

Synthesis Assessment I

FOR POLISH MUNICIPALITIES LOCATED IN
FUNCTIONAL URBAN AREAS



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1. Introduction

Within the framework of the Better Governance, Planning and Services in Local Self-Governments in Poland project, the OECD provides an analysis of local policy and practice in key thematic areas of good public governance and territorial development. Consequently, the primary focus and target audience of the resulting report are Poland's 2478 municipalities (gminas in Polish). Due to the large diversity among these municipalities and the considerable differences between their respective situations and related challenges, the OECD's assessment provides a greater level of granularity, by distinguishing between different types of municipalities based on measurable characteristics that can help identify particular challenges and opportunities.

For the purpose of a more granular assessment that sheds light on municipal development and capacity across types of municipalities sharing similar characteristics and local development challenges, the OECD has developed a classification of Polish municipalities that differs from the pure administrative definition of municipalities. The functional typology classifies municipalities according to their geographic location (inside and outside Functional Urban Areas, for a definition see Box 1), their population size, and their degree of accessibility to population settlements. It distinguishes between three types of municipalities, namely:

- municipalities located inside of Functional Urban Areas (FUAs),
- municipalities located outside of FUAs with high accessibility, and
- municipalities located outside of FUAs with low accessibility.

Box 1. Delineating functional urban areas (FUAs)

The European Union and the OECD have jointly developed a methodology to define FUAs, which consists of cities and their commuting zones in a consistent way across countries. A FUA can be defined in four steps:

1. Identify an **urban centre**: a set of contiguous, high density (1 500 residents per square kilometre) grid cells with a population of 50 000 inhabitants in the contiguous cells.
2. Identify a **core of the FUAs**: one or more local units that have at least 50% of their residents inside an urban centre.
3. Identify a **commuting zone**: a set of contiguous local units that have at least 15% of their employed residents working in the core of the FUAs.
4. A **FUA** is the combination of the city with its commuting zone.

The EU-OECD FUA definition ensures that the most comparable boundaries are selected. It does this by first defining an urban centre independently from administrative boundaries. As a second step identifies the administrative boundaries that correspond best to this urban centre. In this way, it ensures that central Paris is compared with all of London or Berlin.

Source: OECD/EC (2020^[15]), *Cities in the World: A New Perspective on Urbanisation*, <https://doi.org/10.1787/d0efcbda-en>.

Table 1 presents an overview of the distribution of Polish municipalities and population per type. By shifting from the traditionally administrative, political and historic classification to one that is based on geographic location and economic criteria, the OECD's typology allows to better identify municipalities based on measurable economic characteristics, capture the commonalities among groups of municipalities, and to differentiate between different types of rural municipalities. For more information on the methodology behind the OECD regional classification and the alternative OECD municipal typology for Poland, please refer to the introduction of the full report.

Table 1. OECD territorial classification for municipalities in Poland

Distribution of municipalities and population per OECD typology in 2018

Municipal (gminas) classification	Number of municipalities (2018)	Share over total municipalities (%)	Population (2018, millions)	Population (%)
In FUA big	161	6	15.97	41.6
In FUA small	592	24	5.48	14.3
Out FUA high access big	154	6	4.91	12.8
Out FUA high access small	1 204	49	9.11	23.7
Out FUA low access	367	15	2.94	7.7
In FUA (sum)	753	30	21.4	56
Out FUA (sum)	1 725	70	17.0	44

Note: The table presents data by 15 November 2018 (there are annual changes in the number of municipalities by type).

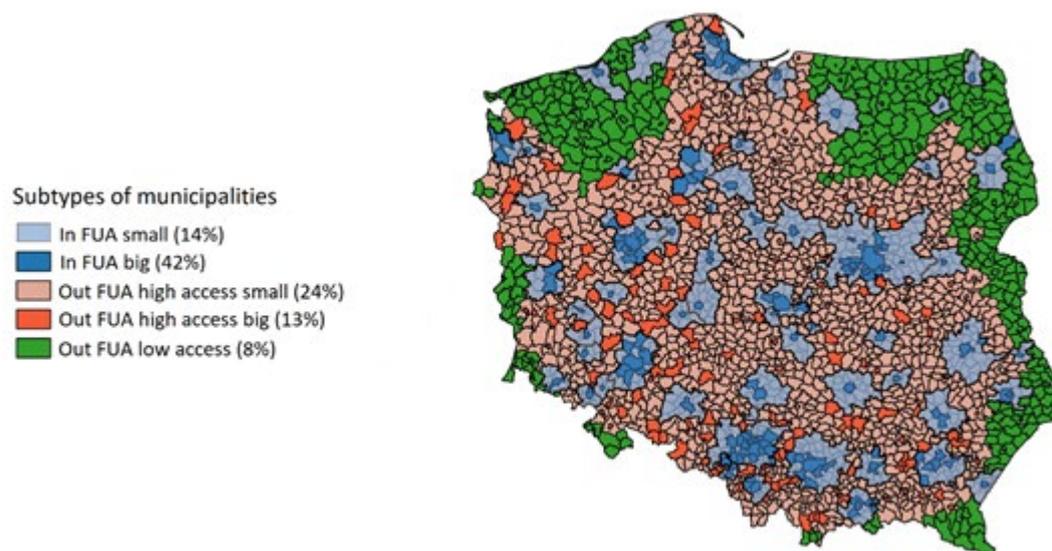
Source: Authors' own elaboration based on the population and number of municipalities from Statistics Poland (2020_[21]), *Regional Statistics*, <https://stat.gov.pl/en/regional-statistics/> (accessed on 15 November 2020).

Following the OECD's functional typology, this synthesis assessment focuses on large and small municipalities that are located within Functional Urban Areas. Figure 1 provides an overview of the geographic dispersion of these municipalities according to the typology. By drawing from the eight thematic areas of the Better Governance, Planning and Services in Local Self-Governments in Poland Report, it provides a more targeted assessment of municipal development and capacity for this particular type of Polish municipalities. In some cases, governance issues are determined to a greater extent by national legislation, instead of individual municipal performance. For these cases, it is more important to differentiate between municipalities of different sizes. This is the case, notably, for governance issues regarding budgeting and human resources management. When the analysis differentiates by size instead of the three types of municipalities developed by the OECD, it will be explicitly mentioned.

This document follows the structure of the main OECD report. The first part summarises the most important findings of the report for each of the themes and amends them with some type-specific assessment. The recommendations for the type of municipalities located within FUAs are presented at the end.

Figure 1. OECD classification of municipalities in Poland

Municipalities by types and share of population across the territory of Poland, 2018



Source: Authors' own elaboration based on OECD (2020_[17]), "Metropolitan areas", <https://doi.org/10.1787/data-00531-en>; OpenStreetMap; Polish State Railways (PKP); International Transport Forum air model.

2. Strengths and challenges for local self-government development

Municipalities inside FUAs account for 30% of all Polish municipalities, but concentrate most of the country's population (55.9%). These municipalities have boosted the economic growth in the country, attracting an increasing number of businesses and people. Yet, growing urbanization and an aging population also pose challenges for sustainable development for these municipalities. As the OECD questionnaire indicated, the transition to a low-carbon economy is a priority for these municipalities, and the challenges this presents are coupled with other necessary investments, such as infrastructure development and air quality improvement. Therefore, effective planning and co-ordination between different levels of public authorities is essential to continue unlocking growth opportunities and addressing the challenges faced by these places.

There exist divergent demographic trends between large and small municipalities inside FUAs. Large municipalities within this type concentrate most of the national population (42%), and their share of elderly population¹ is the largest in the country (26% in 2018) (Statistics Poland, 2020_[11]). Moreover, they register the fastest trend of ageing population. In contrast, since 2000, small municipalities inside FUAs have experienced the largest population growth in the country (0.5% per year), driven mainly by the inflow of people from other municipalities, standing out as the net receivers of population in Poland (a total net migration of 1.9% of the population in 2000-18). These small municipalities also benefit from the lowest share of elderly population (20%) and the highest proportion of young population in the country (Statistics Poland, 2020_[11]).

Municipalities inside FUAs concentrate the greatest economic prosperity in Poland. They have experienced the highest economic and business growth in the country, a trend that can be explained in part by the greater specialisation in high value-added services and the concentration of labour with a higher level of education. They also benefit from the lowest unemployment rates (especially large municipalities) and the highest proportion of business establishments (66%) in Poland (Statistics Poland, 2020_[11]). The

smaller municipalities hold the greatest growth of business establishments (26.4% for 2009-18) in the country, well above the figure for large municipalities (17.5%) (Statistics Poland, 2020^[11]).

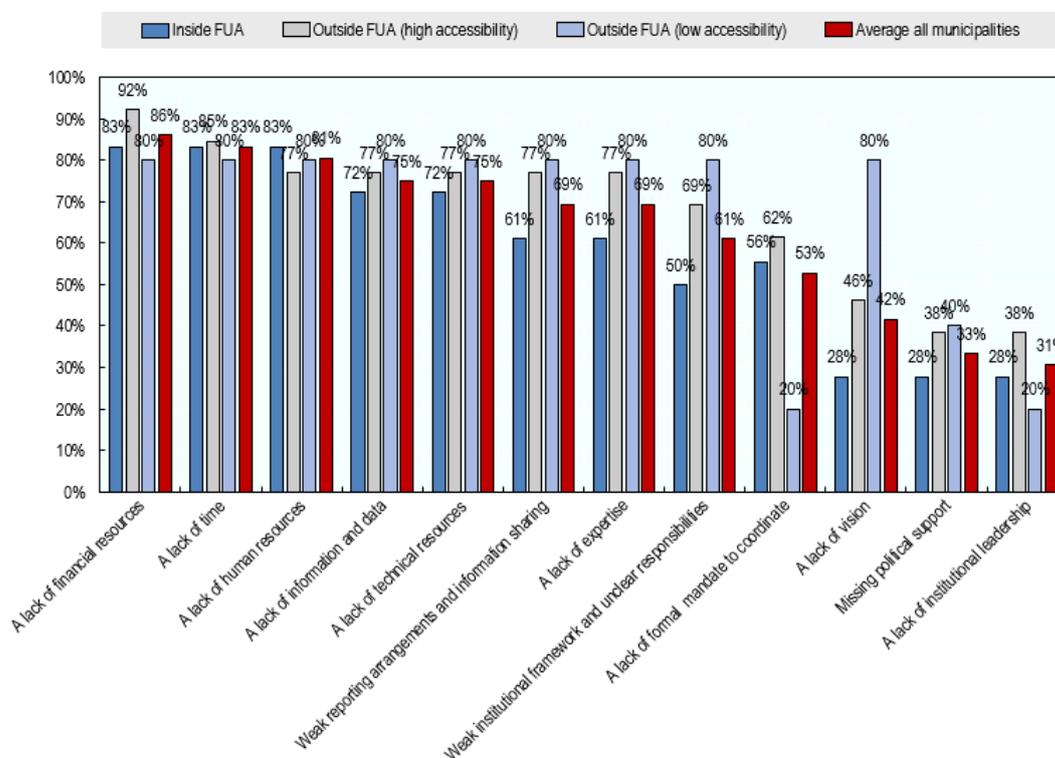
However, the growing urbanisation process has brought a number of challenges, including pollution and a lack of housing availability. According to the OECD questionnaire, green growth has now become a high priority for local authorities, which outlines the relevance of managing negative environmental effects caused by increasing density in cities. Furthermore, the large share of aging population in large municipalities inside FUAs also requires especial attention, as it can lead to a lower availability of labour force and dwindling local tax levels, which in turn translates into growing pressure on municipal (financial and administrative) capacity to deliver healthcare services for the population. Regarding these municipalities' economic perspective, the performance of this group is high compared with the national average, but the picture looks different when it is compared internationally. The productivity of Polish FUAs is still far below the average of OECD countries and the contribution of medium-sized/small FUAs to the national economy remains relatively low compared to the OECD average (OECD, 2020^[21]).

