity barriers before endogenous development and structural adjustments can be released in the long term. It is therefore critical that LSGUs develop criteria for evaluating programmes, which should guide *ex ante*, interim and *ex post* evaluation.

Recommendations for all LSGUs

Redefine the scope of the LDS and create synergies across policy sectors

In their LDS, municipalities often try to cover all policy priorities and implement them in a short period. LSGUs could:

- Redefine the scope of the LDS by reflecting on: which sectors form the local economic base and account for most jobs and growth; what parts of the local economy are growing more rapidly and which ones are declining; which parts of the economy are the most important; what are the development trends and how can they be projected into the future; and how are different urban policy domains like transport, housing and amenities included in the LDS. This could be the basis for creating synergies across policy sectors for development.
- Recognise that a self-generated process of growth is unlikely to be achieved by acting on one sector alone. Each activity should be regarded as part of a comprehensive process and strategy within which activities are linked. Katowice, for example, appointed a co-ordination team and the implementing team integrated by different city hall departments to exchange information and agree on needs as part of the local revitalisation programme. This measure is not included in any regulation but was integrated into their local sectoral programmes as an effort to foster co-operation and co-ordination within the administration.

Strengthen land use planning across all LSGUs

LSGUs should strive to expand the coverage of their local spatial development plans. Reliance on the planning decision mechanism should be reduced in the short term and eliminated in the longer term. To manage spatial issues more effectively, LSGUs, in particular municipalities, should employ a broader range of tools such as fiscal ones. The 2015 Revitalisation Act allows municipalities to use an adjacency levy

and expanded real estate tax in designated areas in order to better capture increase in land value resulting from public investments. Municipalities should increase their use of this possibility.

Some limits should be introduced to limit the compensation paid to owners if they are negatively affected by a local spatial development plan as this practice is inhibiting the adoption of new plans. For example, municipalities can reduce the timeframe in which owners can apply for compensation, which is currently unlimited. Further, the way that the property tax is calculated (based on land and building size/area) is inefficient and can encourage land speculation. LSGUs could shift to *ad valorem* property taxation to reap the benefits of a rise in land values when local infrastructure investments are made.

Improve the quality of the socio-economic diagnostic and land use plans

Any effective LDS requires a sound background socio-economic study and land use plans to reflect the current level of development of any locality and facilitate evidence-based decision-making. For that purpose, LSGUs could:

- Create inter-departmental task forces (sometimes called project teams or working groups) (see recommendations on intra-LSGU co-ordination in Chapter 2) to elaborate or supervise the development of socio-economic diagnostics. This could foster co-operation and joint work and in turn increase the quality of the diagnostic. This would also allow involving the widest possible range of skills and disciplines available in the local public workforce in the production of the diagnostic. Although OECD work suggests that there are no definitive rules about how this can be done, it has found out that – at a minimum – a baseline study (or in this case a diagnostic) should give an overview of the municipality regarding demographics, economy and environment updated on a regular basis – every three to four years. It should highlight the competitive advantages of the municipality. The links between spatial planning and demographic, socio-economic and fiscal analysis and forecasting should be strengthened.
- Consider hiring external assistance for the elaboration of the socio-economic diagnostic and land use plans in LSGUs with a small administration.

Develop a central strategic capability team in LSGUs to develop and monitor the LDS

The central strategic capability team could consist of a few experts and a support team. This will vary depending on the administrative capacity level of each LSGU. Large LSGUs may probably require a strategy/planning expert, a communications specialist and some research and administrative support. This could build on the experience of some LSGUs and voivodeships. For example:

- In Katowice, a co-ordinator for strategy implementation and M&E was appointed – a role normally assumed by the development department. This co-ordinator is responsible for updating the LDS. In the context of M&E, he/she is responsible for gathering, analysing and evaluating information delivered by different departments.
- In the Dolnośląskie Voivodeship, the LDS is contemplating the integration of a Coordinating Committee for the Development Strategy of the Lower Silesian Voivodeship 2030, integrated by members of the marshal office, the Regional Development Policy and Economy Commission of the regional parliament, directors of selected divisions of the marshal office and representatives from the groups of all LDS implementation projects. The committee co-operates with the Regional Development Policy Committee of the Voivodeship Council Assembly and with representatives of work teams related to LDS.

