

Two ends of a stick? Regional strategic planning and operational programming in Poland in the context of EU membership

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Two Ends of a Stick? Regional Strategic Planning and Operational Programming in Poland in the context of EU membership.

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Two ends of a stick?

Regional Strategic Planning and Operational Programming in Poland in the context of
EU membership.

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Abstract

The article focuses on the relationship between the strategic planning and operational programming in the Polish regional development policy in the period before the accession to the European Union, and in the first years of the EU membership. Specifically, it offers an analysis of the configuration of legal acts and programming documents, which establish the formal framework for the regional development policy. It is demonstrated that the programmatic framework of the Polish regional policy has been marked by a split between strategic and operational planning and the construction of framework operational programmes, with possible hindering effects for regional development.

Key words: regional policy, strategic planning, operational programming, Poland

JEL classifications: O21, R58

Introduction

The paper addresses the issue of relationship between strategic planning and operational programming in the context of regional development policy in Poland. The prospect of availability of Structural Funds has generated some literature concerned with the regional policy, including regional strategic planning framework. Many of these contributions take either a strongly prescriptive, “how-to-do” approach (KLASIK 2000, KLASIK 2002).

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Alternatively they focus on either the strategy formulation at the regional level (WYSOCKA 2000, GORZELAK and JALOWIECKI 2000, WOJTASIEWICZ 2000, PARTEKA 2000, ZUBER 2000), or on the operational programming (CHURSKI 2006, notable exception: GROSSE 2003). However, one important aspect seems to be missing from that literature, which is the coherence among the various aspects of the regional policy. The relationship between the strategic planning and operational programming has not been sufficiently investigated in the context of Polish regional policy. This is the gap that this article attempts to rectify.

Regional policy has two fundamental components. These are: the institutional framework and the programmatic framework. While the former aspect involves the institutional and organisational structures which design and implement the policy, the latter is concerned with the legal acts and programme documents which constitute the foundation of the policy execution. The principle of programming is part of the formal framework of the EU Regional Policy, and it is fundamental to formulating a coherent economic development policy at any territorial level.¹ For the purpose of reception and allocation of the structural funds, both an institutional system and a programmatic framework have been put in place in Poland. A variety of legal acts and programme documents have been formulated as a foundation for regional policy. Those documents are positioned in a certain configuration and they establish the places and the roles of specific actors in the institutional system. Most important among these documents are development strategies and operational programmes, supposed to indicate the visions, directions, as well as specific actions to be carried out within territorial development policy.

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Regional policy relies on a strategic process where various territorial units formulate their specific development strategies and operational programmes. However, in the context of the European Union, regions and localities do not enjoy a complete liberty to devise and pursue their “own” territorial development strategies as they would please. Their strategies need to function within the institutional regimes and preferences of the European Union and of Member State governments, the latter remaining the primary interlocutor for the EU authorities. This makes the regional policy a multi-level policy, where strategic planning activities take place at many levels of government, from local to European. While this may provoke a valuable interaction and flow of concepts and ideas, there is also the risk of dominance of the higher levels of government over the lower, in terms of contents of the strategic documents and the implementation mechanisms that they establish.

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The paper concentrates on the programmatic aspect of regional policy.² It investigates the configuration of the programme documents, particularly regional development strategies and operational programmes, searching for their hierarchies, mutual relationships, as well as patterns of coherence and continuity. With this focus, it will be demonstrated that in the first period of the Polish membership of the EU, the regional development policy was touched by a split between the regional strategic planning and operational programming, and the construction of framework operational programmes. Both of these issues have been detrimental to regional policy, as they reduced coherence between the policy objectives and actions to achieve them.

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The paper proceeds as follows. The first section discusses the regional policy process from a theoretical view point, focusing on the strategic planning and operational

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programming. There is no intention here, considering their complexity, to offer an extensive account of the intricacies of strategic planning. Rather, the most crucial aspects of strategic planning process are highlighted, to provide a conceptual framework for the analysis of the Polish regional policy process. Section 2 presents the early stages of the Polish regional policy, with the establishment of the regional self-government and the formulation of the first regional development strategies. Section 3 presents the activities of regional policy in Poland before the accession to the European Union, whereas the following section (Section 4) focuses on the period 2004-2006. Section 5 presents the programmatic framework put in place for the EU financial perspective 2007-2013, and the last section concludes.

1. Regional policy process: strategic planning and operational programming

Regional development policy needs to be founded on a programmatic framework (KLASIK 2000, KLASIK and KUZNIK 2001, KLASIK 2002). This means that the policy is written in a set of documents of strategic and tactical character. Most important of this set are regional development strategies and operational programmes accompanying them.

A development strategy constitutes a key policy document for a territory, be it a region, a city or a rural community. It has a conceptual and prospective value. It includes a set of components, established in a certain logical order. Development strategies may be generic, such as regional development strategies, or sectoral and thematic, for instance a regional innovation strategy, a transport strategy, an employment strategy, and the like.

Although there is not a single model of strategy design, a territorial development strategy would normally be composed of a vision, strategic challenges, general and specific objectives, analysis of the past development itinerary and current situation, including SWAT/TOWS analysis (WEIHRIH 1990). The strategy formulation process may start from what is called prospective studies. These include the analysis of the past development itinerary, the current situation and the future options (KLASIK 2002). At this stage the aspects of the region's environment are identified, together with their influencing factors. Strategic analysis, a second step in the strategic process, aims at the assessment of the internal potentialities as well as external opportunities and threats. Frequently, the instruments such SWOT/TOWS are used here.³ With the prospective studies and strategic analysis, the construction of a territorial development strategy arrives at the formulation of a vision, overall strategic objective and specific objectives. Next to this, priorities of action are identified. In the final stages of the strategy formulation process, an implementation system may be preliminarily designed, together with a monitoring and evaluation approach, and a financial outline. These, however, belong primarily to the operational programming, which necessarily accompanies the strategic planning.⁴

The key task of a strategy is to establish an outline of a development path that, in the intentions of the authors, will lead the region from its current situation towards a future state envisioned. While the regional development strategy has a more general and all encompassing value, often covering a lengthy period of time, the task of the operational programming is to specify the development path selected for a territory. For

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the purposes of logic and coherence of the strategic planning process, an operational programme should result from and be rooted in the strategy.