To address these challenges of municipalities inside FUAs, local self-governments units require forward-looking planning to tackle the effects of an increasingly concentrated population. Lack of housing affordability, large commuting times and pollution can all be mitigated through greater co-ordination within and between governments (e.g. in areas such as land use, investments etc.). These demographic trends also call for long-term planning, including multi-annual budgets, for efficient service delivery. Large municipalities must plan for a growing population of elderly people, while small municipalities must ensure a young population, find attractive places to live and have opportunities to join the economy. It is a set of challenges and opportunities that should not be seen individually but as an interrelated whole. Addressing them in a co-ordinated manner and with effective policies may lead to a positive impact on the well-being of citizens.

3. Co-ordination across administrative units and policy sectors within municipalities

Co-ordination is not an end in itself, but can be seen as a tool for the creation of better policies and services for citizens. In addition to the Local Development Strategy (LDS), municipalities in Poland engage in the delivery of multiple services and various planning activities focused on inter alia land-use, housing, and mobility. However, the design and implementation of policies and services often face challenges such as different planning horizons, internal contradictions, duplication or a lack of funding. Furthermore, planning documents at the local level may or may not be aligned with regional and national strategies. Co-ordination across different units and sectors within municipalities is therefore a means to enhance the coherence and effectiveness of policy and service design and delivery. In response to the OECD questionnaire, local self-governments across Poland ranked a number of challenges they are facing with regard to effective co-ordination (Figure 2). Similar to other types, municipalities located within FUAs see a lack of capacities and resources as the biggest challenge for effective co-ordination. A clear majority reports a lack of financial resources (83%), a lack of time (83%), and a lack of human resources (83%) as main challenges. Similarly, a lack of technical resources (72%) and a lack of expertise (61%) are seen as challenging for more than half of the municipalities located within FUAs. A majority of surveyed municipalities in this type also highlights the need for institutionalisation with clear roles and responsibilities. Weak reporting arrangements and information sharing (61%), a lack of information and data (72%), a weak institutional framework and unclear responsibilities (50%) as well as a lack of formal mandates are cited as major challenges for co-ordination. Compared to other types, a lack of vision, missing political support, and a lack of institutional leadership are reported less frequently by municipalities inside FUAs.

Figure 2. Main challenges for effective co-ordination across administrative units and policy sectors in Polish municipalities



Note: Based on 36 municipality responses to the OECD questionnaire (n=36),

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

In municipalities located inside FUAs, the responsibility for co-ordination is even more centralised than in the average of Polish municipalities. The mayor (94%) and the municipal secretary/director or chief executive officer (94%) are reported to be most regularly involved in co-ordination matters and often assume key co-ordination functions. As the highest municipal authorities, they are key for providing vision, leadership, legitimacy and the necessary resources to foster the overall co-ordination of policies and services across the municipality. A high degree of centralisation and personalisation may however also lead to dependency and a lack of co-ordination if these actors do not feel responsible, lose political legitimacy or do not have the capacity to effectively perform their coordinative role. In addition, the treasurer participates in co-ordinating policy-making and service delivery in 76% of municipalities within FUAs. Compared to the other types, additional actors such as the heads of departments and key departmental staff play a less prominent role for co-ordination in this group.

Providing institutions tasked with co-ordination with strong mandates can help ensure effective intra-governmental co-ordination as they provide clarity of roles and create the necessary legitimacy vis-à-vis other actors. According to the OECD questionnaire, more than half of the municipalities inside of FUAs (59%) provide institutions/departments regularly involved in co-ordination with a formal mandate. They are moreover the type of municipalities that reports the highest use of formal reporting arrangements for the implementation of action plans and local development strategies and the highest level of codification in laws and regulations. However, even though they are used more frequently than in other types, currently only 38% of municipalities within FUAs enshrine formal reporting arrangements in laws or regulations and a majority (56%) bases its reporting arrangements on informal tradition. Such an informal approach offers

flexibility and involves low transaction costs, but also significantly depends on staff continuity, personal relations, and trust.

Policy documents including references to co-ordination (e.g. local reform plans and development strategies) can further raise awareness of the importance of intra-municipal co-ordination and may offer guidance and clarity to public servants. While most Polish municipalities have not yet enacted such a policy document with references to co-ordination, 41% of the municipalities within FUAs (23% of all municipalities) report having documents that focus on co-ordination in planning, service-design and delivery across different policy sectors. Besides the inclusion of co-ordination references in high-level policy documents, one-third (33%) of municipalities within FUAs has developed specific written guidance for staff in the form of rules documents, manuals or guidelines that can concretely assist policy-makers in co-ordinating. In addition, training can help staff to develop the skills and competences needed for effective co-ordination.

Across Poland, municipalities have a range of institutional mechanisms at their disposal for improving intra-LSGU co-ordination. They include permanent or temporary task forces/working groups and councils/committees that meet on an ad hoc or regular basis. All municipalities within FUAs that responded to the OECD questionnaire reported the use of task forces to deal with co-ordination of specific policy issues. Appointed by the mayor, they can work on crosscutting issues such as the development and implementation of the local development strategy and deal with policy challenges such as multi-annual budget planning, unemployment or housing. In addition, 67% of the municipalities within FUAs reported the use of ad hoc meetings of senior officials on specific policy issues and permanent councils or committees with regular meetings for co-ordination. The work of permanent councils and committees can be sector-based in areas such as housing, infrastructure, energy and public safety or they can focus on particular crosscutting policy issues such as youth or elderly. The success of all institutions involved in co-ordination depends on political backing as well as on the provision of adequate (autonomous) financial resources, personnel, expertise, and technical support.

In addition to institutional mechanisms, municipalities have a number of partnership practices at their disposal that can help improve co-ordination. Across all three types, municipalities within FUAs are the most frequent users of these practices that were surveyed by the OECD questionnaire. The most commonly used partnership practices by municipalities within FUAs are the joint planning of activities and interventions (94%) and regular face-to-face meetings (88%). Large disparities between municipalities within FUAs and the other types are observable for the joint training of staff (82% of municipalities within FUAs / 62% of all LSGUs), joint information sharing systems (71% of municipalities within FUAs / 60% of all LSGUs), the joint data collection to monitor progress and outcomes of policies and services (76% of municipalities within FUAs / 44% of all LSGUs) and the use of shared policies (47% of municipalities within FUAs / 32% of all LSGUs).

4. Strategic planning for local development

Irrespective of their location or administrative capacity, almost all municipalities in Poland engage in a process of strategic planning to develop a Local Development Strategy (LDS). The 2003 Spatial Planning and Development Act and the Municipal Self-Government Act set the overall framework and objectives for planning at local level regardless of the size and location of the municipality. In 2020, the Polish Parliament passed amendments to the Act on Principles of Implementation of Development Policy that aims to improve the design and implementation of the LDS and strengthen the co-ordination across and among levels of government for local development. While the legal framework does not make it compulsory for municipalities to develop a LDS, it is regarded as a key document that sets the sociological, economic and spatial planning vision for local development and facilitates access to funding. For many municipalities, EU funds are the only way to finance the implementation of projects necessary to foster economic

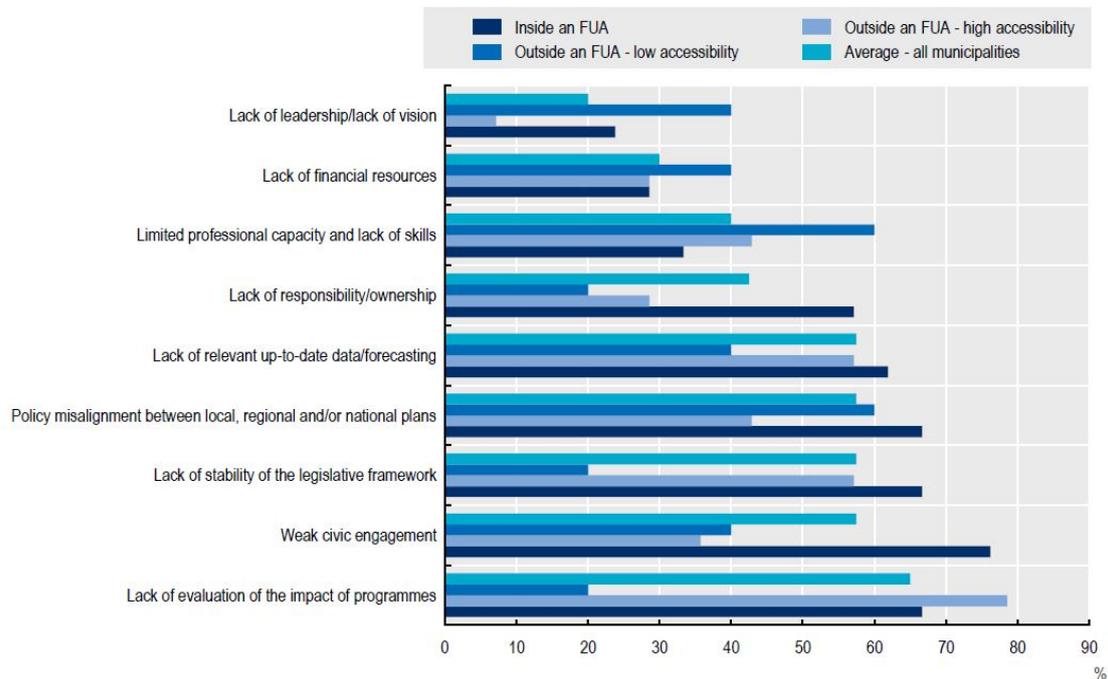
development. However, a minimum level of quality in the preparation of the LDS is needed to guide the decision-making process for the allocation of resources for investment.

Municipalities within a FUA are characterised by their spatial connections and interdependencies, as economic development processes happen within a wider geographical area than that of the municipality, and in some cases at a larger than provincial scale. Until recently, Polish municipalities within FUAs had little to no incentives to focus on functional metropolitan planning, with the exception of projects funded with EU resources. However, the latest introduction of the supra-local development strategy in the Act on Principles of Implementation of Development Policy opens the possibility of planning based on a functional area and not on the administrative borders. Moreover, Poland had also developed some instruments to encourage metropolitan planning such as the Metropolitan Association Act in the Silesian Voivodeship adopted in 2017, or the Integrated Territorial Investment (ITI), funded with the EU structural funds, which are implemented by 16 regional capitals and one additional city (Krukowska and Lackowska, 2016^[3]). There are also some promising experiences such as urban regeneration projects in the FUAs of Łódź and Gdańsk (OECD, 2016^[4]). Strategic planning has the potential to allow the different interests of the municipalities within FUAs to converge in shared visions and actions for the future.

