

THE FUTURE OF INDUSTRIALISED CITIES AND REGIONS UNDERGOING STRUCTURAL CHANGES

POLAND

**Country Report
draft**

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1.	Situation of Old Industrialised Cities and Regions in Poland	1
1.1.	Industrial Development: Historical Background	1
1.1.1.	History until 1918	1
1.1.2.	Inter-War Period.....	2
1.1.3.	Socialist Industrialisation.....	2
1.2.	Present Development	4
1.2.1.	Industrial Regions	4
1.2.2.	Transformation Period.....	6
1.3.	Future Development	11
2.	Specific Problems of Polish Cities and Regions with Long Industrial Tradition	12
2.1.	Economic Problems	13
2.2.	Institutional Problems.....	13
2.3.	Social Problems	13
2.4.	Environmental or Ecological Problems	14
3.	Reasons for the Decline of Cities and Regions with Long Tradition ("Old Regions")	14
3.1.	General Reasons	14
3.2.	"Post-Communist" Aspects	14
3.3.	Branch Problems	14
3.4.	National Problems.....	14
4.	Development Strategies.....	15
4.1.	Objectives	15
4.2.	Strategies and Conceptions.....	15
	REFERENCES.....	18

1. Situation of Old Industrialised Cities and Regions in Poland

1.1. Industrial Development: Historical Background

1.1.1. History until 1918

When writing about the origins of industrial activities and the beginning of the capitalist system in Poland, one should remember about the specific, political situation of Poland in that period. At the time when industrialisation was taking place in the European countries (at the end of the 18th and the beginning of the 20th centuries), Poland did not exist as a separate and independent state. Its territory was located within the borders of three invading states, Russia, Germany and Austria, and, therefore, the process of industrialisation developed in different ways and with different speed.

In the middle of the 19th century, basic social and economic reforms were introduced on the Polish territories which were occupied by invaders to liquidate those remains of feudal system which impeded the process of industrialisation. The reforms included the following undertakings:

- appropriation of land to peasants (cheap labour force and extended domestic sale markets),
- technological revolution, i.e. shifting industries from the workshop stage of production to the stage of mechanised factory production (new technologies, new sources of energy and new raw materials),
- development of a railway network (reduction of transportation costs, new supply and sales markets).

Relatively favourable conditions for the development of industry existed within the borders of the German state, because the second half of the 19th century and the beginning of the 20th century were the periods of great successes in the German foreign policy and a rapid growth of the state-owned economy. Thus, the Polish territories which had been annexed by Germany had large and diverse deposits of raw materials.

In the years of 1861-1913, the industrial employment index raised from 23 to 64 persons per 1,000 inhabitants (Misztal St., 1970).

Much less industrialised were the territories annexed by Russia where raw-material deposits were smaller and much more homogeneous. The main factors of industrialisation were the following: growing domestic sales market, extremely absorbent sales market of the Russian empire and the strict customs duty policy of the Tsar's government, protecting not only the Russian, but also the Polish industry against the competitive Western products. Despite that, before World War I, the industrial employment index reached only 30 persons per 1,000 inhabitants (Misztal St., 1970).

The slowest pace of the industrialisation process was recorded on the territories annexed by Austria. One of the most essential obstacles was a strong competition of highly-developed Austrian and Czech industries which were supported by the Austro-Hungarian monarchy. The Polish territories in the Austrian sector were among the least industrialised ones in the Empire. Before World War I, the industrial employment index was 21 persons per 1,000 inhabitants.

One should also emphasise that the rate of industrial development on the Polish territories annexed by the occupying powers was, in each case, much slower than that in the remaining provinces of the respective countries.

The structure of industry on the present-day territory of Poland before World War I was marked by the domination of consumer-goods branches (61.2% of the total industrial employment rate), including food industry (34.8% of the total industrial employment rate) and textile industry (21% of the total industrial employment rate).

The domination of consumer-goods industries is a characteristic feature of regions in their initial phase of industrialisation.

Following the development of capitalist industry, the importance of the branches providing the means of production increased, especially in power generation and metal production industries, as well as chemical and mineral ones (50.6% of the total industrial employment rate in the period of 1907-1910; Misztal St., 1970).

Together with the process of capitalist industrialisation, the process of accelerated urbanisation was taking place on the Polish territories, as expressed in the proportion of urban population in comparison to total population. In 1860-1910, the urban population on the territory of present-day Poland increased from 2,750,000 to 7,963,000 thousand, i.e. almost three times (Misztal St., 1970).

1.1.2. Inter-War Period

After World War I, the western and part of the northern territories of contemporary Poland remained within the borders of Germany. Those territories, the so-called Western Lands, were in a better economical condition, since industry did not suffer war losses there. On the remaining territories, the factors which impeded industrial development were the following:

- war damages suffered by industries, especially on the territories annexed by Russia and Austria;
- loss of existing supply and sales markets, especially the Russian one;
- shortage of own capital;
- lack of economic and political stability after independence was regained;
- war with the Soviet Union.

Generally speaking, the inter-war years were a period of very weak development of industry, subjected additionally to frequent fluctuations depending on the condition of the overall economic situation and restrained by the global economic crisis of 1929.

The existing industry was characterised by a domination of raw-material branches and outdated light industries (textile and food industries). Especially delayed in their growth were those branches which were crucial for transforming the national economy structure, i.e. metallurgy, electrical, machine and chemical industries.

At the beginning of 1939, at the today's territory of Poland, there were 200 centres concentrating more than 1,000 industry workers each, which grouped 75% of the whole industrial employment. The seven largest industrial centres with over 30 thousand workers each concentrated 29% of whole employment. Industrial centres were grouped mainly on the territory of better industrialised regions, presently in south-west and central Poland, while in the poorly industrialised regions located east of the Vistula, only a dozen or so significant centres developed, none of which reached the level of 10,000 employees, respectively. Those centres grew up predominantly in the 1930s under the implementation scheme of the Central Industrial Region (COP). Establishment of that new region began in 1936 following the government's initiatives conducted mainly in non-industrialised areas situated in the fork of the Vistula and the San rivers where, for strategic reasons, several defence companies were completed. The government also financed the development of defence, machine and motor industries in the traditional, old industrial centres, mainly in the Staropolski Region, Upper Silesia and Warsaw.

The industrialisation index at the whole area of the present-day Poland amounted to 50 persons per 1,000 inhabitants in 1939, and, at the same time, as much as 60% of the population made their living in agriculture, with the surplus of 6 million people who could have been employed in the industry.

