



Job Creation and Local Economic Development 2020: Rebuilding Better examines the impacts of COVID-19 on different types of local labour markets. It also considers their performance prior to the pandemic, and how COVID-19 could impact other ongoing local labour market transitions such as digitalisation, automation and the polarisation of jobs. Finally, it discusses the role local actors will play in rebuilding better. Consult the full publication [here](#).

Poland¹

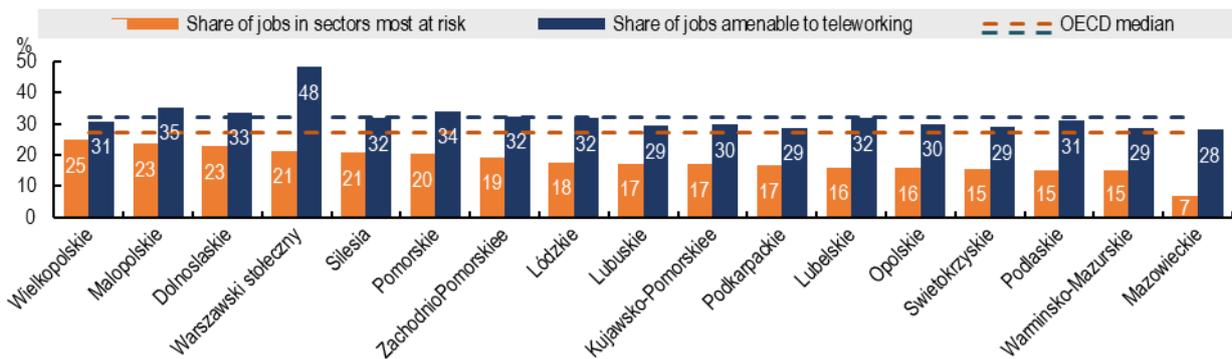
The share of jobs in sectors most at risk from COVID-19 is lower than the OECD median region across Poland, but varies from 7% in Mazowieckie to 25% in Wielkopolskie.

All regions in Poland except for Warszawski stołeczny have a higher share of jobs at high risk or risk of significant change from automation than the OECD median region.

All regions saw the share of middle-skill jobs decrease between 2000 and 2018. In Lubelskie alone, this represents a net loss of almost 200 000 middle-skill jobs.

The potential impacts of COVID-19 on local labour markets

Jobs in sectors most at risk and amenable to teleworking



Note: Share of jobs at risk is based on estimates of sectors most impacted by strict containment measures, such as those that involve travelling and direct contact between consumers and service providers. The sectoral composition of the regional economy is based on data from 2017 or latest available year. Share of jobs amenable to teleworking is based on the types of tasks performed in different occupations, and the share of those occupations in regional labour markets. These figures do not account for gaps in access to IT infrastructure across regions, which could further restrict teleworking potential. The OECD median presented here is the median of OECD regions with available data for each indicator.

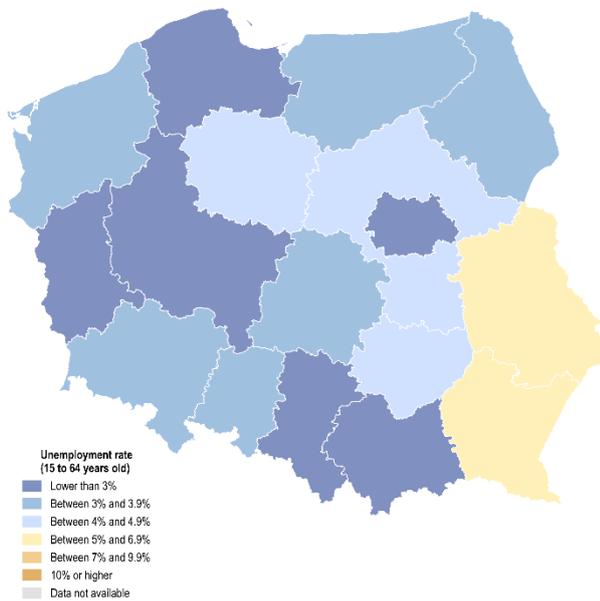
Source: OECD calculations on OECD (2020), "Regional economy", *OECD Regional Statistics (database)*, <https://doi.org/10.1787/6b288ab8-en>; and OECD (2020), *OECD Regions and Cities at a Glance 2020*, <https://doi.org/10.1787/959d5ba0-en>.