The crucial significance of strategic planning for municipalities located within a FUA is that it may broaden the horizon and bring more action perspectives for operational decision-making. In Poland, it is not commonplace to consider the potential of strategic metropolitan planning – a common LDS for all municipalities within FUAs. Municipalities still tend to plan their LDS individually and only in some cases consult with neighbouring municipalities on relevant issues or actions that could affect them. This practice, although it may lead to certain levels of co-operation, does not necessarily lead to a shared development vision and investment decisions. Therefore, the challenge for municipalities within FUAs is to organise effective strategies of interconnectivity (Salet, 2007^[5]). Municipalities within a FUA tend to have greater financial and human resources and better access to data for strategic planning than in the other two types. The process of conducting strategic planning for development can thus be more comprehensive.

The elaboration of the LDS presents a number of challenges for municipalities located within FUAs. The most important one is weak civic engagement (76%), followed by the lack of impact evaluation of other programmes, the lack of stability of the legislative framework, and the policy misalignment between local, regional and/or national strategies (Figure 3). How municipalities engage with citizens differs across the country, but the fact that this is presented as the main obstacle for strategic planning suggests that, even for large municipalities with stronger administrative capacity, the problem is not a lack of willingness to engage with citizens but that the mechanisms used may not be the most adequate. The lack of impact evaluation of development strategies is also critical and it suggests that municipalities are not collecting data/evidence for updating their LDS. Another challenge is policy misalignment across levels of government, which suggests a weak dialogue across levels of government regarding the co-ordination of development priorities.

Figure 3. Main challenges designing a LDS by type of municipality

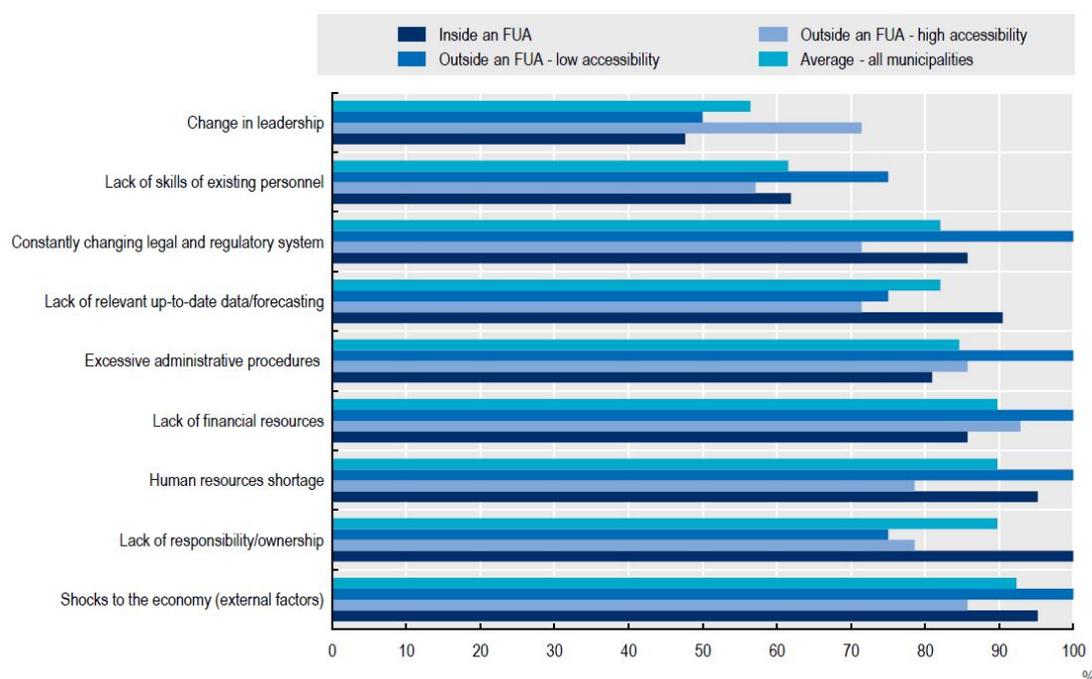


Note: Based on 40 responses from municipalities to the OECD questionnaire (n=40). It includes results from both answers “A major challenge” and “Somewhat of a challenge” to the question: “In general, what are the main challenges with respect to setting/elaborating local development strategies/local development 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)

For all municipalities within a FUA that responded to the OECD questionnaire, the lack of ownership for the LDS (100%) is a key problem in the implementation of the LDS (Figure 4). This does not mean that officials are not responsible for the implementation of the LDS, but that across the municipality citizens do not own the LDS and there is in consequence no sense of responsibility for its implementation. This result could be correlated to the weak civic engagement in the design phase of the strategy. If citizens did not have an active role in its design they would not feel identified with the development vision and objectives. This could complicate any attempt of metropolitan planning which requires ownership on the part of all municipalities within the respective FUA. Moreover, for 62% of municipalities within a FUA, qualified personnel is a challenge for the implementation. Shocks to the economy (95%) also lead to implementation problems in municipalities inside FUAs, as they could result in fewer financial resources (86%) or sources of funding for the operationalisation of their investment strategies.

Figure 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)

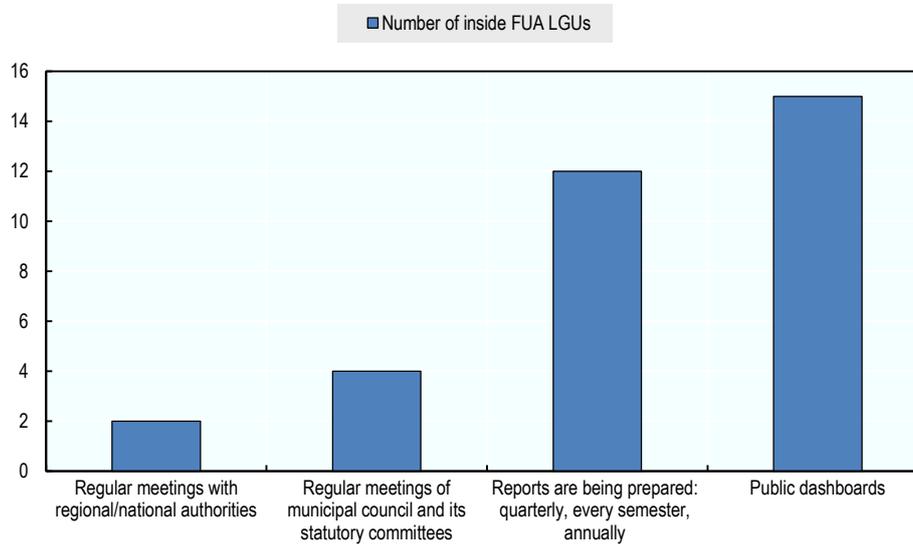
5. The use of evidence in strategic decision-making

The monitoring system at the municipal level in Poland is mainly framed by requirements related to the use of EU funds and to the national planning policy framework. In particular, municipalities may prepare local development strategies (LDS) by taking into account the orientations set out in the “Strategy for Responsible Development for the period up to 2020 with a perspective up to 2030” and adapt them to their local needs (Government, 2017^[8]). The November 2020 amendment to the Act on Principles of Implementation of Development Policy also seeks to encourage municipalities to develop local development strategies, in an effort to make these planning instruments mandatory eventually.

Data from the OECD questionnaire shows that just over 17 municipalities located inside FUAs monitor the implementation of the LDS. Municipalities that receive EU funds are also mandated to monitor and evaluate the use and impact of these funds (European Parliament and Council, 2013^[9]). However, quality and use of monitoring evidence remains a challenge in municipalities inside FUAs. More than half of these municipalities see having an adequate legal framework as one of the main challenges to the monitoring of policies at the local level. Moreover, the methodologies and tools used by municipalities for monitoring may not always be adapted to operational decision-making and communication. For instance, only 4 out of the 19 municipalities within FUAs surveyed hold regular meetings of their municipal council and its statutory committees (see Figure 5). While a large majority of such urban municipalities use the information collected through indicators to improve local strategies and sectoral plans and support coordinated policy design in different municipal offices, only 5 of them (out of 19) have an established potential course of action to remedy ineffective policies and service delivery performance. A large majority of surveyed urban municipalities also reported that the availability of data is a challenge for conducting and promoting

monitoring. Lastly, these municipalities generally lack sufficient financial and human resources to collect data on a regular basis, calculate indicators and analyse data.

Figure 5. Monitoring mechanisms and tools used by municipalities inside FUA



Note: n=19 (19 municipalities out of the 36 surveyed who answered are in functional urban areas. 39 were contacted and 3 did not answer this question. Answers reflect affirmative responses to the question: "Which monitoring mechanisms and tools are used? (Please tick all option that apply)". Multiple choice between the following responses: "Regular meetings of municipal council and its statutory committees"; "regular meetings with regional/national authorities"; "reports are being prepared quarterly, every semester, annually"; "Public dashboards"; "Public dashboards"; "Other, please specify". 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 local self-governments units. Source: Authors' own elaboration based on municipality responses to the OECD questionnaire (2020)

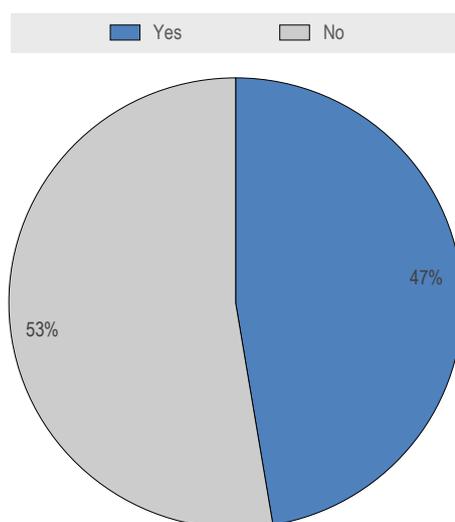
Despite Poland's noteworthy progress with regard to evaluation over the past 15 to 20 years, there remain a number of challenges for the development of monitoring and evaluation at the local level. These are notably linked to limited awareness and understanding of the benefits of evaluation, inadequate resources and capacity, insufficient use of evaluation results in policy-making, and quality of evaluations. Most municipalities within FUAs conduct some sort of *ex ante* and/or *ex post* assessment of the impacts of their public policy decisions, but these assessments are limited to certain policy areas or interventions. 16 and 14 of the 19 municipalities within this type declared in the OECD questionnaire that they conduct *ex ante* and *ex post* assessments respectively (mostly for some policies/regulations only). Evaluation-oriented efforts seem to be geared primarily to programmes and projects, especially those benefiting from EU Cohesion Policy funding, which has traditionally played an important role in driving evaluation activities. According to responses to the OECD questionnaire, size and resource endowments appear to shape municipalities' evaluation-related practices considerably. Large municipalities within FUAs tend to dedicate more time and resources to that end, with some of them encompassing dedicated units specialising in the assessment of the quality of policies. In contrast, evaluation in a number of their smaller, often rural, counterparts is often limited and unsystematic.

The use of evaluation results to inform public policy decisions is not systematic among municipalities located within FUAs and would need to be further promoted by means of explicit requirements, transparency and accountability provisions, and tailored incentives. Certain larger municipalities within FUAs appear to be quite advanced in that respect, with evaluations performed on a systematic basis, clearly embedded in the policy cycle and followed by corrective or improvement measures as appropriate. This situation contrasts with that in a number of smaller municipalities, where evaluation is either not carried

out at all or tenuously linked to decision-making. Key determining variables in this regard include available capacity as well as internal organisation and personal interest and involvement from leading political figures or high-ranking officials.