Despite the slow pace of the increase of the industrial employment rate, the disproportion concerning industrialisation levels between various regions of the country were considerably decreased due to state intervention policy.

At the same time, the process of urbanisation was taking place much faster than in the previous period, as manifested by a 27% share of urban population in the overall population.

1.1.3. Socialist Industrialisation

The years which followed World War II constituted a new stage in the process of industrialisation in Poland, differing essentially from capitalist industrialisation. Those differences resulted, first of all, from the change of the state's social and economic systems, and, especially, from the fact of nationalisation of the basic means of production (Nationalisation Law of 1946 concerned those industrial enterprises which employed more than 50 workers per shift).

World War II brought about much more destruction than World War I and affected the whole country. The modern industries of Warsaw, the Western Lands and other centres of electrical, machine and

chemical industries suffered huge losses; the lowest losses were suffered by textile, raw-material and coal industries.

The development of industry in the People's Republic of Poland can be divided into several specific periods:

- 1944-1946: a period of rescue and commissioning, as well as preliminary reconstruction of industry, introducing obligatory state management in vital enterprises, with introduction of the Nationalisation Law.
- The subsequent years, starting from 1947 until 1975, were the period of accomplishing long-term economic plans in the People's Republic of Poland, namely:
 - 1947-1949: the Three-Year Plan of economic reconstruction and partial extension of the existing enterprises, mainly the fuel and power industries (coal mines and power plants), metallurgy and motor industry;
 - 1950-1956: the Six-Year Plan assuming accelerated industrialisation, with priority granted to the heavy industry, equal distribution of industry and developing non-industrialised areas. Special emphasis was put on the increase of production output of machines and equipment, electricity and raw-material extraction.

Despite achieving the fastest industrial production increase rate (from 17.5% to 27.7% per annum) in 1950-1953, the Plan was not fulfilled, since some of its assumptions turned out to be unrealistic, construction costs at non-industrialised areas were much higher than projected, while the effects were lower than expected.

- 1956-1960: the Five-Year Plan when the progress of capital investment projects was slowed down (due to domestic political tensions) and resources were transferred to the development of those branches which remained underdeveloped. The slogan of equal distribution of industry ceased to be disseminated, though a certain shift of investment projects from the southern macro-region to the central and peripheral ones was obtained. That was the stage of completing the projects originally covered by the Six-Year Plan.
- 1961-1965: another Five-Year Plan, and the increase of capital investment expenditures in industry, especially the fuel and power generation industries (the construction of refining and petrochemical complex in Płock, linked to the Przyjaźń ("Friendship") oil pipeline, and in the development of fertiliser industry (production output was increased 4.5 times).
- 1966-1970: continuation of the accelerated growth of heavy industry, but obtained by application of different means (better effectiveness, increase of labour efficiency, export specialisation, progress in technology and industry modernisation). That was the stage of developing those branches which were the carriers of technological progress. It was in that period that the shipbuilding industry and building machine industry were developed on a large scale, and Poland became the world-famous manufacturer and exporter of certain "turn-key" plants, e.g. sugar, cement, or sulphur acid plants. Although, at that period, industry provided half of the domestic product, the strenuous pace of investment and industrialisation affected adversely the dynamics of average remuneration increase and of consumption. Also, the balance between consumer goods' supply and population's income was disturbed.
- 1971-1975: acceleration of the economic development and industrialisation processes. A characteristic feature of that period was establishing broad international co-operation with both communist countries and capitalist companies. Poland was granted significant loans for the development and modernisation of various industries. Closer integration with the world economy resulted in the growth of export industries, so that was a stage of the selective industrial development. In addition, the structure of investment expenditures was changed since the share of the fuel, power generation and chemical industries was decreased while the share of electrical, machine building, steel and food industries was increased.
- At the end of the 70s, Poland was a quite strongly industrialised country and, while not belonging to the world top group, its industrial production rate was a little higher than the average world one.
- However, starting from 1976, one could observe the symptoms of an imminent economic crisis. It was related to the accomplishment of large projects, mainly the construction of the "Katowice" Steel Mill and wide-gauge "Steel and Sulphur" railway line from the Soviet border to the Upper-Silesia Industrial Region (GOP).

- The 1980s were the years of advancing economic recession and decrease of the production potential of the majority of Polish industrial centres and regions. Despite limited attempts at reform, made under the command economy conditions, a lack of market mechanisms and an opening towards the world economy resulted in systematic increase of distance separating Poland not only from the market-economy countries, but also (in respect of numerous indices) from several of the countries belonging to the former communist block.
- The unchanged basic economic mechanisms, followed by the tense political situation of the 80s, brought the Polish economy to crisis in 1989.

1.2. Present Development

1.2.1. Industrial Regions

Three general development stages can be distinguished in the whole process of Poland's industrialisation:

- systematic growth of the importance of the means of production industry, with decreasing importance of consumer-goods industry,
- a process of technical concentration of the industrial means of production in larger and larger enterprises,
- a process of spatial concentration of enterprises in larger and larger urban and industrial agglomerations.
- The most conspicuous process was that of spatial concentration of industry, manifested by the fast-growing industrial agglomerations (centres and regions), as if in accordance with the rule of "oil stain" spreading. That process resulted in the creation of 24 industrial regions, including 12 of them which had been created before World War II (the so-called old regions), and 12 new ones established after the war (GUS Central Office of Statistics 1994 data: delimitation of industrial regions in 1978-88):
 - 1) Białostocki
 - 2) Bielski
 - 3) Bydgosko-Toruński
 - 4) Częstochowski
 - 5) Gdański
 - 6) Górnośląski
 - 7) Kaliski
 - 8) Karpacki
 - 9) Krakowski
 - 10) Legnicko-Głogowski
 - 11) Lubelski
 - 12) Łódzki
 - 13) Opolski
 - 14) Piotrkowsko-Bełchatowski
 - 15) Płocko-Włocławski
 - 16) Poznański
 - 17) Rzeszowsko-Tarnowski
 - 18) Staropolski
 - 19) Sudecki
 - 20) Szczeciński
 - 21) Tarnobrzeski
 - 22) Warszawski
 - 23) Wrocławski
 - 24) Zielonogórski

From the point of view of their origin, i.e. the factors leading to the creation of an industrial agglomeration, covering several, a dozen or so or several dozens of industrial regions, Stanisław Misztal (1978) differentiated six types of various regions in Poland:

- Regions related to raw materials, existing locally or in direct vicinity: Górnośląski, Częstochowski, Opolski, Staropolski, Karpacki, Piotrkowsko-Belchatowski and Legnicko-Głogowski.
- Regions related to home and workshop manufacture systems existing on their territories long before the appearance of factory industry: Łódzki, Bielski and Białostocki.
- Regions related equally to the existence of raw materials, as well as the strong home and workshop manufacture, developed before the appearance of factory industry: Sudecki and Zielonogórski.
- Regions established mainly in large cities, and, more precisely, those based on urban labour force, sales markets and infrastructure: Warszawski, Wrocławski, Krakowski, Poznański, as well as Bydgosko-Toruński, Lubelski and Ostrowsko-Kaliski.
- Regions established at large transportation nodes and based on maritime economy needs: Gdański and Szczeciński.
- Regions related to their special location: Płocko-Włocławski, Rzeszowsko-Tarnowski and Sandomiersko-Tarnobrzeski; however, in the last case, a significant role was also played by local extraction of deposits (sulphur).

The types of industrial regions as classified above show essential differences in the distribution and numbers of centres on their territories. The regions established mainly in large cities (Type 4) and based on either large transportation nodes (Type 5), or home-and-workshop manufacture existing on their territories long before the appearance of factory industry are distinguished, in general, by the explicit domination of one industrial region which, most often, concentrates 50-90% of the total industrial employment volume of the region. In that way, those are regions with mono-centric structure of industry. In opposition to that, a characteristic feature of regions established mainly (Type 1) or to a large degree (Type 3) based on raw-material extraction is, as a rule, a much higher number of centres, none of which positively dominates over the remaining ones. Such regions are classified as having a poly-centric structure of industry.

The largest accumulation of industrial centres is found on the territory and in the vicinity of the Coal Mining District of Upper Silesia. Five industrial centres which had been formed there as a result of integration processes, i.e. Górnośląski, Bielski, Częstochowski, Krakowski and Opolski, were, in fact, transformed into the single Górnośląsko-Krakowski Industrial Macro-Region which, while covering only 6% of the country's surface area and 19% of the country's population, concentrated ca. 30% of the production output and domestic industry employment (Misztal St., 1996, Atlas RP). In 220 industrial centres in that Macro-Region, 20 large centres employ more than 20,000 people each. In the Górnośląski Industrial Region, the majority of centres are those with the domination of the fuel and power-generation industries and metallurgy, while in the remaining Regions, the centres with the domination of machine and metal industries occur.

The second largest, in respect of its significance, concentration of industry in Poland is the Warszawski Industrial Region, which, in addition to Warsaw, includes 60 smaller centres where industrial employment does not exceed 10,000 people each. In the majority of those centres, there is the domination of machine and metal industries, with a considerable role played by the high-tech industry branches.

The third place, in respect of the number of employees, is occupied by the Łódzki Industrial Region, which, in addition to the city of Łódź, includes more than 30 small- and medium-sized industrial centres, with either domination or a large share of the light industry, mainly the textile one.

The Sudecki Industrial Region includes ca. 130 scattered, small- and medium-sized centres, with a considerable share of technologically outdated industries, such as textile, machine building and metal, as well as mineral industries.

A similar volume of industrial employment is represented by the Staropolski Industrial Region which covers ca. 60 centres, including three larger cities: Radom, Kielce and Ostrowiec Świętokrzyski. In the majority of centres in the regions, it is the machine-building and metal industries which dominate.

The remaining old industrial regions, Szczeciński, Wrocławski and Zielonogórski, and all the new regions constitute smaller accumulations of industrial centres whose number, as a rule, does not exceed 20 each.

In 1980, the number of industrial centres in which the number of those employed in industry exceeded 1,000 workers amounted to 590, while such centres concentrated 92% of all employed in industry.

That situation is illustrated in Table 1 and Maps 1 and 2.

Table 1. NAJWIĘKSZE OŚRODKI PRZEMYSŁOWE W GRANICACH ADMINISTRACYJNYCH MIAST z 1985 r., THE LARGEST INDUSTRIAL CENTRES WITHIN THE CITY ADMINISTRATIVE BORDERS IN 1985

Ośrodki Centres	Zatrudnienie w tys. Osób Employment in thousands of workers				Zmiany zatrudn. w tys. osób Changes of employment in thousands of workers		
	1939	1946	1980	1985	1939-46	1946-80	1980-85
Warszawa	124.2	31.6	269.2	234.4	-92.6	237.6	-34.8
Łódź	119.7	120.8	214.7	170.5	1.1	93.9	-44.2
Kraków	22.0	28.2	139.5	118.5	6.2	111.3	-21.0
Wrocław	66.0	21.8	115.2	100.4	-44.2	93.4	-14.8
Poznań	28.0	36.7	102.6	89.0	8.7	65.9	-13.6
Katowice	31.6	44.2	97.6	88.4	12.6	53.4	-9.2
Gdańsk	22.0	15.4	76.6	71.5	-6.6	64.2	-8.1
Bydgoszcz	14.4	21.6	78.8	70.6	7.2	57.2	-8.2
Szczecin	42.3	6.0	67.8	59.9	-35.4	60.9	-7.9
Gliwice	19.0	14.4	66.0	58.6	-4.6	51.6	-7.4
Bytom	35.2	37.7	65.0	56.9	2.5	27.3	-8.1
Bielsko-Biała	22.0	21.6	69.1	56.2	-0.4	47.5	-12.9
Częstochowa	23.5	19.9	62.6	54.0	-3.6	42.7	-8.6
Radom	11.0	7.7	53.3	52.0	-3.3	45.6	-1.3
Sosnowiec	21.2	26.3	59.8	50.6	5.1	33.5	-9.2
Zabrze	35.8	30.8	49.6	50.5	-5.0	18.8	0.9
Dąbrowa Górnicza	12.1	14.7	51.3	45.2	2.6	36.6	-6.1
Lublin	7.1	7.3	47.8	45.2	0.2	40.5	-2.6
Jastrzębie-Zdrój	-	-	42.8	44.5	-	42.8	1.7
Tychy	2.6	3.6	41.1	42.9	1.0	37.8	1.5
Ruda Śląska	17.3	21.9	44.8	41.3	4.6	22.9	-3.5
Białystok	6.2	3.2	43.0	39.3	-3.0	39.8	-3.7
Gdynia	4.2	5.7	42.4	38.0	-1.5	36.7	-4.4
Toruń	3.7	3.8	41.2	37.4	0.1	37.4	-3.8
Rzeszów	3.5	2.5	33.7	34.5	-1.0	31.2	0.8
Kielce	5.5	4.0	37.7	34.2	-1.5	33.7	-3.5
Rybnik	12.3	13.7	34.3	33.1	1.4	20.6	-1.2
Tarnów	6.0	5.2	37.1	32.9	-0.8	31.9	-4.2
Chorzów	19.4	31.7	38.5	31.7	12.3	6.8	-6.8
Wałbrzych	25.2	27.8	30.4	30.4	2.6	6.3	-3.7
Wodzisław Śląski	4.3	9.1	29.8	29.8	4.8	21.2	-0.5
Kalisz	4.1	6.2	27.5	27.5	2.1	24.9	-3.6

Source: Atlas Rzeczypospolitej Polskiej, 1996.