KLASIK (2002: 117) mentions a set of activities taking place within the operational programme formulation:

- the operationalisation of the strategic objectives,
- specification of thematic options and strategic priorities,
- recognition and assessment of the implementation factors,
- step-by-step order of activities,
- financial engineering and allocation decisions,
- the acquisition of new skills, competences and aptitudes,
- implementation of new procedures, instruments, and techniques.

Thus, the task of an operational programme is to specify a territorial development path outlined by a strategy. This happens by the choice of precise fields of action as well as of temporal and spatial priorities. The actions are broken down into discrete projects, prepared by a variety of project proposers. The projects may cover a vast variety of themes and originate from various sectors of the territorial community, such as the business sector, the territorial authorities, and the social sector. The projects may have various sizes and coverage, from local to regional. This opens the issue of selection of projects to be accepted for implementation. Expectedly, the needs and necessities of territorial development may be by far larger than resources available. Prioritising is therefore an inherent component of the regional strategic process.

The regional development strategy should indicate the priority fields of action, which are deemed crucial to the development of a given territory. The operational

programme in turn should introduce more specific actions and projects, and place them in a certain order of importance, either in temporal terms (what is to be done first?) or in content terms (what is most important to be done?). A useful instrument, originating from the practice of project management, is the project portfolio (WYSOCKI and McGARY 2003, MARTINSUO and DIETRICH 2002, DROBNIAK and FRENKIEL 2001). An operational programme can contain one or several project portfolios, that is, sets of projects deemed of the highest priority to the development of a given territorial unit and expected to produce a significant change in the territory. The several project portfolios may correspond to different fields of action within the territorial development strategy, such as entrepreneurship and innovation, public and private transport networks, information and communication technology, employment and social inclusion, environment protection, and the like.⁵

A regional operational programme needs to be constructed in an open-ended manner. Not all necessary actions or projects may be foreseen at the moment of the first formulation of the programme. The priority list needs to be open for modification. The operational programme requires periodical updating, where new project portfolios are introduced, either from the lower levels of the priority list, or from outside of it, if needed.

The advantage of the instrument of project portfolio is that it allows for coordination and assures coherence among actions and projects carried out on the basis of a territorial development strategy. The projects for each project portfolio should be selected bearing in mind their complementarity and synergic effect. Then as well, a similar correspondence should be assured among the thematic portfolios. Such a

configuration of project portfolios introduced into the operational programme assures the greatest chance of maintaining the regional development path, designed by regional development strategy and the operational programme.

2. Regional government and regional development strategies (1998-2001)

Within the first decade following the demise of the socialist regime, limited changes occurred in Poland, regarding both the territorial organisation of the country and the regional policy. The restoration of democratic self-government was among the postulates of the “Solidarity” movement already in 1980⁶. The first post-socialist government, led by Tadeusz Mazowiecki, re-established the democratic elections to local authorities at *commune* level. Apart from this, still during the first parliamentary term, works were undertaken towards a larger territorial reform, aiming at the reintegration of the existing forty nine administrative units into larger regions. However, with elections lost in 1993 and re-entry into office of the former socialist block, the territorial reform was treated as a non-priority. Only upon the return to power of the Solidarity government in 1997, the regional issue was reopened. Legislative and preparatory activities took place throughout 1998, and resulted in a large-scale territorial reform, modifying the borders of territorial units, establishing democratic bodies, and defining their competencies. Forty nine administrative units were replaced by sixteen large regions, historically called *województwa*. Each region received a democratically elected assembly named *Sejmik*. The executive competencies were conferred to Regional Boards, headed by Marshals. The latter were to be assisted by Marshal Offices, that is, regional public administrations.

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3 However, at the same time, the office of the state-nominated *Wojewoda* was retained, to
4 assure supervision and control by the central government of the regional self-government
5 actions (GORZELAK 1999).⁷
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10 The Law establishing the regional self-government (adopted 1998, in force as of 1
11 January 1999) placed on the regional authorities a set of responsibilities regarding the
12 regional development policy. Most notably, the regional self-governments received the
13 task of formulating regional development strategies, as fundamental planning documents.
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15 The Law stipulated as well that the regional development strategies would be
16 implemented by “regional programmes”. For some reason, the word *operational* was
17 avoided in the text of the Law, but this document was to result from the strategy and give
18 it an operational value.
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29 With only one exception, the works on the regional development strategies ran in
30 all regions between 1999 and 2000.⁸ All regions took the liberty of establishing their own
31 organisational and institutional systems for the task of formulation of the strategies, as
32 well as for deciding the scope, the architecture and the contents of the documents. This
33 led to a large differentiation of the regional strategies, with resulting difficulty of
34 comparison. As GORZELAK and JALOWIECKI (2001) argue, the strategies lacked a
35 common language, similar understanding and use of basic concepts such as strategic
36 objective, operational objective, or a priority. Furthermore, the segmentation of the
37 regional development strategies may also be seen in the weakness of coordination of the
38 regional policy formulation at the state level or within groups of regions with similar
39 characteristics and potential. Several such groups calling for some form of joint planning
40 and actions can be distinguished. One such group are the southern regions, with mountain
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landscapes and a strong tourism potential. Another can be seen in the maritime regions in the north, and the regions along the eastern border. However, the first strategies were by far inward-looking and the mechanisms of inter-regional cooperation were poorly developed. While this somewhat negative judgement of the strategies may be to some extent just, it needs to be borne in mind that the formulation of the regional development strategies was one of the very first tasks of freshly established regional governments. Technical competence might have been limited regarding the strategic planning process, and in many cases academic and other experts were employed to assist the works. The formulation of regional development strategies, remaining almost entirely in the discretion of the regional authorities, constituted a first and valuable institutional experience in the field of regional development policy.

