



Forum Bankowo- -Samorządowe

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Reflections on future challenges for Poland 2021-27

European Commission

DG REGIO

November 16, 2018

The way ahead

- *The legislative proposals are with Council and Parliament*
- *The informal dialogue:*
 - **27 February 2019: publication of the Country Report including the Commission position;**
 - **March 2019: launch event to start informal dialogue;**
 - **Request to MSs to establish as soon as possible a roadmap, indicating timing of draft PA and programme submission;**
 - **Conclusion of informal dialogue II`2020;**
 - **Adoption of PA and OPs as soon as the legislative process finishes;**

Main context of challenges:

- *The demographic context:*
 - **fastly ageing society;**
 - **shrinking population (though: less emigration and more immigration);**
- *The economic context:*
 - **persistent high growth fueled by consumption and public investments;**
 - **a strong trend of declining private investments;**
 - **low labour productivity and innovativeness of SMEs;**
 - **Polycentric growth pattern: all territories have profited from high growth;**
- *The social context:*
 - **low unemployment;**
 - **low child poverty;**
 - **low activity rates of women;**
- *The environmental context:*
 - **high energy and carbon intensity;**
 - **high air pollution;**
 - **increasing climate change risks (floods, droughts)**

Territorial challenges

- **All regions increased their welfare! However, differences between regions in terms of GDP per capita have increased over the last six years:**

Mazowieckie, Dolnośląskie and Wielkopolskie, increased their GDP per capita on average by 7.7 %, whereas Podlaskie, Podkarpackie and Lubelskie "only" by 3.7 %

- **A few regions remain the leading forces of the economy:**

Mazowieckie, Dolnośląskie, Śląskie, Pomorskie and Wielkopolskie succeeded in attracting most of new investments, while assuring increasingly more expenditure to innovative and creative sectors.

- **Eastern Poland is converging, but slower than the rest of the country:**

Despite good development and high growth, five regions remain amongst the 20 poorest EU regions. The lack of large and medium enterprises, lower labour productivity and modest innovativeness of firms slow down the catching-up process, coupled with depopulation and emigration of youth and high-level specialists.
Similar characteristics are in Kujawsko-Pomorskie and Zachodnio Pomorskie.

PO1: A smarter Europe by promoting innovative and smart economic transformation

- *Moderate innovativeness of the economy (with 9 regions being modest innovators)*
- *Low expenditure on R&D, with particular challenges in private investments*
- *Challenges linked to business-science collaboration and knowledge transfer, not only of financial nature*
- *Slowly changing perceptions of companies as to advantages of engaging in R&D*
- *Smart specialisations uptake; challenges of cooperation (intra-regional, regional, clusters, international) and governance*
- *Low level of inclusion in research networks and global value chains*

PO1: A smarter Europe by promoting innovative and smart economic transformation

- *Slow productivity growth*
- *Use of services of business environment by firms not sufficient for innovation diffusion*
- *Increased demand for skills driven by technological change; skills needed for in-house innovation by SMEs and for technology transfer*
- *Slow progress of public administration in implementation of e-services*
- *SMEs' reluctance in using digital technologies to transform the business model*
- *Limited access to digitally skilled workforce*

PO2: a greener, low carbon Europe by promoting clean and fair energy transition, green and blue investment, the circular economy, climate adaptation and risk prevention and management

- *High energy intensity of the economy and dependance on coal*
- *Slowing down of the development of renewable energy sources*
- *Air pollution as a major environmental problem and direct threat to human health: main reason still household heating*
- *Most households poorly insulated – not only CO2 emissions, but also energy poverty*
- *Many areas lacking gas distribution*

PO2: a greener, low carbon Europe by promoting clean and fair energy transition, green and blue investment, the circular economy, climate adaptation and risk prevention and management

- *Challenges linked to climate change increasingly costly to the economy: floods (including 'flash floods' in urban areas after heavy rainfall), droughts, heat waves, severe winds*
- *On-going difficulty with proper implementation of the Water Framework Directive*
- *Far from compliance with Urban Waste Water Treatment Directive – risk of fines*
- *Too slow progress in recycling of waste; significant problems with enforcement of waste legislation; untapped potential of circular economy*
- *Rich biodiversity but not enough action and investment to preserve it*