The use of monitoring and evaluation results is perceived as a challenge for almost all municipalities within FUAs surveyed in the OECD questionnaire. The drive for publicity of evaluation results has come from the national level as well as EU integration, with regulations mandating all evaluations to be published. However, less than half of surveyed municipalities within FUAs publish evaluation results publicly to engage with stakeholders (Figure 6), often due to a lack of necessary tools to do so.

Figure 6. Polish Municipalities making evaluation results public to engage with stakeholders (% of municipalities within FUAs)



Note: n=19. Out of the 37 municipalities surveyed (39 were contacted but 2 did not answer the question), 19 are inside functional urban areas. Answers reflect affirmative responses to the question: "How does your local government make use of the findings of policy evaluations to improve services and policies? (Please tick all that apply)". Multiple choice between the following responses: "The results are made public to engage with stakeholders on the implications of the findings of policy evaluation", "There is a structured/institutionalised mechanism in place (e.g. management response mechanism to follow-up on evaluation findings)", "There is a link to the allocation of resources", "There is a link to staff incentives and remuneration", "Findings are discussed in the municipal council or in its committees", "There is no direct influence of evaluation results", "We don't evaluate policies and programmes", "Other, please specify". 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 local self-governments units.

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

Linkages are seldom made between evaluation findings on the one hand, and resource allocation (only 5 out of the 19 municipalities reported such linkages) and staff incentives and remuneration (only Rzeszów) on the other hand. Only 3 out of the 19 municipalities in this type declared to have a structured/institutionalised mechanism in place (e.g. management response mechanism) to make systematic use of evaluation findings for improving services and policies, and one of them reported no direct influence of evaluation results on policy-making. There seems to be a need for institutionalising clear frameworks and processes to foster evidence-based policies and regulations, and to ensure systematic linkages throughout the policy cycle (including budgeting) as well as adherence to good practices over the long term.

6. Budgeting in municipalities

Evidence from the OECD questionnaire and several fact-finding missions, shows that in the medium-term, the main challenges faced by municipalities within FUAs include, among others, decreasing revenues and increasing revenue uncertainty. On the expenditure side, responsibilities were recently devolved to the local level, in particular in the area of education, without enabling municipalities to receive more central government transfers or shared national tax revenues. With the binding objective of balanced budgets and sustainable debt levels at the local level, there is the risk of too little public investment in the medium-term and the need for expenditure prioritisation. Municipalities encounter these challenges to different degrees - depending on their size and administrative capacity, their economic situation and their geographic location, in particular, regarding their accessibility to functional urban areas (FUA). In light of the medium-term budgetary pressures, which have become even tighter with the COVID-19 pandemic, the medium-term expenditure framework and performance budgeting are of particular interest from a budgetary perspective. Furthermore, the below assessment highlights participatory budgeting to increase stakeholder empowerment and support the priority-setting function of the budget.

While the OECD distinguishes between three types of Polish municipalities for its assessment, this section on budgeting focuses on all municipalities within FUAs. The reason for this is that the underlying budget law applies equally to municipalities in all three types and the focus lies on institutional aspects of budgeting. However, one dimension of heterogeneity that matters for budgeting is the size and the corresponding administrative capacity of individual municipalities. This dimension matters for implementing budgetary mechanisms and thus impacts the assessment of and the recommendations for budgeting. Therefore, the assessment is presented for large and small municipalities.

6.1 Budgeting in large municipalities

Large municipalities in Poland face competitive pressures on the tax side and only enjoy limited autonomy. Against this background, they undertake too little political efforts towards increasing revenue shares and revenue certainty in relation to central government transfers and shared national taxes. On the expenditure side, where municipalities have more discretion, public spending efficiency is not systematically scrutinised. A helpful tool to assess the effectiveness and efficiency of public spending for large municipalities could constitute the use of tailor-made spending reviews, which have been recently set up at the national government level. In this context, large municipalities make also too little use of systematic performance benchmarking to improve the comparability of their public services.

Moreover, among large municipalities, there is little effort to strengthen the co-ordination with the national government in general and the Ministry of Finance in particular to jointly address medium-term budgetary policy issues across levels of government. A regular dialogue addressing public finance topics across levels of government could take place, for instance, within the Joint Commission – reinforced in terms of its capacity and advisory functions. The Joint Commission brings relevant national ministries together with associations representing the regional and local authorities (including the Association of Voivodeships, the Association of Polish Cities (APC) and the Association of Rural Municipalities).

Given the time pressures under which budgetary decision-making takes place, the design of the annual budget cycle is reasonable for large municipalities and corresponds to OECD practices. In particular, large municipalities have a budget calendar that is well specified and understood by the different stakeholders involved in the budget process. The budget approval procedure is clearly codified in the Public Finance Act and ensures time for the municipal council to perform an essential role in the oversight by scrutinising the draft budget resolution and, where it considers appropriate, introduce amendments. The procedure also provides time for the Regional Audit Chamber (RAC) to fulfil its supporting mandate. The supervision and the audit of the public financial management is conducted in a strict and transparent manner by the RACs. While the RACs' involvement in the budgetary process seems rather strong, the merit of RACs as

long-standing supervisory institutions with multiple tasks and broad coverage is widely accepted and appreciated by key stakeholders. As a counterbalance to the strong RAC role, appeals by the municipalities against RAC resolutions can be filed in the administrative courts. This option is appreciated by municipalities to avoid excessive intervention of RACs.

With the Multiannual Financial Forecast (MFF), large municipalities have a basic framework for medium-term budgeting in place. The MFF covers the budget year and at least three additional years. Moreover, the debt forecast, which is part of the MFF, is drawn up for the period for which liabilities have been incurred or are planned to be incurred. Consistent with OECD practices, the MFF that large municipalities apply covers plausible planning horizons and is underpinned by economic assumptions. Further strengthening the use of the medium-term budgeting perspective in decision-making would support a better link between budgets and strategic priorities in a comprehensive way and beyond the annual cycle. Apart from the beneficial effect of a MFF on budgetary discipline, a stronger medium-term dimension helps stakeholders in identifying the policy choices and trade-offs beyond the annual budgetary cycle.

Performance budgeting facilitates annual and multiannual budgeting and helps to establish a clear linking of budgets with results and impacts in large municipalities. Large municipalities often complement the traditional and legally binding budget with a parallel performance budget. Further steps for large municipalities could include developing their performance budgeting frameworks gradually in terms of budgetary coverage and in terms of evaluation and monitoring of performance information. In this context, efforts to support the development of quality performance information, performance indicators and performance benchmarking for informing and guiding future decision-making are considered important to underpin the value of performance budgeting systems.

In cities with powiat status, participative budgeting has been recently strengthened. In particular, in 2018, Poland redefined and formalised participatory budget institutions in order to ensure a wider use and increase the participation of citizens. While participative budgeting is a major local governance innovation, no further formalised opportunities for citizen involvement to ensure a participative approach to budgeting are in place. Options include more timely and formalised consultative processes during the budget cycle, taking into account the knowledge and capacities of stakeholders and enhancing municipal council engagement with citizens.

6.2 Budgeting in small municipalities

Small municipalities in Poland face competitive pressures on the tax side and only enjoy limited autonomy. At the same time, small municipalities undertake little political efforts towards increasing revenue shares and revenue certainty in relation to national government transfers and shared national taxes. On the expenditure side, where municipalities have more discretion, public spending efficiency is not systematically scrutinised. A helpful tool in this context for small municipalities is a systematic performance benchmarking to pool relevant information and improve the comparability of their public services.

Among small municipalities, there is little effort to strengthen the co-ordination with the national government in general and the Ministry of Finance in particular to address the medium-term budgetary policy issues across levels of government. A regular dialogue addressing public finance topics across levels of government could take place, for instance, within the Joint Commission – reinforced in terms of its capacity and advisory functions.

The design of the annual budget cycle seems reasonable for small municipalities and corresponds to OECD practices. In particular, small municipalities have a budget calendar that is well specified and understood by the different stakeholders involved in the budget process. The budget approval procedure is clearly codified in the Public Finance Act and ensures time for the municipal council to perform an essential role in the oversight by scrutinising the draft budget resolution and, where it considers appropriate, introduce amendments. The procedure also provides time for the Regional Audit Chamber

(RAC) to fulfil its supporting mandate. The supervision and the audit of the financial management of municipalities is conducted in a strict and transparent manner by the RACs. While the RACs' involvement in the budgetary process seems rather strong, the merit of RACs as long-standing supervisory institutions with multiple tasks and broad coverage is widely accepted and appreciated by key stakeholders. As a counterbalance to the strong RAC role, appeals by the municipality against RAC resolutions can be filed in the administrative courts. This option is appreciated by municipalities to avoid excessive intervention of RACs.

With the MFF, small municipalities have a basic framework for medium-term budgeting in place. Consistent with OECD practices, the MFF covers plausible planning horizons and is based on economic assumptions. The MFF is well anchored in the Public Finance Act and is used within the annual budget cycle. However, the use of the MFF as tool for priority setting within the budgeting process and its relation to the local development plan is often underdeveloped. Small municipalities often set priorities within the annual budget cycle and focus on small-scale projects, paying little attention to the MFF. Strengthening the medium-term budgeting perspective and increasing its use in budgetary decision-making would constitute a step forward to support a link between budgets and strategic priorities beyond the annual cycle. Apart from the beneficial effect of a MFF on budgetary discipline, a stronger medium-term dimension helps stakeholders in identifying the policy choices and trade-offs beyond the annual budgetary cycle.

Performance budgeting helps to increase transparency and accountability, align identified priorities with the budget and beyond the annual cycle. This budgetary mechanism is rarely used in small municipalities. If small municipalities wish to consider introducing performance budgeting, an incremental approach over time seems appropriate. Moreover, small municipalities should be aware of the corresponding challenges, e.g. concerning the availability of quality data on performance and the use of performance information. Small municipalities could first consider selecting the areas most suited for performance budgeting and develop corresponding indicators and targets. In this context, building capacity for introducing performance budgeting frameworks in terms of human resources, data and related infrastructure and learning from peer-group experiences is important for small municipalities. Efforts to support the development of quality performance information, performance indicators and performance benchmarking are crucial within this process.

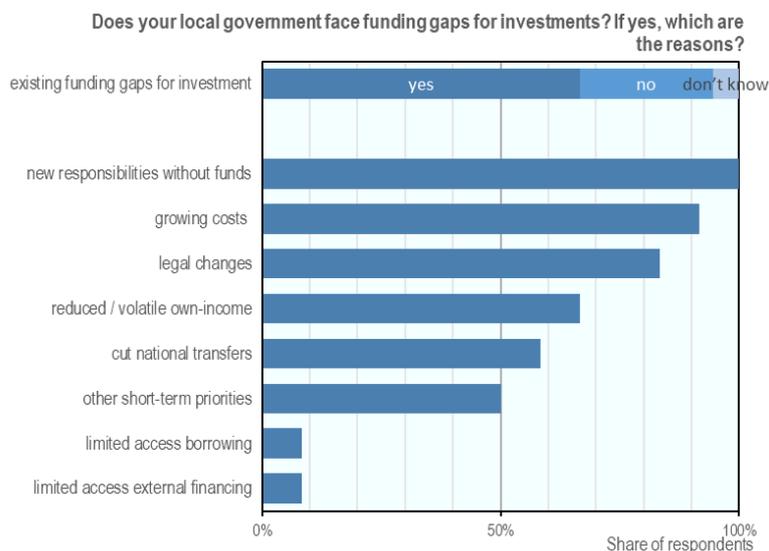
Participatory budgeting is an effective mechanism to enhance community empowerment and strengthen the connections between government and citizens. Participatory budgeting is particularly promising at the local level where political decision-makers and citizens closely interact and are close to the issues at stake. While participatory budgeting has been recently legally anchored, including defining its requirements for LSGUs with powiat status, it is still voluntary for small municipalities. To increase the incentives for active citizen involvement and for a better formalisation of the process, an extension of these provisions to small municipalities could be promoted. Apart from participatory budgeting initiatives, no further formalised opportunities for citizen involvement to ensure a participative approach to budgeting are in place.