Create local inclusive advisory bodies on stakeholders' engagement

Depending on the level of interest and participation in each municipality, authorities could:

- Consider formalising and publicising the participation process with the creation of local advisory bodies/committees. One of the local advisory committees could comprise representatives of the following groups: entrepreneurs, social associations, young people, senior citizens, etc. This may be more feasible in the case of metropolitan areas for the design and implementation of supra-LDS.
- Define the tasks of the advisory body, which could be to: provide assistance to the LSGU council when formulating public policy and conducting strategic planning; give the community a forum for discussion in greater depth; provide a more thorough review of complex and significant matters; review the existing planning documents through a SWOT analysis; and provide expertise without using budget funds, among others. It could also be in charge of organising open events (such as conferences, public discussions, etc.) as part of the planning process, which could be conducted online during the COVID-19 pandemic.
- Ensure that these bodies are manageable, adequately staffed and serve a useful purpose. They should be provided with autonomy but remain strongly linked with the administration as the local council, on the recommendation of the mayor, could appoint members of the body. They should report directly to the entire council and mayor. It is essential that these bodies are not seen as shadow governments but as mediating instruments between political decision-makers and citizens. While it will be up to the local council, or mayor, to take the final policy decisions, they will be committed to providing the reasons for their decisions in these advisory bodies.

Build partnerships for financing the implementation of the LDS

Poland's LSGUs need to build a new relationship with the private sector and non-governmental as well as civil society organisations to ensure progress on local development, as they can contribute to the design and implementation of the LDS. Local authorities need to leverage private co-investment that can add important elements that are otherwise absent, such as additional project proposals, resources and competencies. Financing an LDS is not just about setting up a PPP but also looking for more advanced means to share risks, costs, returns and the stewardship of assets. For the partnerships to be more effective within the framework of the LDS, the following actions can be taken with support from the national government:

- Establish an umbrella partnership that can be tasked with a greater role in the design and implementation of the strategy and even contribute to the search for adequate funding.
- Provide regular opportunities for organisational development and specialised training for the partnership and its partners.
- Open channels of communication for bottom-up inputs such as proposals from citizens or NGOs.
- Recognise local diversity in the policy process as well as the value of evidence.

Certainly, partnership models will vary according to the different conditions of every LSGU, depending on the characteristic of the problems, institutional environment, political factors and experience. LSGUs can encourage more public and private investment in local development by facilitating:

- PPPs in the forms of contracts, leases and joint ventures.
- Tax based incentives, credits and reinvestment mechanisms.
- Participation of public funds in financial engineering.
- Use of public assets to encourage investment.

Debt financing or other investment arrangements.

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Notes

¹ For further information, see <http://www.oecd.org/economy/poland-economic-snapshot/>.

² For further information, see <https://migrationobservatory.ox.ac.uk/resources/briefings/migrants-in-the-uk-an-overview/> and http://www.cpc.ac.uk/docs/2009_WP3_New_Polish_Migration_to_the_UK_Trevena.pdf.

³ For further information, see <https://isap.sejm.gov.pl/isap.nsf/DocDetails.xsp?id=WDU20200001378> (in Polish).

⁴ This change will come into effect on 13 November 2020. For further information, see http://orka.sejm.gov.pl/proc9.nsf/ustawy/64_u.htm.

⁵ There is the possibility that respondents to the OECD questionnaire understood the question as referring to the resources needed for implementation but the interviews for this study confirmed that one of the challenge to elaborate the LDS is the lack of financial resources.

⁶ For further information, see <https://ec.europa.eu/social/main.jsp?langId=en&catId=1246&newsId=9104&furtherNews=yes>.

⁷ For further information, see <https://www.power.gov.pl/nabory/1-142/>.

⁸ For further information, see <https://katowice.eu/dla-mieszka%C5%84ca/strategie-i-raporty/raport-o-stanie-miasta/raport-o-stanie-miasta-2019>.



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