It should be noted, however, that the regional arrangement follows the Voivodeship distribution prior to 31 December 1998.

1.2.2. Transformation Period

Economy

The collapse of the communist system in the Eastern European block countries in 1989 originated the period of economy transformations, which has been lasting for over 10 years.

When commencing its economy transformation, Poland was in the worst position as compared with the remaining countries of the former communist block. Throughout the whole decade of the 1980s, the gross national product per capita was lower than that obtained in 1978.

The whole period of the ongoing transformation has included three stages (Stryjakiewicz T., 1999):

1. 1990-1991: initial transformation stage, or the "shock economy" or a "system breakthrough" stage – a continued recession period.
2. 1992-1993: the stage of overcoming recession and initiating the economic growth.
3. Since 1994: the growing stage of macro-economic stability and quick industrial growth.

In 1990, the institutional grounds for passing from a highly-centralised economy to market economy were established by the State-Enterprise Privatisation Act of 13 July 1990.

The changes in the volume and structure of industrial production were affected mostly by the following stabilisation activities:

- releasing prices from under administrative control and subjecting them to market rules, owing to which, the price increase index amounted to 1,154 in 1989-91,
- introduction of restrictive remuneration and income policies; consequently, the real wages decreased by ca. 25% in 1990-91,
- introduction of internal convertibility of the Polish zloty, liquidation of state-controlled foreign trade and removing import barriers, which created external competition conditions for domestic companies, most often not being ready to meet them,
- considerable reduction of subsidies which, in certain branches under the command economy, exceeded the value of products manufactured by them.

As we have already mentioned, the first two years of transformation were the period of continued recession. Industrial production was affected by low domestic demand and high competition from imported products.

A fast drop of the production increase rate (by 24.2% in 1990 in comparison to that of 1989, and to the level of 11.9% in 1991) resulted in the decrease of Gross National Product (GNP) by 11.6% in w 1990 and by an additional 9% in 1991 (Zgliński W., Atlas RP, 1996).

That situation was affected to a considerable degree by the decomposition of markets of the former Council for Mutual Economic Aid (COMECON), the dissolution of the Warsaw Pact and the related quick demilitarisation of Poland's economy. At the beginning of the transformation period, there were 80 defence industry enterprises, with ca. 200,000 people employed, while in 1994, only 31 companies remained, with 80,000 workers (Stryjakiewicz T., 1999).

Regional adaptation to that stage of development went in two directions:

- the decrease of the industrial employment rate was accompanied by a relative increase of service-sector employment rate (in all the regions of western and northern Poland and the majority of regions in central Poland);
- the decrease of industrial employment rate was accompanied by the increase of farming employment rate (in some regions of the so-called "Eastern Wall" and central Poland).

Starting from 1992, recession tendencies were stopped. The value of production sold, as compared to preceding years, was increasing by 3.9% in 1992, 6.4% in 1994 and 9.4% in 1995, while GNP exceeded the level of 1989 in 1995.

Table 2. DYNAMIKA PRODUKCJI GLOBALNEJ I PRODUKTU KRAJOWEGO BRUTTO W LATACH 1992-98, INCREASE OF GROSS OUTPUT AND GROSS DOMESTIC PRODUCT IN 1992-98

Wskaźnik Index	1992	1993	1994	1995	1996	1997	1998		
	rok poprzedni = 100 previous year = 100							1990 = 100	
Produkcja globalna Gross Output	140.7	138.4	132.3	138.7	125.5	122.4	115.8	877.8	
Produkt krajowy brutto Gross Domestic Product	142.1	135.5	135.1	136.8	125.8	121.8	117.1	921.9	

Source: Statistical Yearbook of Poland, GUS 1999

As far as the branch structure is concerned, the beginning (1989-93) of the transformation period was characterised by a nearly 10% growth of output (as compared to 1989) in the fuel and power generation industries owing to the following:

- major increase of prices of power generation materials, which increased the index of output sold,
- protective policy of the state in relation to that industry (e.g. open and hidden subsidies, export subsidies).

In that period, also the roles of food processing, wood and paper, and mineral industries were increased, while those of metallurgy, electro-machine and light industries were decreased.

During the second stage of transformation, those trends were stopped, and, in several cases, turned around; however, the dropping trend displayed by the light industry did not reverse.

After the initial decrease period, the role of electro-machine industry started to grow again, and the increase trends continued in wood and paper, as well as food processing industries.

Those trends were also reflected in the structure of employment.

Employment

Transformation of the state-owned economy brought about essential changes in the volume and structure of employment. Within a relatively short period of time, the labour market in Poland changed from a market characterised by a shortage of labour force (especially in the industrial regions) to a market with poor labour demand. There was a great decrease of the number of employees in domestic businesses (especially in non-agricultural ones) from 17.4 million in 1989 to 14.9 million in 1994.

That decrease was especially large in the northern Regions (voivodeships) where the liquidation of State-Owned Farms contributed to the rise of unemployment and the existence of related problems.

Table 3. BEZROBOTNI ZAREJESTROWANI, LATA 1990-2000 (stan w końcu okresu), REGISTERED UNEMPLOYED, 1990-2000 (as at the end of the period)

Lata Years	Ogółem Total	Stopa bezrobocia rejestrowanego
	w tys. in thousands	Registered unemployment rate in %
1990	1,126.1	6.1
1992	2,509.3	13.6
1995	2,628.8	14.9
1997	1,826.4	10.3
1998	1,831.4	10.4
2000 (31/08)	2,477.6	13.7

Source: Statistical Yearbook of Poland

Considerable changes also occurred in the industrial structure. The largest decrease of employment was found in coal mining, machine and metal, as well as light industries, while the growing tendency was displayed only in the food-processing and wood and paper industries (see graphs).