3. Regional development policy in the pre-accession period (2001-2004)

While the regional authorities were involved in the design of their first programmatic documents, the state-level legislator continued developing the national framework of regional policy. Among the first documents was the “Law on the Principles of Support to Regional Development“, adopted on 28 December 2000.

The Law put in place a regional policy architecture for the early phase of regional development planning and implementation in Poland. It did that by, first, establishing a hierarchy of policy documents and a configuration of actors involved in the policy process. Second, it laid down the principles and forms of support by the government to regional development. Third, it specified the manners of cooperation in the field between

the Council of Ministers and other agencies of both government and self-government. It is worthwhile noting the terminology used by the Law. The “support to regional development” was defined as follows:

“territorially oriented and comprehensive actions carried out by the Council of Ministers and the government administration for lasting socio-economic development and the protection of natural environment, undertaken in cooperation with the units of territorial self-government and social and economic partners”
(Art 2, p. 1)

This definition, while speaking about support, positioned the Council of Ministers, that is the state government, in the central place of the policy, and it mentioned the other actors in the second position. The term “social and economic partners” was specified as entrepreneurs, employers and their organisations, trade unions, non-governmental organisations and scientific institutions, whose range of activities included aspects of regional development (Art. 2, p. 2). The programmatic framework established by the Law is presented in Figure 1.

Figure 1. Programmatic framework established by the Law on the Principles of Support to the Regional Development (2001-2003)

In this manner, the Law established a hierarchy of policy documents, each with different level of abstraction and scope of impact. At the regional level, the development strategies and regional (operational) programmes were formulated. At the state level, a National Strategy of Regional Development 2001-2006 (NSRD, Polish acronym NSRR)

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was to be a general strategic document applicable to the entire state territory. The Support Programme was a second state level document in which the range, the mode and the conditions of the state support to the implementation of the regional programmes were defined. This was the first operational document on the side of the central government.

Thus, both the regions and the state were equipped with their own instruments, of strategic and operational value, in which they spelt out their expectations concerning the regional development. This offered the ground for a negotiation procedure, in which the two sides were to agree on the actions to be taken in the regions. The negotiations led to the signature of “regional contracts” between the central government and the regional governments, specifying projects to be carried out and financed jointly by the regional financial resources and the state contribution.

It was exactly the financial aspect, however, that constituted the controversial element of the regional policy at that first stage. As many analysts critically point out, the far reaching territorial reform was not followed with an adequate decentralisation of state finances. The regions were given a substantial set of tasks in the field of regional policy, without being assured the corresponding material means to realise them. This created a strong dependence of the regions upon the behaviour of the central government, both in decisional and financial terms (GILOWSKA 1999, GILOWSKA 2001, SEPIOL 2001). As GILOWKSKA argues:

“What follows from the content of the Law on Principles of Support to Regional Development, is that [...] there will be no regional policy whatsoever. Instead, there will detailed procedures of “begging” by the regional self-government for

the financial resources remaining in the discretion of the government administration (GILOWSKA 2001: 149).”

The first edition of regional contracts was signed in June 2001, following a long and complicated preparation procedure. The requirements set by the government to the regional authorities were rather burdensome and outwardly bureaucratic. The regional authorities were obliged to “apply” for financial contribution to the central government. The application was an extensive set of documents and attachments, with multiple and detailed justifications of the projects proposed, and references to the state planning framework (GROSSE 2003: 34). This was only the starting point for the negotiation towards the signature of a regional contract between the state and the regional authorities. In those contractual negotiations, the government naturally occupied a dominant position. It is also worthwhile noting that the Law on the Principles of Support to Regional Development stated clearly that the contract could be terminated or modified either by a common agreement between the two contracting parties or by a unilateral decision, which indeed occurred.

In the period of 2001-2002 the regional contracts disposed of a budget of some 13 billion PLN, 60% of which originated from the state budget. The remaining part came from the regional budgets (17%), foreign assistance including PHARE (17%) and other sources (6%)(GROSSE 2003: 38). A third of the state contribution was, however, occupied by so called multi-annual investments, that is, government projects carried out in regions, with origins frequently in 1980s. This amounted to a trick of the central government, which avoided accepting new financial commitments. Furthermore, after the elections of 2001, the new government announced the cancellation of the regional

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contracts altogether, as a consequence the bad financial situation of the state budget. The negotiations between the central government and the regional governments brought a solution, by which the contractual financial allocations for the year 2002 were reduced and spread over two years. In result, the regional contracts were marked by confusion, permanent delays and a feeling of disappointment on the part of the regions (SEPIOL 2001).

While the implementation of the regional policy in the pre-accession period was not free from difficulties, it must be appreciated that in this period the programmatic framework was established. Both the regions and the state formulated a set of documents orienting the regional policy. At the regional level, all regions formulated their development strategies and regional (operational) programmes, as outlined by the Law on the Self-government. The implementation of the policy was limited by the insufficient financial means, at both regional and state level. This was to change with the entry of Poland into the European Union.