PO3: a more connected Europe by enhancing mobility and regional ICT connectivity

- *Road transport*
 - *Connectivity gaps in northern and eastern Poland*
- *Rail transport*
 - *Low share of rail transport in freight*
 - *Delays in the project implementation*
 - *Limited capacities of the rail infrastructure manager*
- *Regional public transport*
 - *Poor accessibility of rural areas by public transport*

PO3: a more connected Europe by enhancing mobility and regional ICT connectivity

- *Urban mobility*
 - *Lack of transport integration within functional urban areas*
 - *Poor connectivity of city centres with their commuting zones*
 - *High level of congestion and transport emissions*
 - *No integration with spatial planning and other policy activities*
- *ICT*
 - *Growing needs for faster internet*
 - *Low ultra-fast (above 100 Mbps) broadband connectivity outside big cities*

PO4: A more social Europe - implementing the European Pillar of Social Rights

- *Labour market*

- *Lower activity rates for women, older workers, people with disabilities and low skilled*
- *Shortage of adequately skilled labour*

- *Education*

- *Gaps in early childhood education and care infrastructure and services*
- *Low level of inclusiveness of classroom teaching for pupils with disabilities*
- *Not effective work-based learning system for VET students*
- *Overall low quality of higher education and research output*
- *Low adults' participation in learning*

PO4: A more social Europe - implementing the European Pillar of Social Rights

- *Social inclusion*

- *Lack of comprehensive and effective approach to active inclusion of vulnerable people supported by integrated delivery of social services*
- *Underdeveloped system of community based services and institutionalisation of care for persons with disabilities, children deprived of parental care and elderly*

- *Health*

- *Health system still overly hospital based, primary care and outpatient care underdeveloped*
- *Insufficient preventive and diagnosis measures and quality of care*
- *Medical professionals shortages*
- *Provision of long-term care fragmented, provided mainly informally by family members*
- *Maps of healthcare needs are not yet an effective tool for investment decisions*

PO5: a Europe closer to citizens by fostering the sustainable and integrated development of urban, rural and coastal areas and local initiatives

- **Disparities become more apparent at a sub-regional level, with a strong urban-rural divide:**
 - *Five regions - Lubelskie, Podlaskie, Warmińsko-Mazurskie, Mazowieckie and Zachodniopomorskie concentrate two thirds of marginalised communes. Socio-economic problems also affect parts of Kujawsko-Pomorskie;*
 - *Metropolitan areas provide one fourth of jobs, yet generate nearly half of national GDP growth;*
 - *Second- and third-tier cities fail to assume their functional roles. Former capitals of voivodships and post-industrial cities i.e. coal-mining areas are mostly affected with high structural unemployment and declining human capital (early school leavers, lower childcare enrolment);*
 - *Quality of life in towns is decreasing: huge revitalisation needs, urban sprawl, air pollution, public transport;*
 - *Rural areas located away from metropolitan cities, and those with a large percentage of unproductive agricultural holdings are lagging behind. Acute poverty and progressive ageing persist.*

PO5: a Europe closer to citizens by fostering the sustainable and integrated development of urban, rural and coastal areas and local initiatives

- *Metropolitan cities need to continue in their role as drivers of growth and innovation.*
- *Lack of capacity and coordination for public services such as transport, schooling and healthcare in urban functional areas for metropolitan areas and for smaller and medium sized towns.*
- *Many territories undergoing industrial and demographic transition.*
- *Need for community building and strengthening the civil society*

Success factors

- *Simplification*
 - **Reduction of administrative burden for beneficiaries;**
 - **Establishing meaningful demarcations between national and regional OPs.**
 - **Railway investments under one OP (efficiency);**
 - **Reducing administrative burden for healthcare investments;**
- *Enabling conditions*
 - **Early start of implementation only when established, best before OPs are adopted;**
- *Role of regions*
 - **Regions and their self-governments play an essential role in maintaining the polycentric growth pattern with own capacities for investments;**
 - **Essential role in territorial development because of subsidiarity vis-a-vis communes.**

Thank you for your attention