

THE EVOLUTION OF PARTICIPATORY BUDGETS IN POLISH LOCAL GOVERNMENTS: THE CASE OF THE LODZ PARTICIPATORY BUDGET

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ABSTRACT

Motives: The article examines the evolution of participatory budgeting (PB) in Poland over more than a decade, using the Lodz Participatory Budget (LPB) as an example. It explores the origins of PB, tracing it back to Brazilian Porto Alegre and how it has been adapted within the Polish local government system. It analyses the changing logics and drivers of PB, showing how, under specific formal and informal institutional conditions, PB has evolved into a tool balancing administrative efficiency, citizen participation, and local democracy.

Aim: The study is based on the example of Lodz, which has continuously implemented PB since 2012. It aims to highlight key transformations in local governments and to demonstrate how PB influences democratic participation.

Results: The article reveals that the most significant changes are driven by institutional factors, particularly amendments to local legal regulations. These modifications shape the scope and effectiveness of PB, determining how it functions as a mechanism for involving residents in decision-making and fostering engaged local democracy.

Keywords: participatory budget, social participation, local democracy, Local Self-Governments, Poland, Lodz

INTRODUCTION

Participatory budgets (PB) are becoming an increasingly common tool for involving residents in decision-making processes in local governments. In Poland, they operate in more than 320 local governments (Pistelok & Martela, 2019, p. 19) and are constantly evolving (Martela et al., 2023). While previous research on urban participatory budgets in Poland focuses mainly on cooperation between activists and officials (Brol & Derlukiewicz, 2023),

there is a lack of perspective on strengthening local democracy, in the context of the institutional transformation process itself. The development of local democracy through the PB process has been noted in the literature in several contexts: building a strong civil society (Džinić et al., 2016), challenging entrenched political – administrative structures (Sinervo et al., 2024), as well as improving decision-making concerning the allocation of public funds (Budziarek, 2019; Lehtonen, 2022). However, a little attention has been paid to perspectives that capture the institutional

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evolution and the transformations it brings about in the sphere of public debate and the local self-government organization and functioning. The process is sufficiently dynamic that observable cultural changes varying in their levels of engagement – confront and reshape the perspectives underlying relations between actively involved participants and those responsible for implementing PB in practice. The paper describes this evolution based on a case study of Lodz¹, seeking to generalize the results to describe PB changes in Polish institutional conditions, in terms of their reciprocal impact, i.e., either citizen involvement in changing the PB rules or incremental changes in these rules affecting citizen participation. Lodz was one of the first cities in Poland to introduce PB, and this tool continues to function without interruption to this day. The study seeks to determine the factors that influence changes in participatory budget mechanisms from an institutional perspective.

The first two parts of the article describe the concept of participatory budgeting – its origins and evolution, and the prospect of using this tool in Poland (including differences from the original assumptions and criticisms). The third part describes the research materials and methods. The following part describes the LPB case study, including the quantitative changes that have occurred. Part five contains the results of interviews with project leaders and local government experts involved in reviewing projects. The article concludes by emphasizing the continuous institutional transformation of the PB process as an intersection between the social and cultural environment of governance and administrative efficiency. Despite the challenges that necessitate limiting the influence of strong interest groups, the process effectively builds social capital and educates citizens about the functioning of public administration, while the active involvement of residents fosters trust in public authorities and supports sustainable development.

¹ The official name of the city in Polish is “Łódź”; however, for the purposes of this study, the international spelling “Lodz” is used.

The concept and evolution of Participatory Budgeting

The concept of PB is not new and is used in many countries (Dias et al., 2021, p. 49). As a mechanism representing the highest level of civic participation (Serzysko, 2015), PB refers to the concept of participatory governance, whose origins date back to the late 1960s. This discourse on dialogue and cooperation between local authorities and residents was initiated by Sherry R. Arnstein (1969) as the “ladder of participation”. The involvement of civic leaders in community organizing and the empowerment of marginalized groups have also been identified as relevant to the process (Alinsky, 1971). Since then, citizen participation in governance has been in constant flux, and research on local government has looked at increasingly sophisticated forms of social participation. PB was first implemented in 1989 in Porto Alegre in Brazil, where assemblies of residents were given control over the entire city budget (Bluj & Stokłuska, 2015; Brzeziński, 2017; Górski, 2007). This process was primarily aimed at redistributing municipal resources in favor of more vulnerable social groups through participatory democracy. It was intended to constitute a form of public governance designed to break with the authoritarian tradition of public policy by engaging citizens in the direct participation in the preparation and implementation of the budget, including the setting of investment priorities (Santos, 1998). According to Porto Alegre experiences, PB is based on three main principles:

1. Right to participation (all citizens have the right to participate, and social organizations do not possess special privileges).
2. Combination of various democratic forms (participation should be based on a combination of direct and representative democracy through regularly functioning institutions, whose rules are established by the participants).
3. Objective allocation criteria (funds should be allocated according to an objective method based on a combination of general and technical criteria).

In addition to the above principles, the approach developed by Santos (1998), included also a mapping of participatory institutions and detailed participatory processes.

The evolution of the PB, characterized by continuous learning, gradually led to increased operational complexity. Thus, as both a process and a structure, it has undergone significant transformations since its inception, illustrating the internal dynamics and institutional learning of both the state and civil society (Santos, 1998). Since the 1990s, the idea has spread to other countries, albeit in altered forms. The beginning of the 21st century brought a global expansion of PB, with the mechanism now present in 47 countries and implemented in more than 3000 localities worldwide (Rocha Franco & Ficher, 2019). Some of the more notable participants in this process are Polish local governments (Arcimowicz & Łaciak, 2024).

The PB is perceived as a dynamic political process that has fostered a culture of conflict and negotiation rather than a culture of protest and clientelism. In consequence, we may distinguish two main frameworks describing the PB evolution: participatory and deliberative one. The first strand refers to the struggle against social injustices and the idea of “the right to the city”. It reflects a desire to reclaim power for citizens and build social relations to create an urban community as opposed to a consumer society, with greater empowerment of marginalized social groups (Harvey, 1973; Lefebvre, 2003). The second strand expects participation to build a culture of democratic discussion and an opportunity to improve urban quality of life and the standard of public services. It departs from the perspective of conflict in favor of building a local identity and recognizing the benefits of cooperation between citizens and local government (Castells, 1983; Habermas, 1987). PB then aims to articulate community needs and local development priorities through democratic deliberation. It is intended to manage local budgets more efficiently and based on real social interaction (Serzysko, 2015). PB is also a tool to stimulate community actions for social

goals, both directly, through committed leaders, and indirectly, through leaders who mobilize residents (Putnam, 2000). It has the potential to transform urban democracy by including residents in decision-making (Fung, 2009).

The PB process in Porto Alegre, despite being recognized as a global model of democratic participation, did not escape operational problems and was suspended in 2017, after 28 years of functioning (Núñez, 2018). Changes in political will and flaws in the institutional design of the process itself led to its weakening and bureaucratization. Thus, regardless of the motives for promoting the spread of practices of participatory budgets, to ensure their effective implementation, well-functioning institutions are necessary. These institutions are defined as the customs, practices, regulations, and laws that shape the interactions between individuals, groups, and organizations (Edquist & Johnson, 1997, p. 46; Sokołowicz, 2015, p. 82). They can be both formal (e.g., legal norms) and informal (customary patterns of behavior) (North, 1986, p. 231), forming specific “rules of the game” in the economy and society (North, 1997, p. 5).

The institutional perspective allows for a better grasp of modern local government mechanisms (Sokołowicz, 2024, p. 73). At this level of democratic practices, formal institutions alone cannot safeguard against the formation of interest groups, the risk of bureaucratic inefficiency, or poor resident commitment to participation (Purcell, 2006). Thus, a variety of local actors (e.g., authorities, NGOs, business owners, and community leaders) is needed to build a rich local institutional milieu (Bristow & Healy, 2014), where new ways of dealing with scarce resources and managing local common goods may emerge (Polko et al., 2021, p. 59).