4. Polish Regional Policy after EU accession (2004-2006).

However, with the EU accession, the programmatic framework established thus far turned out to be of no use. For the reception of the structural funds, as of 2004, a new programming path was opened.

The fundamental programmatic document formulated by the Polish side with the purpose of receiving the structural funds was the National Development Plan 2004-2006 (NDP). Adopted in January 2003, the Plan was the basis of negotiation between the

Polish Government and the European Commission, leading to the establishment of a Community Support Framework. The NDP was built upon the basis of a number of state-level sectoral strategies, from the National Strategy of Regional Development, through an employment strategy, a rural development and fisheries strategy, to environment and transport strategies. Those foundations of the National Development Plan were reflected in the fields of action designed in the document. The overall objective of the Plan was formulated in the following words:

“The strategic objective of the national Development Plan is to assist the development of a competitive knowledge based economy with entrepreneurship capable of sustainable and harmonious development, assuring the increase of employment as well as the social, economic and territorial cohesion at the regional and state level, as well as within the European Union (NDP 2003: 63).”

Regarding its implementation, the National Development Plan established an architecture of operational programmes, eight in number. All of them were formulated at the state level and the various central ministries assumed the task of programme management. The operational programmes are mentioned in the Table 1.

Table 1. Operational Programmes in the National Development Plan, 2004-2006.

Of interest to this analysis are the facts of adoption of relatively many Sectoral Operational Programmes, and of one integrated operational programme for regional development replacing the previous regional programmes, in view of policy execution at the regional level.

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National Development Plan designed a general strategy of economic and social development of Poland for the first years of the membership of the European Union. Regional policy was seen here as a component of the government economic policy. The great number of operational programmes had the major consequence of consuming the financial means for the regional development. The Integrated Operational Programme for Regional Development received a total of 4.08 billion euros, which was some 30% of the Structural Fund allocation for Poland in the period 2004-2006 (13.8 billion euro). This amount then needed to be divided among all sixteen Polish regions.

In 2002 the regional administrations embarked on the process of formulation of their regional operational programmes, specifically in view of the availability of the EU structural funds. These documents were written anew, but they were placed in the programming line initiated by the formulation of the regional development strategies and the regional programmes. However, in the course of their work the regional administrations were informed of the works being also undertaken by the central government, within the Ministry of Economy, on a single integrated regional operational programme. Initially, the idea put forward was that the integrated regional operational programme would be composed of a general common part and distinct regional components contributed by the regional administrations. That idea, while still acceptable to the regional administrations, was eventually further diluted. The final version of the IOPRD included only small descriptive sections concerning all the sixteen regions.

IOPRD was formulated as an extensive document counting some 250 pages, including most important parts of an operational programme. It started from the diagnosis of the socio-economic situation of Poland – and its regions – on the entry of the NDP into

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3 force. It included an ex-ante analysis of IOPRD, and a summary of the regional policy
4 carried out in the period 1990-2002. In the following chapters the Programme put down
5 the regional development strategy for the period 2004-2006, the objectives and the
6 principles of the state regional policy, the specific priorities and actions to be
7 implemented within the Programme. Last chapters of the Programme dealt with the
8 financial issues and the implementation system. The specific regions appeared only in the
9 annex, with small descriptions, not exceeding three pages each.

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11 A key section of the IOPRD was the layout of Priorities of regional policy,
12 divided into Actions. It should be observed that the Programme, with so conceived
13 priority set, did not contain any regionally specific development path or strategy. The
14 priority set was constructed rather as a catalogue of admissible activities that might be
15 financed from the EU structural funds, accompanied by the national and regional
16 resources. In this way the IOPRD, even though it was nominally an operational
17 programme, did not specify in operational terms the regional development strategy of any
18 individual region. It was rather a framework programme, to be filled in with specific
19 projects and activities selected and carried out in the regions. The priority layout of the
20 IOPRD is presented in the Table 2.

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46 *Table 2. Priority layout in the Integrated Operational Programme, 2004-2006.*

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51 What was required then was an institutional system to carry out such project
52 selection. The IOPRD did not fail to design such a system. While the Ministry of
53 Economy received the responsibility for the overall management of the Programme, this
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responsibility was delegated to a variety of regional institutions, which implemented the various Priorities and Actions of the IOPRD. The regional governments were responsible for the implementation of the Priorities One and Three of the Programme. The implementation of The Priority Two, concerning the human resource development, with projects financed from the European Social Fund, was to be implemented by the Regional Employment Offices (REO). These report to the regional governments, but are to a large extent independent of them. Last, the Actions of IOPRD dealing with entrepreneurship support were implemented by the Regional Development Agencies (RDA), equipped with the appropriate experience in the matter. For those three aspects of the implementation of the IOPRD, three different project selection paths were designed. For projects in the fields of human resources and entrepreneurship, the respective implementing institutions established Project Evaluation Commissions, responsible for the project assessment and selection. The final decision concerning the projects to be financed from the respective structural funds belonged to the top management of the implementing institutions.