As a result of the transformation which had taken place so far, the private sector obtained a dominating share in the overall number of employees in the majority of voivodeships. The least advanced in the privatisation processes was the Katowickie voivodeship (Katowicki Industrial Region) in which as much as 58% of the total number of employees worked in the public sector, as well as Wałbrzyskie, Legnickie and Jeleniogórskie voivodeships (Sudecki Industrial Region).

A considerably large increase of employment was found in the north-western part of the country, and in the Warszawskie, Łódzkie, Gdańskie and Elbląskie voivodeships.

Privatisation

In 1990, the public sector provided 69.1% of gross domestic product, including 81.8% of the value-added output in the industry, while at the same time, in highly-developed countries, state enterprises provided ca. 9% of average of the value-added output.

The process of private-sector development in Poland has been effected through the expansion of the existing business entities and establishment of new ones, as well as privatisation of state-owned enterprises.

In the period of 1991-1995, the number of industrial enterprises covered by the privatisation scheme grew from 221 at the end of June 1991 to 1,821 at the end of 1995, i.e. by more than eight times, which constituted 35.0% of state-owned enterprises included in ownership transformation processes. In general, the number of enterprises covered by the privatisation processes amounted to 6,159 in 1990-98.

As a result of ownership transformations and liquidation processes, the total number of state-owned enterprises decreased by 32% in the period of 1989-94, from ca. 7,300 to merely 5,000. The highest share in the nation-wide number of state-owned enterprises was maintained by the traditionally highly-industrialised voivodeships: Katowickie (9.5%), Warszawskie (7.7%), Poznańskie (6%), Gdańskie and Wrocławskie (5.8% each), while the lowest share was in the voivodeships of the south-eastern and central parts of Poland.

Capital Investments

After a period of reducing capital investment activities in state-owned economy during the first years of transformation, gradual growth of investment-related activities was noted in industry since 1992 and 1993. The indices of capital-investment expenditures, including those in industry, are shown in Table 4.

Capital-investment expenditures in the period of 1992-98 (in fixed prices) was maintained at the same level. Given the high inflation rate, we can say about a real and drastic drop of capital expenditures in mining and extraction industries.

An important factor to stimulate the economic growth, modernise the industry structure, improve product competitiveness and increase export volume are foreign investment activities.

By the end of the first quarter of 1996, foreigners invested in Poland 7,886.6 million US dollars (in direct investments). That figure includes only 3,777 companies which invested at least a million each. In fact, the total value of foreign investments exceeded considerably 8 billion dollars, which gave Poland the second position in Central and Eastern Europe (the first position was occupied by Hungary). Those investments accumulated mainly in large cities and urban agglomerations, with a visible domination of the Warsaw area. However, a gradual spatial de-concentration trend in the distribution of foreign capital was observed. Some large individual projects were located in smaller centres and towns, such as Kwidzyń, Olsztyn or Dębica. The object of investors' interest were also small towns displaying great initiatives of their local governments (such as Brzesko, Niepołomice, or Wolbrom).

The spatial structure of the whole structural transformation in Poland's economy is characterised by a strong regional differentiation. The development of new private companies, as well as the flow of foreign capital, are most intensive in large cities and at the outskirts of main urban agglomerations. Also, in the Region of Wielkopolska, the diversity of economic structure, plentiful infrastructure and efficient

agriculture facilitated the adjustment of the Region's economy to market economy conditions. Special attention should be devoted to western voivodeships which, using their location close to the national border, stand out in respect of the scope of structural changes. However, the transformation of economy is delayed and causes some negative social phenomena on those areas which used to occupy good economic positions: in the mining and metallurgy zone of Upper Silesia, in the Industrial Region of Łódź and part of the Sudecki Industrial Region, as well as in the regions which used to be dominated by state-owned farms.

Table 4. DYNAMIKA NAKŁADÓW INWESTYCYJNYCH (ceny stałe), INCREASE OF CAPITAL-INVESTMENT EXPENDITURES (fixed prices)

Wyszczególnienie Specification	1992	1993	1994	1995	1996	1997	1998		
	rok poprzedni = 100 previous year = 100						1990 = 100	1995 = 100	
Ogółem Total	100.4	102.3	108.1	117.1	119.2	122.2	115.3	209.4	168.0
Przemysł Industry	98.3	100.7	120.7	115.0	120.0	113.8	111.2	202.6	151.9
Górnictwo i kopalnictwo Mining/Extraction	103.5	87.8	115.8	102.7	96.0	100.2	103.1	125.9	99.2
Działalność produkcyjna Manufacturing	88.9	99.7	132.7	116.2	127.5	119.8	117.9	207.2	180.0
Zaopatrzenie w energię elektryczną, gaz i wodę Electricity, gas and water supplies	116.1	106.6	103.7	116.3	112.0	103.9	95.9	218.7	111.6

Source: *Statistical Yearbook of Poland, GUS 1999*

Index Evaluation

Conducting a comparative analysis of the processes occurring during the transformation period by means of indices is quite difficult due to the changes in terminology, methods of statistical reporting, source materials and a short analysis period. The data base concerning industry is extremely poor, and particular problems result from the change of business-activity classification in 1993, i.e. the replacement of GUS State Economy Classification (KGN) by the European Business Classification (EKD) in which the concept of "industry" does not exist at all and has been substituted by three sections:

- mining and extraction,
- manufacturing,
- electricity, gas and water supply.

Those issues are illustrated in Table 5.