7. Strengthening multi-level governance and investment capacity to enhance local development

While all municipalities across Poland face public investment gaps, this gap is particularly acute for infrastructure investments in urban municipalities. Municipalities inside FUAs, declare having a significant investment gap in urban transport - 43% of urban municipalities report an investment gap (compared to 35% at the EU level) - and environment (European Investment Bank, 2017^[9]). Indeed, as per the OECD questionnaire, a majority of municipalities inside FUAs (67%) declare facing funding gaps for investment (Figure 7). Funding gaps seem more frequent for municipalities inside and outside FUAs, with high accessibility (67% and 86% respectively) compared to remote municipalities (40%). The main reason behind these funding gaps for all municipalities inside FUAs has been the transfer of responsibilities without

the adequate funding, in particular in education (see above). A majority of them also explain this gap by growing costs (83%) and constant legal changes (75%).

Figure 7. Funding gaps for investment in Polish municipalities inside FUAs



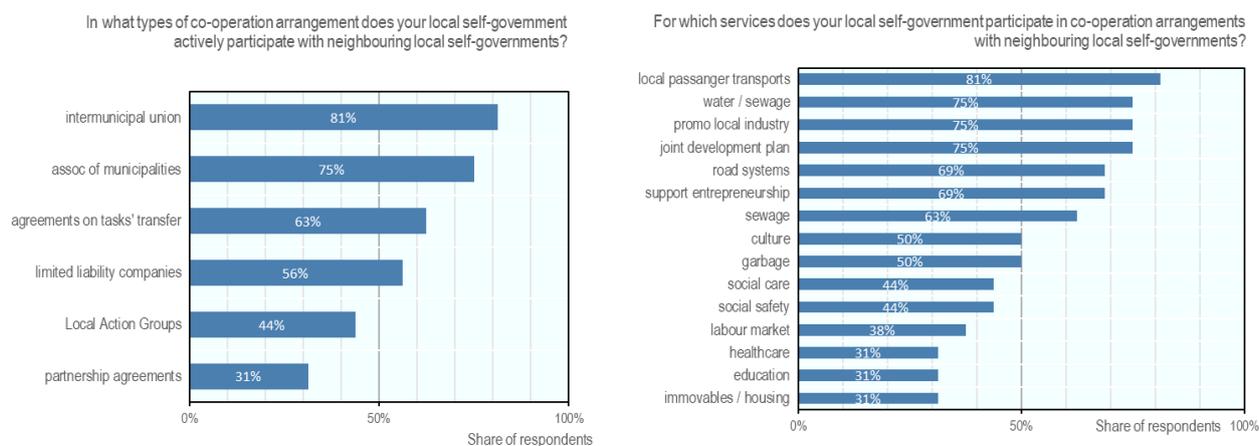
Note: n=12 municipalities

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

Co-ordination and collaboration among municipalities is particularly relevant for municipalities inside FUAs as it helps promoting productivity and facing growing urbanisation and the associated challenges that come with it (housing affordability, travel times, traffic, pollution, etc.). Enhancing the co-operation and co-ordination of the provision of public infrastructure and services on a metropolitan scale can also improve the quality of life and international competitiveness of large cities. The current law for metropolitan governance is dedicated to the Silesian Voivodeship. The law gives the voivodeship the opportunity to establish the metropolitan association on its territory. As such, the GZM Metropolis was created in 2017, as a pilot experience (Górnośląsko-Zagłębiowska Metropolia (GZM Metropolis)). Urban municipalities could take further advantage of this experience to move in this direction and facilitate a whole-of-city approach to investments and policy delivery.

Still, some municipalities inside FUAs have taken advantage of other forms of inter-municipal co-operation foreseen by the Polish law. As reflected in the OECD questionnaire, municipalities inside FUAs are the ones that make the greater use of inter-municipal unions - 81% of them declare being part of this type of collaboration scheme; 75% of municipalities inside FUAs are part of an association of municipalities and 63% have signed an agreement on the transfer of tasks (see Figure 8). The majority of these co-operation schemes are established for local transport purposes (81%), water (75%), the promotion of local industry (75%), and the elaboration of joint plans (75%). Yet, collaboration for other areas such as healthcare or education – two major responsibilities of local self-governments - is still weak. The low uptake of other forms of collaboration might be explained by the lack of financial resources to enter into a co-operation arrangement, identified by all municipalities inside FUAs as the most important challenge for inter-municipal co-operation. Other key challenges for this collaboration to happen are associated to excessive administrative procedures as well as the lack of incentives to form co-operation arrangements.

Figure 8. Co-operation arrangements between municipalities inside FUAs



Note: n=16

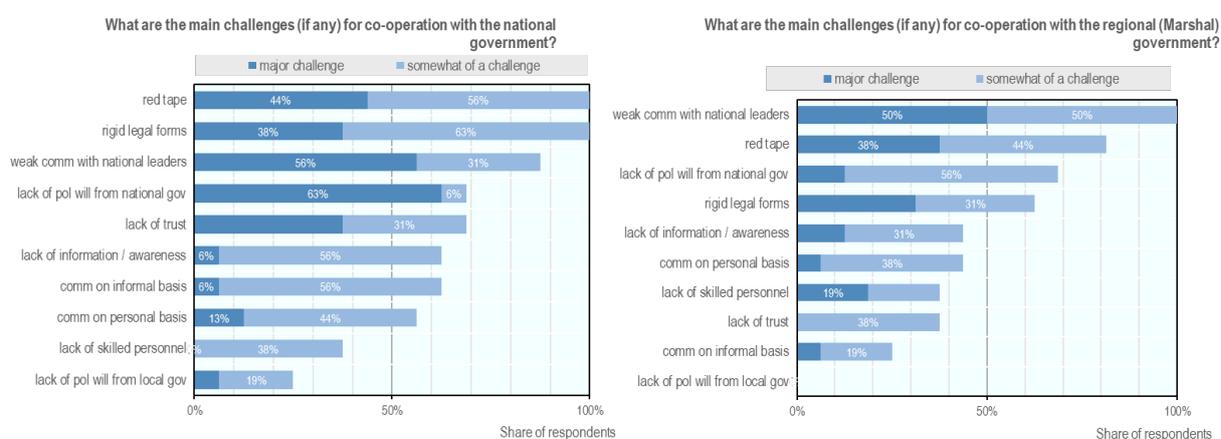
Source: Author's own elaboration based on municipality answers to the OECD questionnaire (2020)

Moving towards a functional approach to strategic planning, that considers the whole territory and not only the administrative boundaries is a crucial step forward in planning and co-operation of functional urban areas. Encouraging the use of specific instruments that allow such joint strategies would allow municipalities to have a comprehensive and territorial approach to development. More flexible co-operative arrangements that can be adapted to the different realities of FUAs is crucial. Indeed, the existence of rigid legal forms of co-operation in Poland is among the top five challenges highlighted by all type of municipalities in the OECD questionnaire, being more prominent for municipalities inside functional areas (Figure 8).

In parallel, a vast majority of municipalities inside FUAs participate in one or several co-ordination arrangements with the regional and national levels. In the OECD questionnaire, 94% of municipalities inside FUAs declared having participated in formal consultations as well as formal committees to co-ordinate policies. This large participation is in accordance with the efforts that the country has done to encourage vertical co-ordination, especially in the form of consultations. However, territorial contracts are less popular than other forms of co-ordination among municipalities within FUAs (63% of respondents participate in territorial contracts). Moreover, the projects managed and co-financed through territorial contracts tend to be fragmented and sector driven and its use has been mainly restricted to large infrastructure initiatives in urban areas.

Similarly to the other types of municipalities, municipalities inside FUAs need to deal with complex and rigid administrative procedures when they co-operate with higher level of governments. Indeed, during the OECD field research, different municipalities declared that bottlenecks for vertical co-ordination often arise from lack of understanding of the processes. The vast majority of municipalities inside FUAs declared that red tape and the rigidity of legal forms are two of the major challenges when it comes to collaboration with both, the national and regional levels (Figure 9).

Figure 9. Co-ordination challenges with the national and regional levels identified by Polish municipalities inside FUAs



Note: n=16

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

8. Toward a more strategic and effective local self-government workforce

Legislation regarding Human Resource Management in Polish municipalities is set at national level. It applies to all municipalities, regardless of size or proximity to Functional Urban Areas (FUAs). Nevertheless, the ability of municipalities to work within this framework is partly influenced by factors such as their proximity to FUAs. Municipalities inside FUAs generally carry out a more extensive and crosscutting range of tasks than smaller municipalities or municipalities that are far from urban centres. This affects the type of skills, leadership and organisational supports (such as learning and development) that are required.

With greater organisational complexity and a larger staff, municipalities in FUAs have more scope to apply principles of strategic human resource management (SHRM). SHRM is an approach to ensuring that the right people with the right skills work in the right places to achieve goal and objectives as effectively and efficiently as possible (OECD, 2017^[10]). However, in the OECD questionnaire relatively few municipalities within FUAs (six) stated that they 'systematically' applied strategic human resource planning. Most other municipalities within FUAs either noted plans to improve capability in this area (seven municipalities) or stated that they 'somewhat' applied SHRM principles (three municipalities). Regardless of the small sample size that responded to this question, the trend indicates that there is scope for municipalities within FUAs to improve their understanding of key SHRM principles and work toward their implementation.

In this regard, examining the human resource priorities of municipalities within FUA may help contextualise the general lack of systematic application of SHRM principles and point to areas for future focus. In total, 40% of all types of municipalities surveyed indicated that employer attractiveness – i.e. the ability of the municipality to appeal to and attract qualified candidates – was the most important priority for staff working in human resources in the municipalities. However, only half of the municipalities located within FUAs agreed that this was a high priority. The next most important priority for all types of municipalities surveyed was pay reform: 37% indicated that this was a high priority. Yet again, when looking at the municipalities located within FUAs, just half indicated that pay reform was a high priority.