A more complex project selection procedure was put in place for the ERDF financed project within the Priorities One and Three of IOPRD. Here, the Marshal Offices received the projects from a variety of proposers, assuring formal assessment. Following this two bodies were involved in the selection. A Panel of Experts was responsible for the technical evaluation of potential projects. Resulting from this was a ranking list of projects, all marked with a number of points. The ranking list was then transmitted to a Regional Steering Committee (RSC). This body was composed upon the principle of partnership, bringing together the public authorities at different territorial

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3 levels (central government, regional and local governments) as well as a variety of social
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5 and economic partners (business associations, non-governmental organisations,
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7 universities, and the like).
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10 The Regional Steering Committee had several tasks. One was the endorsement of
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12 general annual programmes for the activities of implementing institutions of the human
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14 resource development and entrepreneurship projects (REOs and RDAs). A more
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16 important task was the participation in the project selection to be financed with the ERDF
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18 (Priorities One and Three of IOPRD). Here the RSC was entitled to modify the order of
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20 projects on the ranking list generated by the Panel of Experts. While the Panel of Experts
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22 applied only technical criteria in their project assessment, the RSC took a broader
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24 perspective and reviewed the projects in light of social, economic and political criteria. A
25
26 number of interviews with the members of the Regional Steering Committee proved,
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28 however, that the actual role of the RSC in all regions investigated was weak. The
29
30 modification of the ranking list orders were infrequent, for reasons such as great
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32 complexity of the technical documentation of projects, lack of time for preparation for
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34 meetings, and otherwise weak involvement of its members in the works of the
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36 Committee. This can hardly be reproached however, considering the great amounts of
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38 documentation to be read, and time-consuming analysis.
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46 Furthermore, the Regional Steering Committees, with their mixed composition,
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48 frequently fell into political dynamics of self-interest and particularism. Members of the
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50 Committee, particularly representing the regional and local government, would be
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52 inclined to promote projects originating from their own place of origin, or the political
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54 colour. Coalitions would appear, to block some projects and promote others. Although
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these phenomena were visible with different intensities in various regions investigated, they were discovered in all regions targeted.

Most importantly, it needs to be noticed that all those project selection procedures had one common feature. While they were decisive to the allocation of the EU structural funds, they were designed in IOPRD as competitive procedures. The introduction of a single regional operational programme, identically binding for all the regions, meant that the strategic planning and operational programming were decoupled. The IOPRD, designed by the central government, did not result from any of the sixteen regional development strategies. It did not specify any precise regional development path. Neither did it include any coherent project sets to be implemented in any region. It was rather a framework programme, offering a set of guidelines and reference points to the projects prospers. This generated an uncontrolled supply of projects, whose number and financial value by far exceeded the available financial means.⁹ Thus, the projects competed with each other for acceptance. Stemming from this was the fact that the projects were not designed to work in complementarity with each other; rather they worked against each other. The admission of one project meant rejection of another. This virtually eliminated the possibility of maintaining a coherent and regionally specific development path, as coordination of actions, expressed in projects, was severely reduced. The members of Panel of Experts worked in isolation. The members of Regional Steering Committee were supposed to assess the match between the projects and the regional development strategies and but not their mutual linkages and complementarities. Thus, it is plausible to argue that the concept of regional operational planning featured in the IOPRD, as well as

an institutional system established by it, seriously reduced the strategic value of the regional planning process.

Several arguments appeared in interviews concerning the reasons for the adoption of a single integrated operational programme instead of sixteen regional programmes. One of these was that it was a temporary solution, accepted in light of the short programming period, of three years only. The management of sixteen operational programmes would be too costly and not worthwhile developing for such a short period of time. A second argument voiced was that the regional administrations, freshly established, were not mature enough and sufficiently prepared for the management of large scale financial programmes. In that view, the state, possessing a well developed apparatus, was found in a better position to assume the management tasks of the entire EU structural funds operational framework, at least in the initial period. Notably, this last argument turned out convincing for the European Commission as well, which did not support decentralisation of the Polish regional policy framework at the time and joined the Polish government on the issue of adoption of a single integrated regional operational programme.

In the following section, the attention turns to the programming period 2007-2013 and the modifications of the Polish regional policy foreseen for that.

5. Strategic and operational planning for the period 2007-2013.

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In early 2004, preparatory works started in view of the formulation of a National Development Plan 2007-2013. A draft version of the new NDP was completed in June 2005. In its introductory section, the draft NDP stated the following:

A matter that needs to be tackled while reformulating the NDP is the establishment of an institutional system of government and self-government power, which will assure the effective achievement of the objectives of regional development policy. So far, in spite of reformatory efforts, there has been limited success in the establishment of such an institutional system, and for this reason, the capability of effective development activities is reduced. We zigzag chaotically between centralisation and decentralisation, between the sectoral and horizontal approaches, between accenting the ministries or the self-governments (NDP 2005: 4, own translation)”

However, this appraisal did not translate very well into the actual redesign of the strategic and operational planning framework, as put forward by the new NDP. While the reintroduction of sixteen Regional Operational Programmes (ROPs) was accepted, the NDP foresaw no fewer than eleven governmental Operational Programmes. The word ‘sectoral’ disappeared from their names, but those programmes would be managed by respective ministries. As before, they were bound to consume the financial resources allocated to ROPs.

The National Development Plan, however, was rejected in its entirety. The national election of autumn 2005 brought the change of the parliamentary majority. The incoming government embarked on the design of its own programmatic and institutional framework for the regional policy under its term. The new government proceeded rather

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3 quickly with the formulation of a document entitled “National Cohesion Strategy /
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5 National Strategic Framework of Reference”, equivalent to the National Development
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7 Plan, as the of negotiation basis with the European Commission.
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10 In the framework of the NCS/NSFR the sixteen Regional Operational
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12 Programmes were maintained. The number of the state level Operational Programmes
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14 was reduced to five, and thus consolidated. The new programmatic framework is
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16 presented in the Table 3.
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22 *Table 3. Operational programmes in the National Cohesion Strategy (2007-2013)*
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27 With the introduction of the Regional Operational Programmes, intended to
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29 replace the Integrated Operational Programme, the regional authorities admittedly
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31 received a somewhat greater scope of freedom in devising the operational frameworks for
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33 their regional development strategies. The freedom concerned both the adoption of the
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35 content of the regional operational programmes and the establishment of institutional
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37 systems operating at the regional level and implementing the regional policy. While the
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39 scope might have been greater than in the framework of the IOPRD, it was not unlimited,
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41 as it was still submitted to the European Union’s and the Polish government legal
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43 provisions, guidelines or indications.
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48 Nonetheless, several matters need to be noted. Firstly, Regional Operational
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50 Programmes constitute implementing instruments for only one of the Structural Funds of
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52 the European Union, which is the European Regional Development Fund. The resources
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54 of the European Social Fund will be allocated through the Operational Programme for
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Human Capital. This resulted from the strict preference of the European Commission, insisting on the adoption of “single-fund” operational programmes. This may result, again, in the centralisation of this aspect of the regional development policy within a single operational programme, suffering from weaknesses similar to IOPRD.