COVID-19 has put unprecedented pressure on local labour markets and economies. The share of jobs in the sectors most at risk from containment measures (e.g. accommodation and food services, and wholesale and retail trade) varies from less than 15% to more than 35% across OECD regions. In Poland, disparities between regions are relatively large: the share of jobs in sectors most at risk ranges from 7% in Mazowieckie to 25% in Wielkopolskie. All regions had a lower share of jobs at risk than the OECD median region.

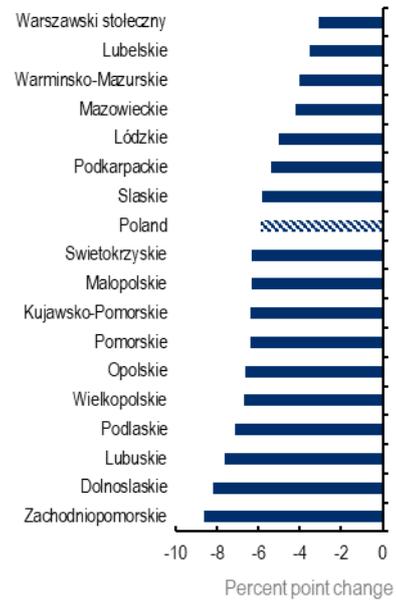
While containment measures have restricted economic activity in some sectors, the rapid expansion of teleworking has helped maintain other jobs. Widespread teleworking is more feasible in some regions than others -- the share of jobs amenable to teleworking varies roughly 20 percentage points across regions, from 28% in Mazowieckie to 48% in Warszawski stołeczny. In almost two-thirds of Polish regions, the share is close to or lower than the median OECD region.

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Unemployment rate, 2019



Change in unemployment rate, 2010-2018

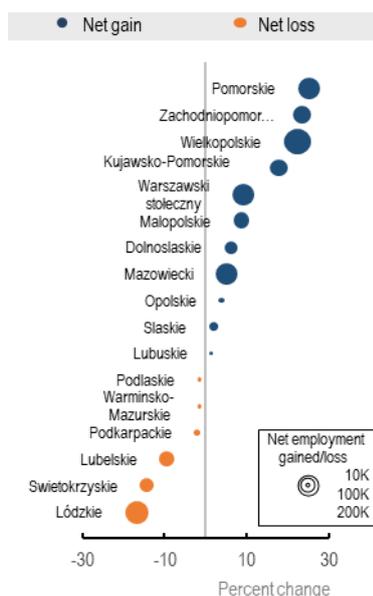


Note: The unemployment rate is computed as the share of unemployed people over the labour force, for the age group 15-64.

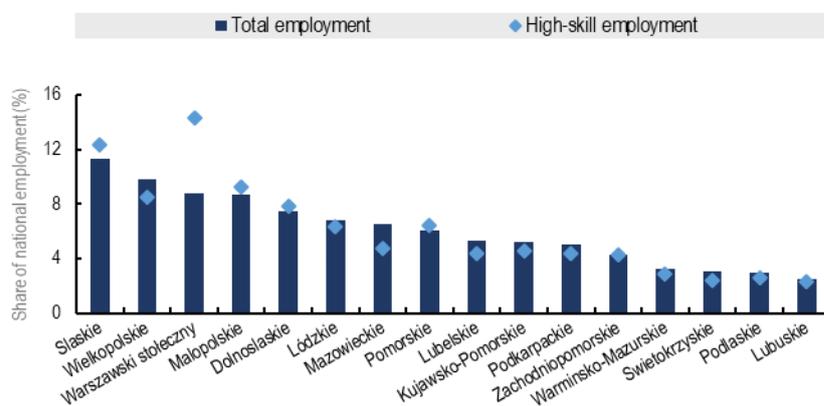
Source: OECD (2020), "Regional labour markets", *OECD Regional Statistics (database)*, <https://doi.org/10.1787/f7445d96-en>,