Table 5. DYNAMIKA ZATRUDNIENIA, PRODUKCJI SPRZEDANEJ I NAKŁADÓW INWESTYCYJNYCH W PRZEMYSŁE W LATACH 1980-97, INCREASE OF EMPLOYMENT, PRODUCTION SOLD AND CAPITAL EXPENDITURES IN INDUSTRY IN 1980-97

Wskaźnik Index		Gospodarka nakazowo- rozdzielcza Command Economy		Transformacja systemowa System Transformation							
		1980	1985	1990	1991	1992	1993	1994	1995	1996	1997
Employed in industry	KGn: in thousands	5 245	4 877	4 620	4 250	3 882	3 629	-	-	-	-
	1980 = 100	100.0	93.0	88.0	81.0	74.0	69.2	-	-	-	-
	EKD: in thousands	-	-	-	-	3 784	3 671	3 641	3 757	3 730	3 740
	1992 = 100	-	-	-	-	100.0	97.0	96.2	99.3	98.6	98.8
	% of total empl.	30.3	28.4	28.4	27.7	25.8	25.6	25.2	25.5	24.8	24.2
Prod. sold (in fixed prices)	KGn: 1980 = 100	100.0	100.3	86.0	75.7	78.7	84.4	-	-	-	-
	EKD: 1990 = 100	-	-	100.0	92.0	94.6	100.7	112.8	123.7	134.0	149.4
Capital expen- ditures (in fixed prices)	KGn: 1980 = 100	100.0	84.1	99.3	92.2	87.8	89.8	-	-	-	-
	EKD: 1990 = 100	-	-	100.0	97.1	95.4	96.1	116.0	133.4	160.1	182.2
-Data not available											

Source: Stryjakiewicz T.: *Adaptacja przestrzenna przemysłu w Polsce w warunkach transformacji*, Wydawnictwo Naukowe UAM, Poznań 1999.

The new administrative division of Poland, as provided for in the Act Concerning the Territorial Division of Poland of 24 July 1998, which reduced the number of voivodeships to 16, does not facilitate conducting analytical research or providing satisfactory conclusions, either.

All the above-mentioned factors cause that "the image of changes of branch and type structures in the Polish industry in the period of transformation is obscure and does not allow us to draw far-reaching conclusions." (Stryjakiewicz T., 1999).

1.3. Future Development

When analysing changes which took place in the Polish industry during the last ten years of transformation, one can conclude as follows (Stryjakiewicz T., *Adaptacja przestrzenna...*, 1999):

- The structural changes in the Polish industry confirm the trend appearing in the world economy where the economies of scale lose their importance in favour of the economies of scope, which is manifested, among others, by the development of small- and medium-sized businesses.
- The processes of adapting large public-sector enterprises, facing their competitors from highly-developed countries, take place very slowly, especially in mining and heavy industry.
- The process of globalisation of the Polish industry (i.e. the flow of capital, technology and know-how) has had so far distinctly unidirectional nature and consists in, first of all, taking over by multinational companies the control of such industrial branches as automobile, electronics and electrical engineering industries, food, tobacco, wood and paper processing, chemical industry (especially cosmetics and cleaning supplies), and, in addition, in investments in the financial services' sector. However, international companies are not involved in those branches which require the most complex restructuring or largest capital investments.
- The foreign capital, despite numerous investment incentives, avoids the regions which have particularly been struck by the transformation crisis. A positive effect of globalisation is the arrival of new forms of management and marketing.
- In the regional approach, despite the following reservations:
 - attempt to monopolise the Polish market by some international corporations,
 - connections between some of those corporations and Polish companies,

- slow pace of linking the plants located on the territory of Poland with global network systems,
- there is a positive impact of foreign investments on the production output increase and favourable changes in adaptability indices.
- The influence of new institutional factors (investment incentives on the territories with extreme unemployment rate, special economic zones, or EU aid programmes) on the location of industry in Poland is relatively small. The preferred locations are those in the largest urban agglomerations. Moreover, the influence of financial decisions (including international ones) on investing in industry is also growing.
 - The regions in which industry adapts best to the new economic system and to the global changes are the Warszawski and Poznański regions. The least adaptation capacity is found in the industries of the Sudecki and Tarnobrzieski regions.
 - The main factors contributing to the adaptation are the following:
 - diversity of industrial structures,
 - the level of infrastructure and institutional environment,
 - social preparedness (entrepreneurial culture).
 - The change of the central-command economy model to a market one accelerated the process of abandoning of old, worn out areas and facilities by industrial businesses. Ownership changes, as well as technological and organisational changes in enterprises also resulted in spatial changes (unnecessary, vast protection zones, more expensive and extensive utilisation of land in downtown areas). These facts have resulted in the existence of the problem of how to handle post-industrial areas and facilities, or change the problem's category from a local issue concerning exclusively mining areas to the nation-wide matter.
 - The problem of post-industrial areas is closely linked with the environment degradation and pollution, and the object of transforming those areas is to shape a new functional and spatial arrangement, a new state of balance between the given area and its surroundings (Gasidło K., 1998). An indispensable condition for conducting the transformation process is a well operating economy (generating demand for land designed for new capital investment projects), a properly developed science and technology, as well as a high level of social awareness and approval.

Looking at the changes which have been taking place, it is difficult to project a further development of both industry and industrial regions. One can attempt at stating that, in the 1990s, the grounds for industrial market transformation were established in Poland, and the economy stakeholders have been adapting to competitive conditions, as proved by the growth of industrial output, which, since 1992, has been faster than in other countries of Central and Eastern Europe (Strykiewicz T., 1999). So far, that growth has been based on the utilisation of simple reserves, but maintaining that growth will require preparation of a long-term strategy, defining the roles of both companies and regions in industrial transformations and creation of a new spatial arrangement (with decreasing significance of traditional industrial regions based on raw materials and cheap labour force). The direction of those transformations is also related to the issue of Poland's membership in the European Union, as well as the continued institutional and legal development of the economic system in Poland.

2. Specific Problems of Polish Cities and Regions with Long Industrial Tradition

One of the most essential reasons of the existence of problems related to the transformation process in Poland is the step nature of its course. Poland, in opposition to highly-industrialised countries which have already come through the stages of developing services, transportation and environmental improvement, and, in 1989, were at the stage of computerisation, was still in that breakthrough year at the stage of industrialisation. In order to catch up with the EU countries, Poland has to come through all those developmental stages at a time.

2.1. Economic Problems

Due to the burden of the past heritage, the process of adapting industry and the whole economy to the new rules takes place slower and is more complicated than ever projected, because of the following factors:

- limited resources (financial ones, in particular) which restrict quick revival of capital- and technology-consuming industries, and providing them with international competitiveness,
- endangering the real advantage of Polish industry (cheap labour force) by other countries,
- loss of markets resulting from the dissolution of COMECON and the collapse of the Soviet Union,
- polarisation of the territory of Poland into regions being economically stronger and weaker, or more industrialised western regions and less industrialised eastern lands.