Secondly, a novelty in the Regional Operational Programmes is that they contain what is called key project lists. These are sets of projects formally written into the ROPs, deemed of the highest priority to the given region. Once accepted, they were placed in the ROPs for definite implementation. In this manner a sort of project portfolios appeared in the ROPs. However, here again, a competitive selection procedure was applied. The projects were initially submitted by various project proposers and evaluated by the regional government services. The example of the key project set in Mazowieckie region is illustrative. 26 key projects were selected from 166 proposals. Only in some cases – for example in Silesia – social consultations were carried out specifically concerning the choice of the key projects; for majority of the regions the final decision was taken by the regional government. An initial review of the key projects leads to the observation that project sets so construed are not very coherent. Rather, most of the projects selected are stand-alone projects, working separately from the others. Lastly, the key projects occupy only a part – larger or smaller – of the total financial allocation for a given region. For the remaining part, a catalogue of admissible projects, with priorities and actions phrased similarly to the ones of the IOPRD, was designed in every Regional Operational Programme. With this, again, a variety of competitive project selection procedures were put in place. The chief weakness of the IOPRD, as has been argued here, seems to continue in the Regional Operational Programmes.

Still, some regions have proven somewhat more innovative in the design of their Regional Operational Programmes. A good example is provided by the region of Silesia, in south of Poland. It is a region characterised by a strong and historically rooted internal diversity, touching on all aspects: economy, cultural profiles, and landscape. The region is dominated by a central agglomeration of some fourteen cities, concentrated around its capital of Katowice, and marked by an extreme density of heavy industry in decline. The northern part of the region, with the city of Czestochowa, as well as the region's south, with the city of Bielsko-Biala, both manifest very different landscapes and socio-economic profiles. The northern edge of the region is characterised by a lesser intensity of heavy industrial activities, and it has a significant tourist potential, with a famous sanctuary located in Czestochowa. The southern part of the region is marked by a mountain landscape, and a concentration of light and medium industries, including automobiles, textiles, and machinery in Bielsko-Biala, or production of beverages in Zywiec. Within the strategy design process in 1999-2000, the Region of Silesia was divided into four subregions, corresponding to those distinguishable territorial entities. The fourth subregion was located in the south-west of the region, with the main city of Rybnik.

The Regional Operational Programme of Silesia put in place three different project selection paths. The first path is similar to the competitive approach of the IOPRD. Within this path, the various project proposers are to submit projects for assessment and selection to be financed with the EU structural funds. The responsibility for the selection will be placed on the Regional Board, the executive branch of the regional government. The Regional Steering Committee will not participate in the

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process. It will be replaced by the Regional Monitoring Committee, acting from *ex post* position to assess the policy actions of the regional government.

Next to this, the Silesian ROP included a key projects list. The process of introduction of the key projects into the ROP was long and political. The initial versions of the ROP, put forward by the regional government, featured a set of three key projects, which happened to be placed within or close to the central agglomeration of Katowice. This raised objections of the other subregions, which claimed the right to introduce key project to be located in their territories. The objections were respected, and the final version of the ROP features a key project portfolio with 12 projects to be carried out in different subregions.

Apart from this, another project selection path established a different level of operational programming. During the consultation process of the ROP, the subregional authorities voiced postulates for a further decentralisation of the allocation procedure within the region. Responding to these postulates the regional government reserved a part of the total sum of the structural funds available to Silesia in 2007-2013 period for a subregional allocation. This would rely on subregional operational programmes, called in the ROP *Integrated Subregional Operational Programmes* (ISOP). The formulation of the ISOPs would be the task of new bodies, such as associations established at the subregional level, brining together local actors with interest in the development of the given subregion.

The sum to be allocated to the four ISOPs was set initially at 25% of the total Silesian allocation of structural funds for the period in question. However, in the last version of the ROP the allocation for the key project set and the ISOPs was combined and

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3 set at the level 40% of the total allocation. Thus, the ISOPs will be financed with the part
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5 of financial allocation that remains after the acceptance of the key projects located in the
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7 given subregion. At the closure time of this article, no working versions of ISOPs were
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9 available, being at an early stage of formulation. The subregions were given the deadline
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11 of June 2007 for the submission of their ISOPs to the regional administration.
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15 Arguably, introduction of the regional operational programmes has opened some
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17 opportunities for the regions to design their proprietary development approaches,
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19 integrating the strategic and the operational aspects of the regional policy. But there is
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21 still a lack of political will for further decentralisation of Polish regional policy at the
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23 state level. A proof of that is supplied by the new legislation for regional policy. The Law
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25 on the Principles of Regional Development Policy (adopted on the 6 December 2006) has
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27 introduced two controversial stipulations. First, it has formally envisaged the
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29 establishment of “regional conferences”, supposed to bring various regional actors onto a
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31 debate platform. But the chairmanship of the conferences is to be assumed by *Wojewoda*
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33 rather than the democratically elected Marshal of the region. This gives to the state
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35 authorities in the region a potentially strong influence on the conceptual orientation of the
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37 regional policy. Secondly, the Law gives a blocking competence to *Wojewoda* for the
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39 project selection decisions taken by the self-government authorities. Formally, such
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41 derogation may take place only if there are noticeable and evidenced improprieties. But
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43 there are good grounds to suspect that this rule may be used and abused for political
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45 reasons, for instance, in case of political colour differences between the self-government
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47 and government. The two legal novelties have been strongly opposed by the self-
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government, the regional policy experts, as well as the European Commission. A modification of the Law can be expected.