These new solutions can take various forms, including the participatory budget, which allows citizens to participate in decision-making and the allocation of public resources. It may include broader segments of society in discussions and voting on spending priorities for local budgets, as well as monitoring the budgeting process (Bartocci,

2022). Fung (2006) proposed a classification of public participation mechanisms in governance based on three key institutional dimensions, which together form an institutional design space known as the “democracy cube”:

1. Who participate?
2. How participants communicate and make decisions?
3. Link with policy or public action.

The above elements define the scope of participation, the methods of information exchange and joint decision-making, as well as the degree of authority. Actions allowing for a greater degree of participation can enhance the legitimacy, justice, and effectiveness of governance, but no single participatory mechanism is suitable for achieving all three values simultaneously. A public policy or action is legitimate when citizens have good reasons to support or obey it (Fung, 2006, p. 70).

For a PB to be defined as a democratic process, it must meet several criteria (Sintomer et al., 2008):

1. It must have a financial dimension.
2. It must function at the level of the entire local government.
3. The process must be used continuously and repeatedly in annual editions.
4. Decisions should be made deliberatively, with citizens discussing the feasibility of proposed projects.
5. The process must be credible, i.e. guarantee of the selected projects implementation.

Over time, researchers have begun to distinguish specific institutional PB models. For example, Benjamin Goldfrank (2007) identified four normative approaches to PB: radical democratic, orthodox leftist, liberal, and conservative. Yves Sintomer et al. (2008), referring to the origins of PB, the way meetings are organized, the forms of deliberation used, and the role of civil society, identified even six implementation models (see also Sintomer et al., 2012). Such richness of PB classification illustrate the diverse directions in which participatory budgeting has developed over the years. From the perspective of the tool’s evolution, this offers numerous opportunities for wide-ranging

application, and the selection of a specific process for study may produce very different outcomes when compared with processes operating under other models. Moreover, it reveals the institutional diversity of approaches to this form of social participation, making it difficult to speak of a single approach to participatory budgeting.

Research on the PB process in various contexts has also been conducted by other scholars. Regarding the sustainability of the process, Mária Murray Svidroňová et al. (2023) identified its influence on the continuation and existence of the PB through three groups of factors: economic, political, and organizational (institutional). Moreover, from a philosophical and axiological perspective, research on the PB was also conducted by Urszula Zawadzka-Pąk (2021), who presented a critical stance toward the process as an ideological instrument. These studies provide insights into the factors shaping both the durability and constant evolution of PB, encompassing economic, political, organizational, and ideological dimensions. Integrating these perspectives is crucial for understanding the institutional transformation of PB, including both its internal dynamics and the broader socio-political context. The multiplicity of approaches to examining this tool underscores its interdisciplinary nature and reflects its extensive development, which, given its principles and scope, affects all participants in the process.

In the framework of short- and long-term studies on the impacts of the PB on individuals, communities, and governments, collective analyses are conducted by People Powered (Wampler et al., 2025). These studies indicate that the PB positively affects participants’ knowledge, skills, and civic attitudes, and leads to social changes (e.g., reduction in infant mortality) and governmental changes (e.g., increased tax revenues and redistribution of public expenditures). However, the ultimate effects depend on the context and the specific implementation of the PB (Wampler et al., 2025). Research conducted by People Powered resulted in the development of a Theory of Change, which, through activities within PB involving learning, deliberation, decision-making, and collaboration,

assumes, among other outcomes, increased trust in government, stronger civil society, more transparency, and more responsive and equitable public spending (Hagelskamp et al., 2021).

The development of participatory tools, such as PB, fosters greater understanding of the world, influencing the culture of political discussion and the +logic of government action. There is growing consensus that the way forward is to focus on both a more active and engaged citizenry and a more responsive and effective state that can deliver needed public services (Gaventa, 2005, p. 17). The change from government to governance, which requires both more active citizen engagement and a more responsive state, establishes participation as a civic right. This leads to a transformation of bureaucratic culture, moving from working “for” the community to acting “with” the community, which in turn requires new attitudes and behaviors. Concepts of active citizenship go beyond the role of citizens as mere consumers of services, involving them in increasingly deep and empowered forms of engagement based on shared responsibility for decisions and the allocation of resources. However, new attitudes, new forms of trust and collaboration, new skills and capacities, new models of leadership and power sharing – all take time to develop and to grow (Gaventa, 2005, p. 25).