Prior to the COVID-19 pandemic, unemployment rates in the Poland were generally low, but varied over two-fold across regions, from a low of 2.1% in Lubuskie and Warszawski stołeczny to a high of 5.6% Lubelskie. Looking at the decade following the 2008 crisis, all regions had unemployment rates lower in 2018 than in 2008, a pattern seen in one-third of OECD countries. Regional gaps in unemployment also shrank over this period, thanks to relatively larger declines in the regions with the highest rates in 2008. For example, the unemployment rate decreased by 8.6 percentage points in Zachodniopomorskie, which had the highest unemployment rate in 2008.

Change in net employment, 2010-2018



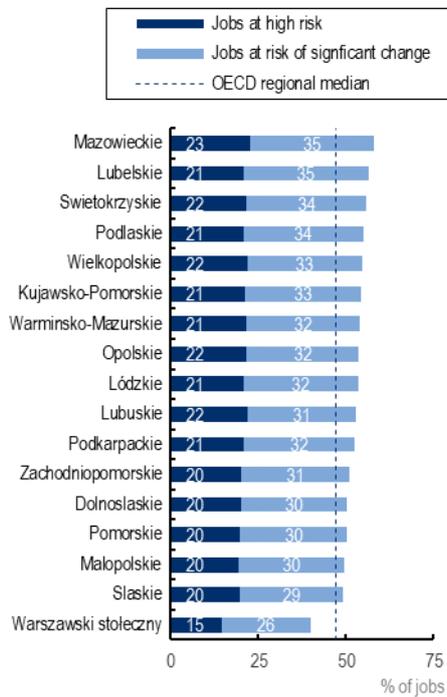
Employment by region and skill level, 2018



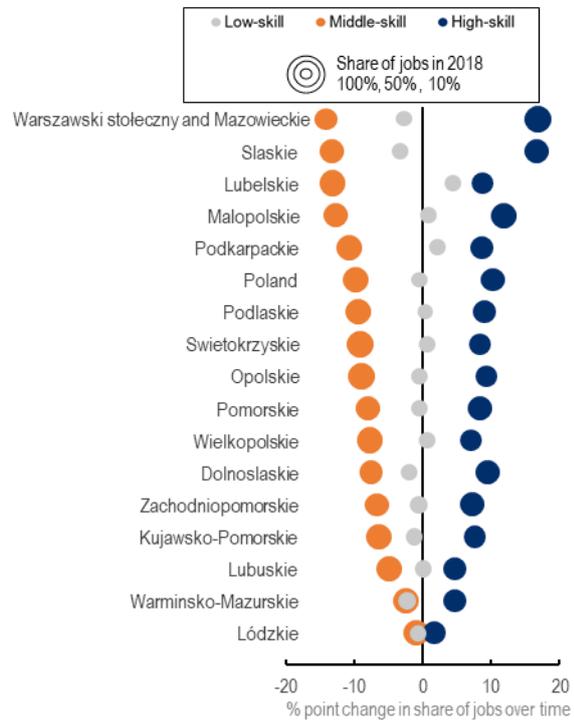
Source: OECD (2020), "Regional labour markets", *OECD Regional Statistics (database)*, <https://doi.org/10.1787/f7445d96-en>, OECD calculations on Eurostat (2020), Eurostat regional labour markets and EU Labour Force Survey.