Conclusion

In view of the reception of the EU Structural Funds Poland has established an elaborate system of regional policy. The policy was formally formulated in a set of programmatic documents, which defined the strategies, priorities and methods of allocation of resources available. The regional policy, in its current form, was initiated in 1999. The eight-year period since then may be divided into the pre-accession period, and the first years of the EU membership.

In the first period an institutional and programmatic foundations were indeed laid down. A number of strategic documents were formulated at the various levels of government. Most importantly, the newly established regional governments formulated both regional development strategies and programmes of operational character. However, a weakness of the territorial reform, which was the limited financial autonomy, caused that the regional policy was carried out around a contract between the regions and the state. The state budget continued to be the primary source of the financial means of the regional policy. This put the regions in the position of applicants to the state for the decisions concerning financial support. The government reserved discretion with regard to those decisions, and did not refrain to use it.

The perspective of accession to the European Union necessitated the construction of an institutional system specifically for the management of the EU structural funds.

Here, the institutional system that had been established was not adapted for this purpose. While the practice of regional contracts continued, a different mechanism was initiated to deal with the structural funds. The National Development Plan designed the state level strategic framework, and introduced a large set of operational programmes, majority of which were sectoral, and managed by the central government. The one regional operational programme was integrated, which meant that it was identical for the sixteen regions. In this manner the operational programming was decoupled from strategic planning, as the single operational programme was superimposed upon sixteen different regional development strategies. The Integrated Operational Programme was constructed as a framework programme, including a set of fields of action – named ‘Priorities’ – as reference points for the project proposers. It did not consider any regional development path and it left out regional specificities. Neither did it include any regionally specific set of actions or projects, which would be deliberately and logically selected in view of the regional development objectives. Instead, it established several competitive project selection procedures, making it difficult for any projects to be selected in a coordinated and coherent manner. In consequence, IOPRD lead to the supply of projects by far exceeding the financial means available, creating the need of elimination. The result was the rivalry among projects and disappointment among project proposers. Altogether, although many projects have certainly been carried out with good result, the political dynamics engendered by IOPRD cannot exactly be seen as conducive to regional development.

The programming period 2007-2013 offered an opportunity for modification of the institutional set-up. In the National Cohesion Strategy the number of Sectoral

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Operational Programmes was reduced, and the Regional Operational Programmes were restored. This enabled the regions to design their own strategic frameworks and institutional solutions for project selection and resource allocation. An example of an innovative approach is provided by the Silesian Regional Operational Programme, which introduced three different project selection paths, including a key project portfolio, and subregional operational programmes.

In light of the above analysis, it is plausible to argue that the initial period of the Polish regional policy, from 1999 to 2006, was insufficiently used for institutional and programmatic preparation for the reception of the structural funds. The institutional continuity among the different periods and solutions has been weak. By imposing a vast part of the programmatic framework, the state retained a great deal of decisional competence, pre-empting the room for regions to design their proprietary institutional systems and test them in practice of regional policy. The programming period 2007-2013 opened with a new institutional system, different from the two previous. Thus, institutional learning is bound to take place anew, with inherent errors, blockages and delays.

In the first years of the membership of the European Union, the Polish regional development policy seems to be determined by the argument of effectiveness. The competitive project selection procedures are supposed to produce the choice of “the best projects”. Thus, a vast majority of regional development projects are designed and put forward separately from and in competition with each other. Arguably, this undermines the very argument of effectiveness, as the coherence of the regional policy actions is

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3 reduced. This offers the ground for postulating a different model of regional policy. Such
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5 a model may be the object of further research.
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16 End Notes
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21 ¹ Article 11, Council Regulation (EC) 1083/2006 of 11 July 2006 laying down general
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23 provisions on the European Regional Development Fund, the European Social Fund and
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25 the Cohesion Fund, and repealing Regulation (EC)1260/1999
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31 ² This article results from a doctoral research project, carried out between 2003 and 2007
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33 at the University of Leuven, in Belgium. The research project, entitled 'Policy Networks
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35 and Regional Development Strategies in Poland', involved extensive document analysis
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37 and some 75 interviews carried out in three Polish regions: Silesia, Wielkopolska and
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39 Lubelskie. The institutional and organisational structures in the Polish regional
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41 development policy, with a specific focus on the principle of partnership, are discussed in
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43 a separate forthcoming publication.
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50 ³ The letters of the acronym mean respectively: Strength, Weakness, Opportunity, and
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52 Threat. The different order of the letters relates to the preference of accent in the strategic
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54 analysis. If there is interest in building a strategy on the use of strengths and addressing
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56 of weaknesses of a territory, the SWOT analysis is applicable. Alternatively, TOWS
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analysis allows starting from the identification of internal or external opportunities and threats, and the construction of a development strategy upon the management of these. Best effects, however, may be achieved by a combination of the two approaches.

⁴ An alternative approach to the construction of a strategy, starting from the value set of a territorial community, and its vision for the region, is offered by SZCZUPAK and BIENIECKI (2004).