Tarson Núñez (2018) proposed recommendations for future participatory initiatives, which should ensure formal transparency, anti-representational mechanisms, systematic development of participants’ competencies, and mechanisms guaranteeing the effective implementation of projects. However, given the diversity of motives for local governments to engage in PB development and bearing in mind the diversity of their institutional typologies, it is not easy to achieve the prerequisites for procedural transparency and the genuine involvement and agency of ordinary residents. Therefore, it is crucial to seek combinations of formal regulations and informal institutions that are optimal for specific territories and combinations of universal and locally differentiated approaches (see Fig. 1).

Participatory Budgets in Polish local governments – institutional characteristics

The characteristics of Polish institutional conditions include their democratic nature (they are open to every member of the local community), formalization (defined by regulations), indirectness, repetition, selectivity (PB procedures involve only a portion of the local budget), and transparency (Kempa & Kozłowski, 2020). PB in Poland increases public service efficiency and engages active social groups rather than emancipates disadvantaged groups, as in the Brazilian prototype (Džinić et al., 2016).

The idea of PB on a large scale in Poland was discussed in 2007 by Rafał Górski, who presented the concept applied in Porto Alegre as an example of participatory democracy. Initially, this idea did not receive a positive response from local authorities, until under the pressure of an informal group called the *Sopocka Inicjatywa Rozwojowa* [*Sopot Development Initiative*], the first Polish municipality decided to implement participatory budgeting procedures. This action influenced the authorities through a bottom-up process, arising directly from engaged residents. The group, founded in 2008, sought tools to implement sustainable development goals and to increase residents’ participation in decision-making, aiming to build local communities (Stokłuska, 2012). Finally, the first implementation of PB in Poland was launched in 2011 in Sopot, with an allocation of PLN 3 million² (Brzeziński, 2017, p. 139; Gałecki, 2013, p. 59). Over time, more Polish cities have implemented PB, including Lodz (2012), advocated by NGOs, who promoted it to city councilors (Lehtonen, 2022). Initially, PB regulations were usually enacted through local laws (usually by mayoral ordinance). In 2018, however, statutory standardization was introduced under Article 5a of The Polish Act on Local Self-Government (1990), defining it as a form of public consultation and mandating a minimum of 0.5% of municipal spending. Subsequent editions were

² That is approximately €705,882.35 at an exchange rate of 1 PLN = 4.25 EUR.

adjusted within the legal provisions framework to meet changing social needs (Sobol & Rzeńca, 2018).

As Polish PB encompasses only 0.5% of the municipal budget, it is sometimes called a double sham game (Pobłocki, 2013, p. 13). Thus, there have been criticisms from the very beginning that point to some weaknesses. For example, through the strong influence of organized interest groups, five categories of financed services dominate (educational, libraries, other cultural institutions, fire departments, and medical institutions). There is also a visible focus on specific projects such as bicycles infrastructure or green areas improvement, and due to a strong lobby of groups centered around local government educational institutions, educational projects accounted for 15% of all winning proposals (Martela, 2021). Other studies point to weaknesses such as irrational decision-making, the instrumental treatment of PB, organizational inaccuracies, and modest funding (Brol & Derlukiewicz, 2023).

This analysis focuses on the institutional perspective, distinguishing four groups of factors that influence the functioning of Polish local PB. These factors are divided into two dimensions: formal vs. non-formal and local vs. national (see Fig. 1).

The first dimension reflects the differences between the institutional nature, while the second relates to their territorial level of action. The combination of the two dimensions allows us to propose four groups of factors that determine the functioning of PB in Poland:

1. Formal and local: these factors are independent of residents but dependent on local authorities.
2. Formal and national: These factors are independent of both residents and local authorities, and they result primarily from nationwide legal arrangements.
3. Non-formal and local: These factors are dependent primarily on residents.
4. Non-formal and national: These factors are independent of residents and local authorities, and they result from nationwide discussions shaping mindsets and attitudes toward PB in Poland.