This suggests a lack of heterogeneity of key human resource priorities in municipalities located inside FUAs: attractiveness and pay reform are not necessarily perceived as key priorities for a substantial portion

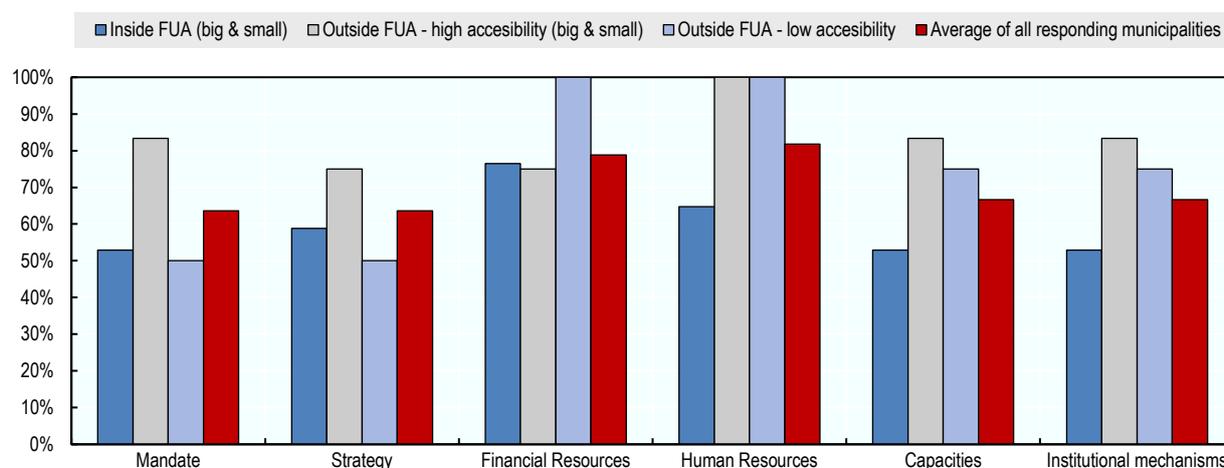
of this group. This may be related to the greater pool of potential candidates for positions in FUAs than in remote municipalities. But while proximity to urban centres may increase the potential supply of qualified candidates, it may also result in increased competition for talent with other employers. Learning and development strategies aligned with competency frameworks can give organisations – and municipalities – a valuable tool in developing talent and achieving operational objectives. However, most municipalities inside FUAs do not see the need for training reform (no municipality indicated that it was a high priority) and for work-life balance. With few employers immune from the battle for talent, municipalities in FUAs may wish to examine how they can best align workforce development projects more systematically.

9. Open Government

Evidence shows that large and small municipalities located inside FUAs often have more access to a variety of human and financial resources and thus increased capacity to implement open government initiatives and to improve existing ones. According to the findings of the OECD questionnaire, municipalities inside FUAs conduct a higher number of open government initiatives compared to the two other types. While they have approximately 10 initiatives on average, those outside FUAs with high accessibility reach 8 on average and those with low accessibility 7 on average. The questionnaire revealed that those most commonly implemented in this type of municipality are participatory budgeting (87% of respondents), youth engagement (81%) and transparency in public procurement as well as guidelines on citizen participation (75% for both). Moreover, municipalities inside FUAs, similar to those outside with high accessibility, have more developed Open Government Data policies and foster related initiatives in this regard to further engage with stakeholders.

This type of municipality has the opportunity to take a more strategic approach to open government by consolidating the scattered and fragmented initiatives they currently implement in a standalone document in the form of a programme, strategy or policy. In fact, 53% of municipalities inside FUAs found that a lack of or inadequate strategy is a significant challenge for the implementation of open government initiatives (Figure 10). More generally, the OECD questionnaire found that only 24% of municipalities of all types have a specific institution, office, or body in charge of open government initiatives. In fact, larger municipalities within FUAs as well as those outside of FUAs with high accessibility have greater resources, resulting in them being more likely to have an office for interacting with civil society organisations (CSOs) and citizens. Furthermore, the co-ordinating office or official in charge requires a strong mandate to convene the resources and range of stakeholders needed to attain its outlined objectives. In this regard, 53% of municipalities in this type consider the lack of or insufficient mandate for the implementing institution a main challenge, as shown in the OECD questionnaire.

Figure 10. Main challenges in implementing open government initiatives for Polish municipalities



Note: N = 33 responses, from which 17 are inside FUAs (large & small). Responses include municipalities replying major and somewhat a challenge. Answers to this question included other challenges. 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 local self-governments units.

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

In order to establish an open government culture, municipalities inside FUAs need to provide adequate capacities for the implementation of open government initiatives and improve public communication to effectively engage with stakeholders. In that context, the OECD questionnaire has shown that 53% of municipalities of this type found the lack of capacities (human and financial) in the implementing institution as a main challenge. This is even more relevant when considering the type of resource: 65% of municipalities inside FUAs found human resources as an important challenge, and 76% for financial resources. In addition, most local self-governments of all types, including those inside FUAs, also identified a lack of awareness or motivation among stakeholders to participate as a key challenge. These challenges are reflected in the data from the questionnaire, where municipalities inside FUAs most often involve stakeholders that are identified as being affected by the policy issue in identifying policy priorities (69%), followed by policy implementation and evaluating the results and monitoring the impact of policies (56%). They also tend to involve CSOs in identifying policy priorities (75%) as well as in policy implementation (63%). As for the other types of municipalities, these findings indicate the need to better communicate with a wider variety of stakeholders beyond 'the usual suspects' in all stages of the policy cycle, including vulnerable, underrepresented, and marginalised groups.

10. Reducing administrative burden and simplifying public procurement

In the context of administrative simplification and public procurement, the level of resources (financial, technical staffing) available to a given municipality is a key determinant for the actions to implement. Based on the information collected during fact-finding missions by the OECD, it is assumed that resource availability correlates with the size of a local authority. More specifically, the following assumptions apply to characterise municipalities in the context of this section:

1. Inside FUA: large municipalities, well-resourced in terms of staff, knowledge, reasonable access to broadband and adoption of digital technologies;

2. Outside FUA with high accessibility: small or medium-sized municipality; limited capacity (e.g. 2-5 full-time employees for public procurement) limited broadband access and uptake of digital tools;
3. Outside FUA with low accessibility: small municipality, limited resources and capacity (e.g. 1 or less full-time employee for public procurement), highly constrained access to broadband and uptake of digital tools.

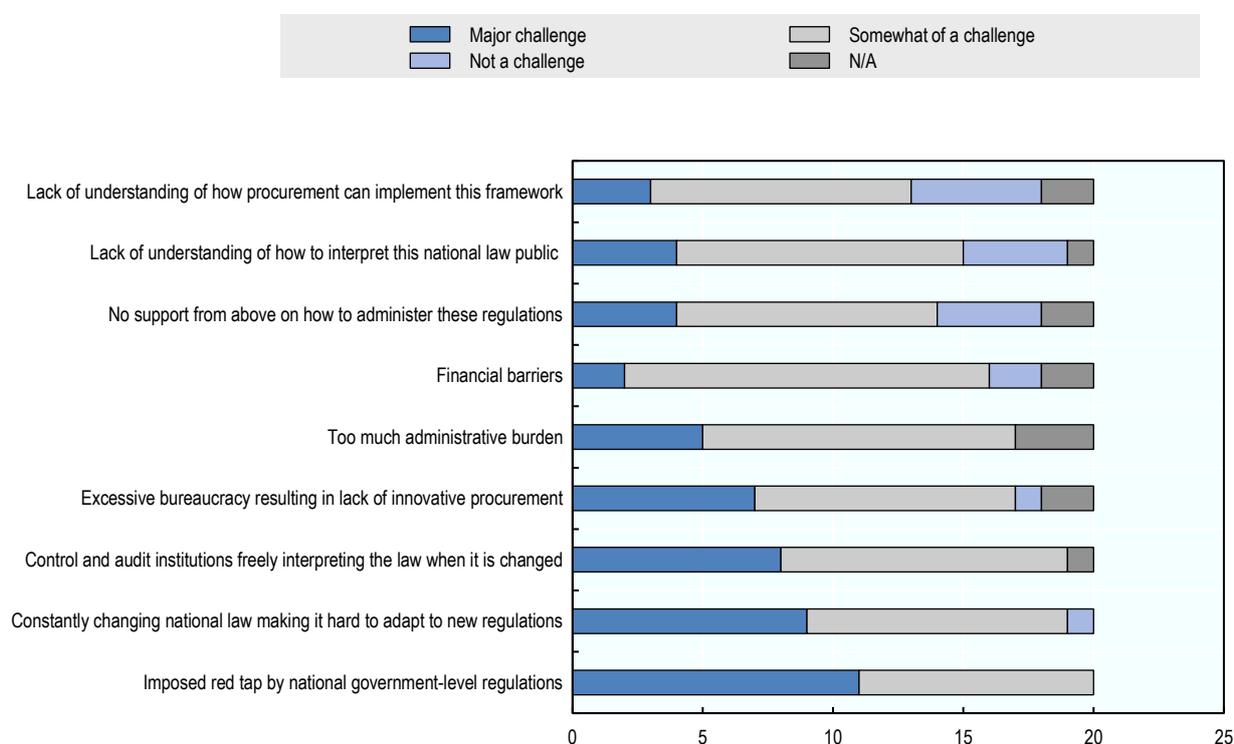
Many of the reforms designed and emitted by the central government assume that municipalities have a role of 'reform-takers', giving local governments little room for manoeuvre. Thus, the scope for simplification is often limited, particularly in the procurement context, which is shaped at EU and national level. Constant regulatory changes, not only regarding public procurement, but of general norms, limit the capacity of municipalities to keep track of them and hinders their ability to provide information in friendly formats and readily available to its citizens. In fact, only 45% of municipalities inside FUAs offer relevant information to their residents and businesses in formats easy to access.

Although some municipalities inside FUAs (55% of those consulted) carry out some form of administrative burden reduction, only 25% of them have an explicit requirement to do it. In addition, co-operation with other municipalities on issues of administrative simplification is relatively low, with 45% of the municipalities inside FUAs engaging in agreements to cut red tape for citizens and businesses. The information collected by the OECD during fact-finding missions show that many of these simplification efforts rely on the initiatives of the mayor or on the current municipal administration, which presents a risk to the continuity of any simplification strategy, as new administrations may have different priorities.

Municipalities located inside FUAs usually have more resources than those outside FUAs in terms of staff and digital tools, and as such are overall in a better position to effectively adopt upcoming regulatory changes and simplify administrative processes, particularly in the public procurement context. Information gathered during the fact-finding missions show that municipalities inside FUAs are also more likely to be advanced in the process of digitalisation and e-procurement, and to ensure their trainings needs are met. They are also more likely to have established some degree of formalisation of their below threshold public procurement, which ensures standardisation, openness and transparency of small value procurement.

However, they face significant challenges in terms of applying the Public Procurement Law. Figure 11 shows the results of the questionnaire for municipalities inside FUAs and two elements stand out as main difficulties: red tape and frequent regulatory changes. Given the conditions of these municipalities, they can be proactive actors to strengthen cooperation with the national government and other municipalities, especially when it comes to shaping reform initiative, reducing administrative burden, implementing digitalisation and simplification of procurement practices, and they can share some of their knowledge and expertise with less advanced municipalities.

Figure 11. Challenges faced by municipalities inside FUAs when administering the public procurement law



Note: n=20, answers refer to municipalities inside FUAs

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

11. Recommendations

1. Co-ordination across administrative units and policy sectors within municipalities

One of the main challenges that municipalities are facing with regard to effective co-ordination across administrative units and policy sectors is the lack of resources (financial, time, personnel, etc.). In addition, a relatively low level of awareness in Polish municipalities of the importance of intra-LSGU co-ordination, a lack of information and data as well as technical resources, weak reporting arrangements and information sharing are challenges faced by a majority of LSGUs. The following recommendations aim at addressing these key challenges to foster intra-LSGU co-ordination.