⁵ With regard to the priority level of projects, Pietrzyk argues that projects cannot descend too far to the micro-local scale as the regional policy requires what she calls the “critical mass” to trigger a durable development dynamics (PIETRZYK 2002: 32)

⁶ Final Communiqué of the First Congress of Independent Self-Governing Trade Union Solidarnosc, Gdansk 1980, point 21

⁷ A distinction must be made between the historical regions in Poland and today’s regions. The territorial units just under the state territory correspond to EU NUTS II level. They have historical names, but they do not exactly correspond to the historical regions, from which they inherit their names. Silesia is the best example here. Historically, it covered four of the current Polish regions: *Slaskie*, *Opolskie*, *Dolnoslaskie* and *Lubuskie*, as well as part of today’s Czech Republic and Germany. In cases of other regions the current borders are different from the historical borders as well, and it has to be remembered that the borders of the Polish state and of its regions changed more than

once in the past. The Polish word *województwo* is sometimes translated as into English as *voivodeship*. But throughout the text the word “region”, found in several European languages including Polish, is preferred for stylistic and practical reasons.

⁸ While fifteen strategies were completed in 2000, the Regional Development Strategy of Mazowieckie Region, hosting the capital city Warsaw, was adopted on 31 January 2001.

⁹ In a report concerning the EU structural funds absorption within the IOPRD, the Ministry of Regional Development informed that, by September 2006, the total value of projects submitted amounted to some 250% of the total value of the IOPRD fund allocation. Source: Ministry of Regional Development: <http://www.mrr.gov.pl/Aktualnosci/stanwdrazaniaX.06.htm>

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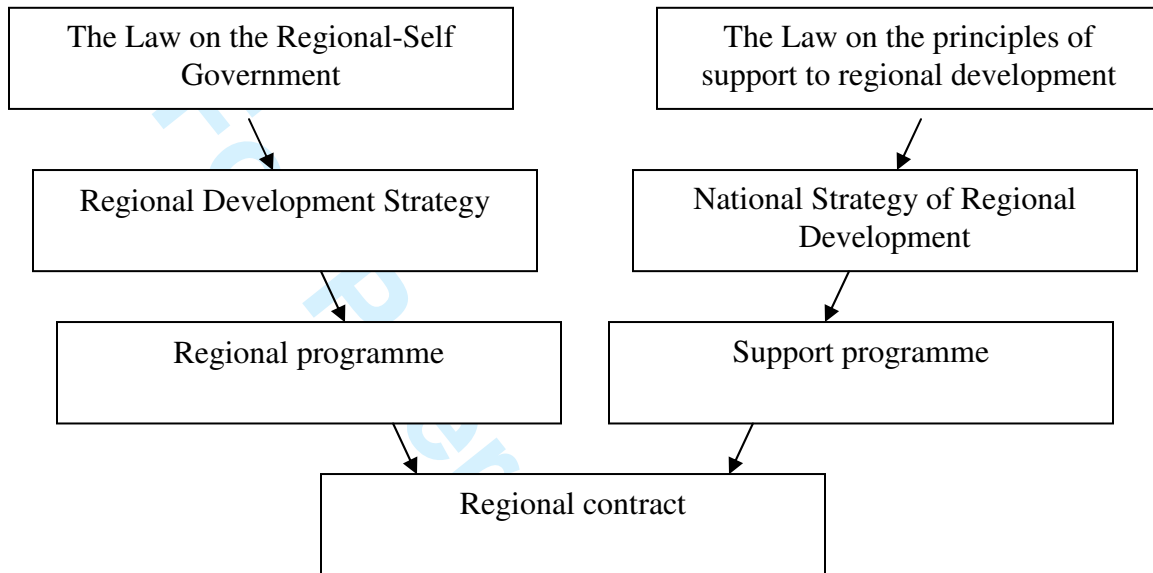
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Figures and tables

Figure 1.



Source: the Law on the principles: (*passim*)

Table 1.

- 1. SOP for Environment Protection and Water System
- 2. SOP for Transport
- 3. SOP for Fisheries and Fish Processing
- 4. SOP for Rural Development and nutrition sector
- 5. SOP for Human Resource Development
- 6. SOP for Competitive Economy
- 7. Integrated Operational Programme of Regional Development
- 8. SOP Technical Support

Source: NDP (2003): *passim*

Table 2

Priority One: “Extension and modernisation of infrastructure necessary for increase of regional competitiveness”

Action 1: Modernisation and extension of the regional transport system

Action 2: Environment protection infrastructure

Action 3: Regional social infrastructure

Action 4: Development of tourism and culture

Action 5: Information society infrastructure

Action 6: Public transport infrastructure in agglomerations

Priority Two: “Strengthening of human resources in regions”

Action 1: Skills development for the regional labour market and continuous education opportunities:

Action 2: Funding for equal educational opportunities

Action 3: Retraining for persons leaving agriculture

Action 4: Guidance of persons endangered by industrial restructuring

Action 5: Entrepreneurship promotion

Action 6: Regional innovation strategies and knowledge transfer

Priority Three: “Local development”

Action 1: Rural areas;

Action 2: Areas undergoing restructuring

Action 3: Degraded urban areas, post-industrial areas and post-military areas

Action 4: Micro-enterprises

Action 5: Local social infrastructure

5.1 – Educational Infrastructure

5.2 – Health care infrastructure

5.3 – Sport infrastructure.

Source: IOPRD (2003): *passim*

Table 3.

1. Regional Operational Programmes (16)
2. Operational Programme for Infrastructure and Environment
3. Operational Programme for Human Capital
4. Operational Programme for Innovative Economy
5. Operational Programme for the Development of East of Poland.
6. Operational Programme for Technical Assistance

Source: NCS/NSFR (2006): *passim*