The first group primarily includes changes in the provisions of local laws. These changes can affect, for example, definitions and the terminology used (the language of the process). They also determine changes in the rules governing the distribution of local PB funds and the selection of projects.

The second group includes legal changes imposed by state institutions and the national legal framework,

		TERRITORIAL SCOPE	
		LOCAL	NATIONAL
NATURE OF CHANGES	FORMAL	Amendments to the provisions of local legislation Changes in the rules of distributing funds and ways of selecting projects Implementaion of mandatory attachments when submitting projects	Changes to the provisions of existing laws Regulation of GDPR rules Changes in ministerial strategies, e.g., "green budget" Stances of associations representing municipalities, e.g., the Union of Polish Metropolises
	NON-FORMAL	Local activism - emphasis on targeted rule changes Mobilization of local leaders Turning point among winning tasks - dominance of a project group Articles in local media Tasks not reflected in the regulations	COVID-19 pandemic Mass influx of refugees from beyond the eastern border Articles in the national media - the impact of public opinion Civic movements and protests Development of digital platforms and participatory tools

Fig. 1. Institutional factors that affect Polish participatory budgeting
 Source: own elaboration.

as well as EU regulations, such as GDPR rules³. It also comprises internal policies and strategies of the central government that affect PB operation mechanisms, e.g., the guidelines for “green budgets”, submitted by the Ministry of Climate and Environment as a participatory tool for climate change adaptation (Government draft bill amending the Environmental Protection Law number SH-020-28/23). National-level institutions can also include nationwide associations of local governments (e.g., the Union of Polish Metropolises) that formulate positions and opinions on issues related to their functioning.

The third group includes informal institutions such as local activism and leaders’ activities, among others, which may influence the changes. This group also includes the local media, which shape local actors’ preferences by disseminating information about PB, as well as solutions arising from unique local needs that are difficult to capture in formal legal language.

The final group covers situations arising nationwide, such as the unpredictable COVID-19 pandemic, armed conflicts causing an influx of potential future participants in the process, or the development of technologies and communication tools to support participatory processes. This group also includes the influence of public opinion, dominant discourses, and nationwide grassroots actions or protest movements.

MATERIALS AND METHODS

To study the evolution of PB in Polish local governments, a combination of quantitative and qualitative methods was used, based on a case study of Lodz. This city serves as an exemplary local government. It was one of the first to implement PB in practice, and has done so continuously since 2012, and it is done on a significant scale for Poland, with

an annual allocation for year 2013 of PLN 20 million (€4,705,882.35 – 0.52% of the city’s budget). In 2013, it was introduced in only 80 local self-governments, while in 2014 it was already implemented in the largest Polish cities, such as Warsaw and Cracow. At that time, the amount allocated to participatory budgeting was PLN 40 million (€9,411,764.70) in Lodz, over PLN 26 million (€6,173,474.82) in Warsaw, and PLN 4.5 million (€1,058,823.53) in Cracow (see Table 1). Thus, from a methodological perspective, it can be considered an instrumental case study (Stake, 1994).

The sources of the data obtained were valuable in themselves due to the limited accessibility of archives, and consequently, the restricted availability of information through public access requests as well as during the review of official documents. An important aspect of the study was also the ability to reach key stakeholders in the process, with whom contact was successfully established and who significantly enriched the collected knowledge and provided context for the phenomena under analysis. However, the number of these respondents was limited, and contacting a broader group of potential participants – particularly those possessing specialized expert knowledge – proved challenging, constituting a significant methodological constraint for the study.

Quantitative methods were applied to examine the scope and structure of subsequent LPB editions, using data from publicly available secondary sources obtained from the City of Lodz. This quantification allowed us to systematize this process from its inception. Secondary sources included local legal acts and jurisprudence, including four Lodz City Council resolutions and eleven decrees of the Mayor of Lodz that defined the LPB rules. Reports of public consultations after each completed LPB process were also examined, as well as the nationwide framework on participatory budgets in Poland, i.e., The Act of March 8, 1990, on Local Self-Government (1990). The analysis of secondary sources covered the eleven-year period in which the LPB process was implemented (2013–2023). In addition, the results of Brzeziński’s (2017) research on the first four editions of the LPB were also incorporated.

³ Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons regarding the processing of personal data and on the free movement of such data and repealing Directive 95/46/EC (General Data Protection Regulation).

Table 1. Funds allocated to PB in 2014 in the largest Polish cities

City	Population	Amount allocated to PB [million PLN] (€)	Share of PB in local public budget expenditures [%]	Amount allocated to PB per capita [PLN] (€)
Lodz	711,332	40 (€9.41)	0.97	56 (€13.17)
Warsaw	1,735,442	26 (€6.17)	0.20	15 (€3.53)
Wroclaw	632,067	20 (€4.71)	0.52	32 (€7.53)
Gdansk	461,531	11 (€2.59)	0.40	24 (€5.65)
Poznan	548,028	10 (€2.35)	0.35	18 (€4.24)
Cracow	758,992	4.5 (€1.06)	0.11	6 (€1.41)

Source: own elaboration based on data from Statistics Poland (GUS) and information on PB obtained from the official websites of city offices.

Primary materials were analyzed, including the 2193 winning projects from all editions of the LPB, which were categorized according to the City of Lodz Office classification system. Supplementary sources included two articles from the local press and two from a blog run by an activist and city councilman.

Qualitative empirical material was also obtained in the form of transcriptions of individual in-depth interviews (IDIs) with ten people, including six people who were project leaders in the LPB, and four experts involved in reviewing projects from the City of Lodz Office. The interviews were conducted between November 2023 and May 2024, with the interviewees remaining anonymous. The interview scenario was divided into three sections covering 16 questions. The first section (three directional questions) dealt with the history and experiences of the interviewees' involvement in LPB activities. The second part (seven questions) explored perceptions of the LPB process and the accompanying changes. Part three (six questions) focused on the specific role of educational institutions in LPB and the interviewees' experiences with this specific task group. The average duration of the interview was about 40 minutes. After the interview, the recordings were transcribed, the content anonymized, and the responses coded. In the quotations used in this study, the codes L1 to L6 denote statements by task Leaders, while E1

to E4 denote statements by people with expertise in reviewing projects, hereafter referred to as "Experts". The information obtained was later grouped into three main areas:

1. LPB as a mechanism to involve residents in the governance process.
2. Disruptions caused by municipal interventions in the process.
3. Convergence and divergence of opinions about PB among Leaders and Experts.

The choice of qualitative methods was justified by the nature of the research problem – PB as a participatory instrument, relies on interactions between the administration and citizens, deliberation processes, and co-decision mechanisms, which are difficult to capture using quantitative methods alone. Content analysis of official documents and in-depth interviews enabled the identification of patterns of action, an understanding of the dynamics of collaboration between the administration and citizens, and an assessment of the impact of participatory tools on decision-making processes.

Given the limited number of available respondents and the challenges in reaching a broader group of potential participants, qualitative methods allowed for the maximal use of available sources and the incorporation of the contextual factors in which these mechanisms operate.

RESULTS

Dynamics and evolution of the Participatory Budget – a case study of Lodz

The Lodz Participatory Budget has emerged as a significant tool for collaborative governance in the city. Over eleven years, 11,915 projects were submitted, averaging 1083 per edition. These projects covered both neighborhood-level initiatives (formerly known as local or district projects) and supra-neighborhood initiatives (formerly referred to as city-wide projects). The lack of an upper limit on project submissions allows residents to submit various proposals.

The LPB is one of the largest in Poland. In 2019, residents of all Polish voivodship capitals submitted 5210 projects, with Warsaw, Lodz and Cracow in the lead (Kociuba & Bielecka, 2021). In 2020, Lodz recorded a record number of voters (162,700), surpassing both Warsaw and Wroclaw (Kociuba & Bielecka, 2021). In 2022, participatory budgets involved 250 cities with more than 5000 residents, with nearly 14,800 projects submitted (Martela et al., 2023). More than half (7599) were submitted in Warsaw, Lodz, and Cracow, i.e., large cities with over 200,000 residents (Martela et al., 2023).