Ensure institutional responsibility for co-ordination

- Define and communicate LSGU units and departments' responsibilities by sharing with all LSGU staff and publishing a user-friendly organigram depicting the LSGU's organisational structure.
- Establish clear institutional responsibility for co-ordination. In particular, by amending the definition of tasks of mayors in the Act on Local Self-Government to include and define the mayor's responsibility for intra-LSGU co-ordination and clearly assigning the responsibility for general co-ordination functions to one or more units in the LSGU.
- Establish and communicate formal mandates for co-ordinating units/departments included in the LSGU's general organisational regulations or a separate regulation.

- Consider the use of formal reporting arrangements between the mayor or the institution in charge of co-ordination and other units/departments based on non-regulated informal tradition.
- Make more strategic use of policy documents to foster co-ordination. In particular, by including references to intra-LSGU co-ordination in reform plans and development strategies to help raise awareness of the importance of co-ordination; and developing specific policy documents that can assist policy-makers and LSGU employees with co-ordination.

Foster effective co-ordination in-house through institutional mechanisms and partnerships

- Create fit-for-purpose task forces composed of different units/departments (and external stakeholders where possible) for the work on crosscutting policy issues.
- Use existing permanent councils/committees to improve co-ordination, in order to co-ordinate LSGU work on particular policy issues.
- Promote joint planning of activities and shared policies between two or more independent administrative units for better planning and improved local development strategies. In particular, by encouraging units/departments to integrate their work around joint goals and strategic objectives.
- Ensure open and regular information and document sharing across administrative units, in particular through an online information and document management system.

Develop capacity and resources for co-ordination

- Focus on the development of in-house skills and competencies needed for effective co-ordination through training.
- Include co-ordination references in human resource management tools by incorporating references to co-ordination in LSGU staff recruitment documents, competency and values frameworks and introducing co-ordination in performance management.

2. Strategic planning for local development

Municipalities must now conduct strategic planning for local development based on the recent changes to the Act on Principles of Implementation of Development Policy. This reform takes planning with a FUA to the next level, which means planning at the functional level and not at the administrative. Municipalities within a FUA may wish to consider the following recommendations to prepare their supra-local development strategy:

- **Develop participatory approaches to strategic planning across the FUA** by promoting the participation of citizens, the main economic, social and institutional actors and the urban development policy-makers. This is important to create ownership of the supra-local development strategy by the different stakeholders in the FUA, which was one of the main challenges reported for the design of a local development strategy. Polish municipalities within a FUA could draw inspiration from “The Citizens Agreement” for an inclusive Barcelona, which is a space for the co-production and co-management of social inclusion policies and projects in the metropolitan area of Barcelona and is made up by more than 600 economic, social and cultural entities.
- **Create a metropolitan planning institute to co-ordinate the design and implementation of the supra-local development strategy.** The institute should be funded and managed by all municipalities within the FUA through a set of clear established rules. Planning across different municipalities could be a complex process; it requires highly professional skills and competences for strategic planning, transport, land-use management, and citizen engagement. Poland may look at the Prague Institute of Planning and Development, the Metropolitan Planning organisations in

the United States, France's intermunicipal authorities, for inspiration on how to organise a metropolitan planning authority as they are multi-purpose and have a varying degree of shared resources and responsibilities. The institute should be funded by all municipalities and have clear responsibilities.

- **Create a metropolitan forum or an observatory tasked with collecting metropolitan data.** In general, there is a significant gap in Polish municipalities as regards data on housing, land use, transport and environmental challenges and workforce needs. These data are needed to enable planners to prepare a diagnosis of existing challenges and opportunities and ensure that future plans are based on a sound baseline assessment. Municipalities also need to develop system for managing and updating data; to this end, a digitised database could be developed with the assistance of national and regional authorities and made accessible to all municipalities within the FUA. The regional monitoring initiative in the metropolitan region of Nuremberg, Germany, and the *Fundación Metropolitana* (Metropolitan Forum) in Buenos Aires, Argentina, could be of interests to Poland. This could help overcome the main weaknesses in planning of municipalities such as lack of human resources and data.
- **Ensure reliable sources of metropolitan funding for local development.** The national government needs to assess how the new governance structure for planning can respond to the financial needs for local development in the FUAs. There needs to be a match between financial resources and responsibilities. The national government may wish to bolster the revenue raising capacity of municipalities by reforming the property tax, updating fees structures and improving systems to facilitate tax collection. Municipalities within a FUA are normally richer than other municipalities sin Poland but also face major spending needs as they provide services to a larger number of people. In many cases, it may be that painfully achieved consensus on supra-local priority development needs are not translated into concrete fiscal modalities. Poland may look at Mexico's metropolitan funds as an example on how to fund metropolitan development projects in a context of weak municipal revenues.
- **Identify concrete metropolitan investment projects.** The supra-local development strategies provide a window of opportunity to overcome the main urban development challenges in the metropolitan area. But even within the FUA municipalities may have different challenges for what they would need their own LDS. It is thus advisable that at supra-local level development strategies focus on concrete projects that have a relevance for the entire FUA such as transport and land-use planning, or even waste management services. This would be a way of kick-starting collaborative initiatives across the FUA around tangible projects.

3. *The use of evidence in strategic decision-making*

Monitoring local development strategies

- Use monitoring guidelines developed by the Ministry of Regional Policy and Development Funds to clearly differentiate the monitoring set-up for each of the following objectives: operational decision-making, accountability and communication to citizens.
- Set up an internal performance dialogues in municipalities between the highest decision-making level and the heads of departments/services in order to improve operational decision-making.
- Improve communication to citizens by updating a few key indicators on a public website or by elaborating a communication document on the progress made on the strategy at regular intervals (for example every year).
- Clarify the indicators used to monitor each Local Development Strategy. Include indicators based on administrative data. Take advantage of the system for monitoring public services currently under development to build these indicators.

Develop evaluation practices at the municipal level

- Capitalise upon the evaluation ecosystem that has developed around EU Cohesion Policy interventions by broadening and enhancing the awareness and knowledge of the benefits that can be derived from performance measuring and evaluation more generally.
- Improve institutional co-ordination for meaningful design and implementation of evaluation, as delivery of a number of public services tends to involve, to some extent, different levels of government. In the same vein, explore venues to improve communication and institutional cooperation among municipalities, possibly with regional level authorities in a coordinating or facilitating role, with a view to optimising the use of available resources. This may notably involve the networking of knowledge and expertise; e.g. developing a network of evaluation experts accessible to municipalities.
- Address data availability and resource constraints, including analytical capacity, by identifying ways in which in-house capacity for evaluation can be enhanced; e.g. access to additional resources, relevant data sources, training opportunities, participation in communities of practice.

Use of evidence for strategic decision-making

- Add a dedicated page on www.ewaluacja.gov.pl for municipalities to upload the results of their evaluations.
- Include, in all evaluation terms of reference prepared by municipalities, the fact that the report must include an executive summary with recommendations.
- Take advantage of social media to share “information nuggets” on local development strategies.
- Further institutionalise the use of evaluation findings for decision making purposes:
 - Identify appropriate knowledge brokers vis-à-vis decision makers to help synthesise and convey available evidence.
 - Establish proportionate requirements for transparent and evidence-based decision-making; e.g. to provide a public and substantiated explanation in cases where evaluation findings are not taken into account.
 - Establish clear and explicit linkages between available evidence and resourcing. This applies to budgeting decisions on investment outlays and expenditure as well as to staff incentives and remuneration.
 - Promote the use of evaluation results in decision making by including such use among the criteria that are considered for civil servants’ performance assessments.
 - Engage in dissemination of good practices and exchange of experiences between relatively better equipped and more experienced municipalities (typically larger ones in FUAs) and their less advanced counterparts in this area.

4. Budgeting in municipalities

Recommendations for large municipalities

- In light of competitive pressures on the tax side and limited autonomy of municipalities, undertake efforts towards increasing revenue shares and revenue certainty in relation to national government transfers and shared national taxes.
- Strengthen the co-ordination with the national government in general and the Ministry of Finance in particular to jointly address the medium-term budgetary policy issues across levels of government within a reinforced Joint Committee of National Government and Territorial Self-government.

- Scrutinise public spending efficiency on a systematic basis by means of spending reviews and systematic performance benchmarking.
- Strengthen the medium-term budgeting perspective to support a better link between budgets and strategic priorities in a comprehensive way and beyond the annual cycle.
- Strengthen the use of performance budgeting frameworks by means of an incremental approach.
 - Larger municipalities already using performance budgeting should consider developing their framework gradually in terms of budgetary coverage and in terms of monitoring of performance information. They should ensure the inclusion of all administrative units in the process and the development of quality information to facilitate evidence-based reviews.
 - Efforts to support the development of quality performance information, performance indicators and performance benchmarking for informing future budgetary decision-making and, at the same time, underpinning the value of performance budgeting should be supported.
- Ensure a participative approach to budgeting by setting up more formalised opportunities for citizen involvement.
- Sustain efforts to further reinforce the use of participatory budgeting in municipalities.

Recommendations for small municipalities

- In light of competitive pressures on the tax side and limited autonomy of municipalities, undertake efforts towards increasing revenue shares and revenue certainty in relation to national government transfers and shared national taxes.

Strengthen the co-ordination with the national government in general and the Ministry of Finance in particular to jointly address the medium-term budgetary policy issues across levels of government within a reinforced Joint Committee of National Government and Territorial Self-government.

- Scrutinise public spending efficiency on a systematic basis by means of promoting a systematic performance benchmarking.
- Strengthen the medium-term budgeting perspective to support a better link between budgets and strategic priorities in a comprehensive way and beyond the annual cycle.
- Strengthen the use of performance budgeting frameworks by means of an incremental approach.
 - Smaller municipalities could consider steps towards performance budgeting over time taking an incremental approach for introducing performance frameworks and be aware of the challenges.
 - Smaller municipalities should first consider selecting the areas most suited for performance budgeting and develop corresponding indicators and targets.
 - Smaller municipalities are recommended to build capacity for introducing performance budgeting frameworks in terms of human resources, data and related infrastructure in the first place and learn from peer-group experiences.
 - Efforts to support the development of quality performance information, performance indicators and performance benchmarking for informing future budgetary decision-making and, at the same time, underpinning the value of performance budgeting should be supported.
- Ensure a participative approach to budgeting by setting up more formalised opportunities for citizen involvement.
- Sustain efforts to further reinforce the use of participatory budgeting in small municipalities, for instance, supported by an extension of the corresponding provisions.

5. Strengthening multi-level governance and investment capacity to enhance local development

Reduce the mismatch between expenditure and revenue-generating means

- **Large municipalities with sufficient capacity can adopt innovative sources and instruments** of financing. For example, they can collaborate with the private sector and institutional investors, adopt public-private partnerships or other instruments (e.g. green bonds, social impact bonds) for the large metropolitan areas.
- **The national government should increase the tax autonomy of municipalities** to reduce their dependency on state transfers. This can be done by granting larger tax autonomy to municipalities, i.e. more power over tax rates and bases, in particular concerning property tax.
- **The national government should ensure that devolved responsibilities are sufficiently funded.** For this, a review of the competencies and functions of municipalities and their corresponding funding could be undertaken to clarify the breakdown of responsibilities and how they are funded. This review could also take place over the medium term within the framework of a formal national dialogue.