In about two-thirds of regions, the number of people employed grew between 2008 and 2018 Wielkopolskie was responsible for around 30% of net employment growth over this period. In 2018, however, Slaskie accounted for the greatest share of employment (11%), while Warszawski stołeczny accounted for the greatest share of high-skill employment (14%) Looking at a longer time period (2000-2018), the geographic concentration of jobs (as measured by the number of people employed) increased in Poland, but more strongly for high-skill jobs than jobs in general. However, this data should be interpreted with caution as a change in the regional classification over the period of analysis could impact the results.

Share of jobs at risk of automation, 2018



Job polarisation, 2000-2018



Note: In Panel A “high risk” refers to the share of workers whose job faces a risk of automation of 70% or above. “Significant risk of change” reflects the share of workers whose job faces a risk of automation between 50% and 70%.

In Panel B, high-skill occupations include jobs classified under the ISCO-88 major groups 1 (legislators, senior officials, and managers); 2 (professionals); and 3 (technicians and associate professionals). Middle-skill occupations include jobs classified under the ISCO-88 major groups 4 (clerks); 6 (skilled agricultural workers); 7 (craft and related trades workers); and 8 (plant and machine operators and assemblers). Low-skill occupations include jobs classified under the ISCO-88 major groups 5 (service workers and shop and market sales workers); and 9 (elementary occupations).

Source: OECD calculations based on Survey of Adult Skills (PIAAC) (2012); and EU Labour Force Survey; Nedelkoska, L. and G. Quintini (2018), “Automation, skills use and training”, <https://doi.org/10.1787/2e2f4eea-en>; and OECD (2020), *OECD Employment Outlook 2019: The Future of Work*, <https://doi.org/10.1787/9ee00155-en>.

COVID-19 will likely accelerate automation, putting additional pressures on places with relatively high shares of jobs at risk. All regions in Poland except for the Warszawski stoleczny have a higher share of jobs at high risk or risk of significant change from automation than the OECD median region. The share of jobs at risk ranges from 40% in Warszawski stoleczny to 58% in Mazowieckie.

Following general OECD patterns, in Poland, all regions saw the share of middle-skill jobs decrease between 2000 and 2018. The share of middle-skill jobs decreased by 10 percentage points or more in Podkarpackie, Malopolskie, Lubelskie, Slaskie, as well as the Warszawski stoleczny and Mazowieckie region.² In Lubelskie Province alone, this represents a net loss of almost 200 000 middle-skill jobs. In all regions, decreasing shares of middle-skill jobs were predominantly offset by increasing shares of high-skill jobs.

Active labour market policies: institutional arrangements

Active labour market policies will be of growing importance as the COVID-19 response moves from emergency supports to facilitating labour market transitions. The institutional arrangements for these policies, and the role of subnational governments, varies significantly across countries.

	<i>Centralised, including branch offices of national ministry / agency</i>	In 1999, the Public Employment Services in Poland were decentralised. At the national level, the Ministry of Family, Labour and Social Policy is responsible for the legislative framework, national strategy, managing the Labour Fund, and financing active labour market policies. Regional labour offices, part of regional governments (voivodeship) are responsible for analysis, strategic planning, and services for specific groups. Poviats labour offices, part of local governments at the district level (powiat) are responsible for providing benefits to unemployed persons and implementing active labour market policy instruments.
X	Decentralised to subnational governments	
	<i>Fully outsourced or delivered through network of public, private, and/or non-profit providers</i>	
	<i>Combined system with shared competences, or different systems for different target groups</i>	

Source: OECD (forthcoming), "Local and regional variations in labour market and skills policies: A cross-country comparison", *OECD Local Economic and Employment Development (LEED) Papers*; and OECD (2016), *Employment and Skills Strategies in Poland*, OECD Reviews on Local Job Creation, <https://doi.org/10.1787/9789264256521-en>.

Notes

¹ Data is presented at the TL2 level, which typically corresponds to the first administrative tier of subnational government. See Reader's Guide of the full report for more information on the methodologies behind the calculations.

² Given reforms to regional classifications in Poland over the time period analysed, Warszawski stołeczny and Mazowieckie are combined for the polarisation analysis to ensure comparability over time.