The regions with internally diversified structures of their economies proved to be more liable to transformation, in opposition to the regions with mono-cultural economies or economies dominated by their traditional branches. That is why, at the background of the whole country, the regions which are the most advanced in the transformation process are easily distinguishable. Those regions are related to some of the urban agglomerations (Warsaw, Poznań, Kraków, Wrocław, Bielsko-Biała, Gdańsk and Szczecin). They have considerably abundant economic structures, with populations best prepared to face free market, relatively low unemployment rates and high shares of the private sector, the best-developed business environment and the largest flow in of foreign capital.

The formerly privileged regions, with mining and processing centres, or the so-called old industrial regions, dominated by the traditional industry and raw-material branches, are losing their top positions. The same concerns the areas and cities whose existence was based on large defence plants, such as the Górnśląski, Sudecki (former Wałbrzyskie and Jeleniogórskie voivodeships) and the Tarnobrzanski Regions.

The areas belated in their development, located in north-western Poland, are endangered by the strengthening of their belatedness syndrome. It is due to the fact that the slowest development of the private sector takes place there, followed by small interest on the part of the foreign capital which, given the lack of local private capital, an insufficient infrastructure and business environment institutions, constitutes a threat that the civilisation belatedness of those areas will be extended.

2.2. Institutional Problems

Such problems include, first of all, the following:

- unstable legislation and legal loopholes resulting in waiting, uncertainty and temporary attitudes of business entities, or discouragement of potential investors, contributing to corruption and the expansion of the "grey zone" economy,
- incorrect privatisation processes, characterised by selling the best operating enterprises at the prices being disproportional in relation to their actual value,
- lack of proper market mechanisms, underestimation of innovation and expenditures for research and development,
- poor market macro-policy of the government.

2.3. Social Problems

- Frequent changes of governments and their strife for obtaining temporary political goals resulting in replacement of personnel at all the levels, contributing to the incompetence of state officers and growth of bureaucracy.
- Increased unemployment resulting in internal and external migration and the increase of crime rate, which require considerable resources to be allocated towards education and training programmes.
- The extension of the gap between the income of the poorest and that of the richest, which leads to the pauperisation of the majority of population and strikes.

2.4. Environmental or Ecological Problems

- Intensive and long-lasting industrialisation of the country, resulting in intensive pollution of the natural environment (water, air and soil), industrial regions and cities, as well as the transformation processes themselves have yielded ca. 6,000 km² (1996) of waste land, devastated or degraded to the degree calling for land reclamation. An additional problem is posed by the developed post-industrial areas, abandoned production facilities located in city centres, or left idle after the liquidation and modernisation of industrial plants.
- All of those factors create a "bad image" of a given region but, at the same time, they are aspects which facilitate restructuring and rehabilitation of the post-industrial areas (due to the fact that former industrial areas enjoy attractive location in present-day city centres).

3. Reasons for the Decline of Cities and Regions with Long Tradition ("Old Regions")

3.1. General Reasons

- Reduction of coal mining and metal production.
- Change of the economy model from centrally controlled to free-market one.
- Outdated technologies producing poor quality products.
- Industrial concentration in old regions.
- Competition from international corporations.
- Loss of eastern markets.

3.2. "Post-Communist" Aspects

- Preference of energy- and material-consuming heavy industry.
- Reduction of consumer-goods industries and services.
- Absolute domination of the so-called state-owned sector.
- Domination of large enterprises, including industrial complexes, and decline of small- and medium-sized businesses.
- Arbitrary methods of making business location decisions based on non-economic criteria.
- State-controlled determination of raw-material supplies and markets for enterprises.
- Low mobility of the means of production, especially of labour, capital and technologies.
- The system of prices and tariffs established by state authorities which resulted in, among others, irrational transportation organisation and excessive use of vehicles.
- Lack of an independent financial sector and other business supporting institutions.
- The country's share in the global distribution of labour and international trade was limited to a high degree to one economic organisation (COMECON).

3.3. Branch Problems

- High degree of production and market monopolisation.
- Subsidising the fuel and power generation industries.

3.4. National Problems

- Deteriorated (unstable) law system.

4. Development Strategies

4.1. Objectives

The basic changes in the programming of the social and economic development in Poland constitute the following:

- the reform of the state administration, which resulted in the creation of the voivodeship as a regional policy entity,
- a new stage of the integration process between Poland and the European Union, and
- the acceptance of the sustainable development concept by Poland (recognized to be an optimum strategy of economic development at the United Nations Conference in Rio de Janeiro in 1992).

Sustainable development should enable the accomplishment of well-defined, socially desirable, economic objectives, both long- and short-term ones.

The long-term objectives include the following:

- quick economic growth, or the increase of gross domestic product per capita,
- system stabilisation, i.e. better balance between supply and demand,
- ecologically sustainable development, or the preservation of biological functions of the natural environment and permanent resources of natural assets.

The short-term objectives include the following:

- provision of new high-quality legal regulations, eliminating the inefficient and ineffective ones, increasing the transparency of public activities and their sensitivity to social problems.

4.2. Strategies and Conceptions

I. The "Conception of Medium-Term Economic Development Until 2002," approved by the Council of Ministers on 15 June 1999, prepared in the Ministry of Economy, in collaboration with scientific circles. This document combined the macro-economic vision of Poland's development with defining tasks and activity directions to accomplish the vision. Specific implementation tools, including financial resources, are defined in the government programmes, both the ones which have been approved, as well as those envisaged in the document.

- The document presents the visions of national economy growth in the years to come. This is a particularly important period in which vital social, economic and systemic reforms will be implemented at the same time. They will be decisive for proper preparation of Poland to its membership in the European Union. The economic policy established by the said document is to provide true compliance with the objectives of the economic and monetary union.
- This document constitutes an element of fulfilment of the pre-accession strategy under the "Partnership for Membership," making it possible to use all forms of the EU assistance provided for applicant countries. The "Conception" is a starting point for the preparation of the National Development Plan until 2006. Having such a plan is the condition for closer cooperation with the European Union in many fields, as well as obtaining access to the Union's Structural Funds and the Convergence Fund in the future.
- The building of a modern economy, as postulated in the "Conception," will be subjected to the strategy of durable and sustainable development, combining economic, social and ecological approaches. The goal of that strategy will be to create good conditions to allow for an increase of the economy's efficiency, with simultaneous ensuring the preservation of cultural heritage and natural environment.

- Increase of innovations will be one of the chief factors contributing to the economic growth since the competitiveness of Polish economy in the years to come will be determined by the ability to transfer quickly the technological, managerial and organisational solutions to businesses, and to convert those solutions into commercial successes.