Strengthening inter-municipal co-operation

- **Municipalities within FUAs should explore the opportunity of developing joint development strategies or supra-local development strategies.** They can identify a person/team to actively and regularly identify opportunities for co-operation with neighbouring municipalities, monitor the co-operation scheme and evaluate its results/outputs. They can also define indicators (financial and non-financial) to monitor and evaluate co-operation and partnership agreements.
- **The national government should a flexible legal framework to strengthen inter-municipal cooperation.** A thorough revision of the different existing legal frameworks related to inter-municipal cooperation would be needed, with the aim to simplify the administrative procedures to establish co-operative arrangements.
- **The national government can generate financial incentives for inter-municipal co-operation,** to encourage investments in sectors in which cooperation is low. These financial incentives should particularly target projects aligned with the supra-local development strategies.
- **The national and/or regional self-governments can develop of clear toolbox or guidelines** for municipalities specifying the benefits of different types of inter-municipal co-operation arrangements, as well as the concrete steps they could take to establish a partnership with neighbouring municipalities in the FUAs. This document needs to include clear guidelines on how to deal with the administrative procedures of the different instruments foreseen by law when establishing co-operative arrangements.
- **The national government, in co-operation with voivodeships, should promote peer-learning activities** to share good experiences on how to implement ITIs, Partnership City Initiative, etc, among municipalities within FUAs. This can capitalise on successful networking and collaboration schemes to strengthen inter-municipal co-operation within functional areas.

Building stronger partnership and collaboration mechanisms across levels of government

- Municipalities within FUAs could **officially designate a person(s)/team(s)** to support the mayor, **in charge of seeking and establishing co-operation with the voivodeship and/or national government.** These person(s)/team(s) should clearly define needs, opportunities and objectives for co-operation, establish and monitor co-operation agreements/co-financing and evaluate the results/outputs of the co-operation agreements.

- **The national government could develop specific territorial contracts targeting metropolitan areas.** These should be done by clearly specify the priorities that can be financed through contracts, based on a careful assessment of needs and opportunities in municipalities and the FUAs. Funding could be especially dedicated to contracts signed by groups or networks of municipalities. National government should ensure that the procedures to establish a territorial agreement are simple, in view of greater uptake of these instruments by municipalities.

Moving forward with the governance of metropolitan areas

- **Introduce legal arrangements to recognise the special status of metropolitan areas,** with specific powers and responsibilities (e.g. transport, spatial and local development planning, socio-economic development) as well as adequate funding to match their responsibility. A legal act might be needed for this to happen.
 - A metropolitan governance structure needs to manage either its own resources, a transfer from the national level, municipal contributions or a combination of all three. To start, specific tax regimes for inter-municipal groupings or metropolitan areas could be promoted without taking resources away from the municipalities.
- **Allow experimentation when establishing flexible metropolitan governance models.** Poland could take advantage of the Metropolitan Association of Upper Silesia and Zagłębie (Górnśląsko-Zagłębiowska Metropolia (GZM Metropolis)) as a pilot experience in the devolution of competencies as a way to ensure a gradual institutional change and “learning by doing”. In order to scale up the pilot experiences, an enable regulatory framework should be in place to evaluate and validate the pilot action results and provide the possibilities and resources to scale up the metropolitan governance models or good practices.

6. Toward a more strategic and effective local government workforce

Recommendations for larger municipalities

Invest in employer branding. Working for local government can be a great career choice – but many potential candidates do not perceive it that way. Larger municipalities may have more scope than smaller ones to identify aspects of their employment package that appeal to candidates eager for impact, autonomy, and the chance to work for the public good. This can refer to work-life-balance, career advancement opportunities, and sense of impact. Comprehensive employer branding strategies go beyond harmonised logos and websites to showcase the work and worth of employment opportunities at all levels of the organisation.

Invest in improving HR data availability and performance. Across the OECD, human resource units have access to a variety of workforce data. Many struggle to use it to improve policies. Larger municipalities in Poland with the technical skills could work toward developing ‘dashboards’ or metrics on aspects of workforce management to be presented to senior leaders and managers. Typical metrics used in HR management include application volume, the time taken to hire candidates, employee turnover, and more sophisticated metrics could include visits to career websites, success of recruitment campaigns, and analysis of diversity in the workplace (e.g. balance between men/women at different hierarchical levels). Larger municipalities could also explore launching employee surveys, which generally work better when there is a large number of potential respondents.

Explore ‘mobility’ or short-term secondment programmes. Larger municipalities resemble Ministries at central level in some OECD countries in terms of the size and scope of their activities. Developing new skills and boosting engagement is a core component of many mobility programmes which allow public servants to work temporarily in another part of the public sector. There was little evidence of widespread

use of mobility programmes in municipalities, but with careful planning and engagement with leaders, they could add to workforce flexibility and performance.

Recommendations for smaller municipalities within this type

Smaller municipalities should explore opportunities to collaborate with each other. Given the varying sizes of municipalities, and in particular the size of smaller ones, an overarching focus should be on identifying opportunities to collaborate and share experiences on common challenges and solutions. While the following recommendations can indeed be considered individually by municipalities, developing economies of scale through partnerships and communities of practice can generate more meaningful solutions to local challenges:

- **Shore up induction programmes:** Staff in municipalities undertake a six-month induction programme called 'preparatory services' after which their employment contract is confirmed. For smaller municipalities with lower volume of new hires during the year, there is scope to focus the training content on transversal competencies and align it more explicitly with candidate expectations and preferences. Rather than seeing the preparatory service as a mandatory obligation that concludes with a test of substantive knowledge, this period can be used to transmit organisational values and improve engagement, motivation and ultimately retention and performance.
- **Make use of employee engagement exercises:** In many municipalities, particularly smaller ones where there is a tight-knit and small team, employee engagement exercises can be a way to complement and constructively challenge 'common knowledge' or established ways of doing things, and give staff the opportunity to voice suggestions.
- **Enhance needs analysis to design learning and development opportunities.** Training in many municipalities is conducted in an ad-hoc manner on the basis of offers received from training providers. While this can in some cases respond to legitimate needs, such as developments in relevant legislation, smaller municipalities could benefit from conducting a needs analysis of staff members' training preferences. The needs analysis could cover types of training (classroom, online, scenario-based, mentoring, job-shadowing, etc.) that staff feel is valuable and place a greater emphasis on transversal competency development.

7. Open Government

Improving existing open government initiatives and fostering further stakeholder participation:

- Establish a system that ensures an institutionalised commitment to dialogue and consultation with civil society actors at each stage of formulating the local development strategy (LDS) to guarantee that all stakeholders in society, including vulnerable, under-represented and marginalised groups, have a seat at the table.
- Use information and communication technology mechanisms and tools such as online consultations to reach and involve more stakeholders.
- Establish or empower existing youth and senior councils by expanding the scope of their responsibilities beyond issues solely related to youth or seniority and ensuring that the outcomes of consultation with these councils is adequately reflected in the decisions made.
- Municipalities with more capacity to do so could attempt to expand the percentage of the budget/funding involved as well as the range of stakeholders participating year-on-year by conducting awareness-raising campaigns and reaching out to specific demographics through different means.

- Endeavour to implement deliberative mechanisms, where governments assemble ordinary citizens from all parts of society to deliberate on complex political questions and develop collective proposals (citizens' assemblies, juries, panels), to increase citizen participation on the scale that best suits their own capabilities and the human and financial resources available.

Taking a strategic approach to open government:

- Larger municipalities could develop a standalone document in the form of a programme, strategy or policy that can provide this strategic view to co-ordinating open government initiatives. If smaller municipalities lack the resources or capacities, they could instead dedicate a component or chapter of their local development strategy to open government. To do so, municipalities could include some of the main components of a strategy: objectives, priorities and initiatives for its implementation.
- Municipalities could assign a single office or person with the mandate of co-ordinating the open government initiatives as well as of monitoring and evaluating their implementation and impact. When doing so, municipalities could ensure that their mandate is clear and well-disseminated and outline the main responsibilities to ensure the effective operationalisation of open government initiatives.

Creating an open government culture in municipalities:

- Municipalities could take advantage of their location and conduct conferences, fora and debates on these topics as well as carry out an internal communication campaign through different channels to ensure that public officials know the benefits and potential impacts of open government reforms. Having an accessible document that presents open government with simple actions in plain language could also contribute to raising awareness among public officials.
- Explore the possibility of co-implementing open government initiatives and training programmes for public officials with other neighbouring municipalities to share costs and increase impact. This training could introduce upskilling and capacity-building on open government, which would provide public officials with the knowledge and skills needed to embed the principles of transparency, accountability, integrity and stakeholder participation into public decision-making. This approach would also enable further communication on the benefits of open government both within the administration and with external stakeholders to increase their buy-in and allow them to better engage with other stakeholders in the policy-making process.

8. Reducing administrative burden and simplifying public procurement

Assess the administrative burden generated by administrative processes and formalities

1. Assess the administrative burden faced by citizens and businesses of the municipality. This exercise will help the LGUs identify the processes and formalities more cumbersome (in terms of their administrative burden and in terms of the number of applications/requests per year) and focus their resources on them.
2. Simplify the procedures identified through the assessment phase. LGUs can reduce red tape by streamlining processes, eliminating excessive requirements, using simple language, making information readily available and easy to understand, and by collaborating with other public institutions to exchange information.
3. Introduce one-stop shops that are user friendly, up to date and that go beyond business creation and management. When possible, create transactional platforms (physical or digital) that allow citizens and businesses exchange information and documents with the administration.

Increase transparency in the interactions with stakeholders

1. Strengthen the formal interaction channels in place and make them accessible to everyone.
2. Consider setting up of dedicated channel for procurement questions by suppliers, e.g. via a hotline or FAQ page.
3. Provide capacity building for officials on how to communicate information and interact with stakeholders.

Make use of digital tools for simplification of procurement and the provision of information and services

1. Proactively adopt digital tools that allow for simplification of procurement (e-procurement) and train staff and suppliers for its use through e.g. introducing a practical guide.
2. Strengthen the digital tools currently in place. Regarding the back office, ensure that officials receive adequate training and guidance for the correct management of digital tools. For the front office, keep the objectives of the platform and the needs of the users always in mind.
3. Create feedback mechanisms that enable the continuous improvement of the digital tools in place, as well as the development of new ones.

Strengthen collaboration among municipalities to shape and adopt public procurement reforms effectively

1. Work to identify forthcoming changes in the public procurement legislation, and take steps to ensure that all procurement officials are able to successfully adapt to changes in the public procurement law. This could take the form of establishing a focal point in the Association of Polish Cities (*Związek Miast Polskich – ZMP*) that could interact with the national government on procurement matters, or the appointment of an LGU on a rotating basis for this task.
2. Coordinate with similar-size and smaller LGUs as well as with the ZMP to strengthen the overall voice of local authorities in upcoming reforms.
3. Develop training mix as it best fits LGU needs, e.g. attending national training, create own training, or outsource training. Training should focus on area that pose difficulties in implementation, such as MEAT criteria. LGUs could also consider creating online training modules in cooperation with PPO and ZMP.

Simplify procurement practices through exchange and sharing, including below threshold strategies

1. Share good practices on established below threshold public procurement strategies with LGUs that are smaller or similar size. A regular event for public procurement could be organised in cooperation with ZMP to this purpose.
2. Disseminate established good practices for simplification, such as tender documents using accessible language.

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Note

¹ The elderly dependency rate is defined as the ratio between the elderly population and the working age (15-64 years) population.