Those publications utilised, among others, the results of all the works on sectoral and thematic, strategic and prognostic, as well as regional (voivodeship) issues.

II. "The Conception of National Spatial-Development Policy," prepared in 1999, was based on two earlier documents:

- "Initial Conception" published in Report 3 in 1995,
- "Assumptions of the Social and Economic Development Strategy Until 2010" published in Report 4a in 1996.

According to the statutory formula of the "Conception," its subject-matter is the determination of a nation-wide spatial policy. The idea of "spatial policy" is understood as a conscious influence of the country's development in a way dependent on its developmental strategy priorities. This is a result of the fact that the Conception was prepared and has been updated under the scheme of the national development strategy.

The provisions of Art. 56 of the Land Management Act clearly specify a study nature of the Conception which is a spatial planning report, with a strategic significance and not being an obligatory act. The assumption of such a formula seems to be suitable for the functioning capacities and needs of free-market economy in such a dimension.

In this form, the Conception is not a large-area spatial plan, determining the specific location of individual public capital investment projects. It is important, however, to programme the implementation instruments of the Conception. Elaborated programmes, including government tasks, serving the role of attaining non-local public goals, and affecting the physical development of the country have their grounds in the solutions established in the Conception. In this sense, the Conception's role is to bind the authorities which prepare the programmes under discussions. The remaining contents of the Conception are not binding and provide a source of data for other planning entities (Vademecum..., 2000).

The basis for the planning system is the Land Management Act of 7 July 1994 (published in Dz. U. No. 89, Item 415, as later amended). The Act Concerning the Amendment of the Act of 24 July 1998, became effective on 1 January 1999 and determined the competencies of state administration agencies in relation to the systemic reform of the state, essentially affecting the physical planning procedures. According to the changes introduced by the said Act, the physical planning procedure is the following, as of 1 January 1999:

On the national level, the "Conception of the National Spatial Development" is prepared, together with periodic reports on the country's developmental conditions, as well as programmes specifying the government's tasks to fulfil public objectives, prepared by ministers and government agencies.

On the regional level, Voivodeship Assemblies approve the following planning documents:

- "The Strategy of Spatial Development"
- "The Physical Plan of the voivodeship"
- medium-term voivodeships programmes,
- foreign co-operation priorities of the voivodeship.

The above-mentioned voivodeships programmes should comply with the "Conception of the National Spatial Development" and "The Physical Plans" of neighbouring voivodeship.

Neither "The Physical Plan of the Voivodeship," nor any of the other documents specified above are local ordinances, and they do not breach the communes' rights.

At the county (powiat) level, the county authorities may conduct within their substantive jurisdiction, non-obligating analyses and studies in physical development, concerning the county's territory and the issues of its development.

At the commune (gmina) level, two documents are prepared:

- "The Study of Conditions and Directions of Land Management of the Commune"
- "The Local Physical Plan" (for the whole or part of the commune).
- Attached to the Local Physical Plan is the projection of the Plan's impact on the natural environment, prepared by an expert certified by the Ministry of Environmental Protection, Natural Resources and Forestry.

From among all of the documents specified above, only the Local Physical Plan constitutes a local-law regulation (or ordinance).

Essential procedural elements are the negotiations between the voivodeship and communal authorities concerning the ways of including the non-local state tasks in Local Physical Plans.

The system which has been presented above requires modification in the form of either amending the existing Land Management Act or approving a new one. This task is even more urgent in view of the fact that, on 1 January 2001, those Local Physical Plans which have been approved before 1 January 1995 will become invalid

"The Initial National Development Plan" was prepared in 1999 to determine the main directions and priorities of Poland's social and economic cohesion until 2002 to be financed chiefly from the EU aid resources. The document was initially approved by the European Integration Committee on 22 December 1999. The preparation of the Plan was the condition of applying for PHARE Fund resources under the programme of social and economic cohesion. The goal of the programme is to support regional projects aimed at developing the manufacturing sector, infrastructure and human resources in the selected regions and voivodeships. In 1999, the respective programme documents (Operating Programmes and Project Files) were prepared by the Voivodeship Assembly Offices of the Śląskie, Podkarpackie, Lubelskie, Podlaskie and Warmińsko-Mazurskie Voivodeships, in close collaboration with the central-government administration.

At the same time, sectoral policy programmes were also determined.

In 1995, the Ministry of Industry and Trade prepared several industrial-policy programmes encompassing the development of small and medium-sized businesses, including the following:

- "Analysis of the effectiveness of industrial and technical policies, with proposed modifications";
- "International competitiveness of the Polish industry. An industrial policy programme for the period of 1995-97";
- "Elements of the state policy concerning the trading of goods and services, affecting the Polish economy competitiveness, in the light of the European single-market principle";
- "Opportunity areas: identification and procedural conceptions."

In June 1998, following the previous unsuccessful conceptions (including those of 30 April 1996), the implementation of the "Programme of the Coal Mining Reform in Poland, 1998-2002" was commenced. The main goal of the reform has been to achieve profitability in coal mining corporations, together with capacity and personnel reductions, with simultaneous liquidation of selected mines.

In addition to the development strategies and sectoral policy programmes, legal regulations constituting the institutional support were undertaken, both centrally and locally. They included, first of all, the following:

- investment incentives in communes struck with structural unemployment - they provide for the opportunity to lower income tax for those investors who establish new jobs,
- special economic zones, established on the basis of the Act of 20 October 1994, in the regions capable of accelerated development or those particularly struck with the economic crisis,
- regional aid programmes of the European Union [e.g. PHARE - Struder, the first regional programme in the Central and Eastern Europe concerning areas with outdated industrial and agricultural structures. In Poland, this programme has been applied in the industrial centres of the Górnośląski (the former Katowickie voivodeship), Sudecki (the former Wałbrzyskie voivodeship) and Łódzki Regions; SAPARD; Polish-British Entrepreneurship Programme with the Know-How Fund; ISPA].

In 1999, the implementation of the Special Programme of Preparation to Structural Funds (PHARE '98) was commenced as well. The chief objective of this Programme is to prepare central and regional government officers to accomplish the tasks related to the programming and implementing of regional policy tasks both in the pre-accession period and following the Poland's joining the European Union. Under the specific reserve fund designated for the co-financing of the SPSPF, the preparation of regional development strategies has been supported. Strengthening of local administration has also been financed from the resources granted by PHARE '97, INRED and European Integration programmes. Bilateral co-operation included training, workshops and study tours to the member countries of the European Union.

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