The LPB process corresponds, in Sintomer's et al. (2008) typology, to the "consulting public finances model". However, in the researchers' later work (Sintomer et al., 2012), the process can be classified as a "participative modernization model". One of the characteristics of this model is that its main goal is to improve administrative efficiency and strengthen public trust in local authorities. Within this framework, residents vote on a small portion of the municipal budget, and the process is legally defined as a special form of public consultation. This mechanism is also an institutionally embedded, citywide component of broader democratic reforms, which also serve to build a modern image of the city and to promote civic education in the areas of public finance and bureaucratic procedures (Lehtonen, 2022). The stages of project submission and selection

through voting are decided by residents, yet the role and influence of local authorities in verification, selection, and implementation remain significant. The allocation of funds is decentralized (divided into neighborhood and supra-neighborhood pools), but it does not involve major or comprehensive budgetary decisions, focusing instead on small-scale local investments and "soft" activities such as outdoor cinemas. The LPB – similarly to other PB processes in Poland – relies more on consultative and plebiscitary mechanisms than on deliberation or participatory budgetary control.

The schedule has varied between editions; however, in recent years it has typically begun with the preparation of formal documents enabling the launch of the procedure, such as the decree of the Mayor of Lodz. This is followed by the project submission stage, during which residents can submit their proposals within a specified timeframe. Next comes the formal assessment stage (verification of required signatures and attachments), followed by a substantive assessment. Dedicated municipal departments review the projects from multiple perspectives, including compliance with the City Council resolution that regulates the LPB, alignment with strategic documents, one-year feasibility, cost-effectiveness, financial viability, and principles of universal design, etc. At the same time, auxiliary municipal units called the Neighborhood Councils, may provide their opinions on the submitted projects. The results of the first substantive assessment are then presented during Social Analysis meetings with residents, offering an opportunity for public discussion with municipal experts regarding the submitted proposals. Subsequently, open sessions of the Participatory Budget Committee of the City Council are held, during which councilors review the assessments provided by the municipal departments and Neighborhood Councils, and express their opinions on the proposed projects. The Committee is composed of members of the Lodz City Council. After these sessions, the Coordination Committee – comprising directors of departments and offices of the City of Lodz Office – issues the final decision on which

projects will be admitted to the voting stage, based on the three sets of opinions: from the municipal departments, Neighborhood Councils, and the City Council Committee. Residents whose projects were rejected at this stage have the right to appeal the decision. Based on the appeals, a second meeting of the Coordination Committee is convened to approve the final list of projects eligible for voting. The voting stage also takes place within defined time limits. Residents can vote either in paper form at the organizer's office or electronically via a dedicated web application. Any city resident, regardless of age, may vote, provided they have a PESEL number (national identification number). Each resident may cast up to five votes in the neighborhood pool (across two neighborhoods of their choice) and up to five votes in the supra-neighborhood pool, but the two pools cannot be voted on separately. Votes are verified using the PESEL number and, in the case of electronic voting, a phone number to which a confirmation SMS code is sent. Based on the voting results, projects are selected for implementation in the upcoming budget year and included in the list of municipal budget tasks. Projects with the highest number of votes (at least 50 votes in the neighborhood pool and 100 in the supra-neighborhood pool) and fitting within the available funds are selected for implementation. Projects approved for implementation reduce the pool of available funds for subsequent projects, while any unused funds in the neighborhood pools are transferred to the supra-neighborhood pool. The results of the vote are announced during a formal ceremony, where project leaders receive diplomas and awards for their success in the LPB. At the end of each cycle, the LPB process is evaluated, for example through surveys distributed to the stakeholders involved in the process.

The LPB is a cyclical, annual process whose stages of activity correspond to the assumptions of the Theory of Change (Hagelskamp et al., 2021). The principles of this new participatory instrument are undergoing continuous evolution, and each element of change represents a critical event that strongly influences subsequent editions. The elements indicated on the timeline (see Fig. 2) graphically illustrate the

visible differences in the process compared to previous versions of the LPB.

However, the LPB has also faced controversy. Local media have criticized it for favoring renovations of school kitchens and the unequal power struggle between residents and institutions (Bujalski, 2019; Mysior-Pajęcka, 2022). Such projects improve quality within the schools, but they do not comply with LPB regulations because they are not publicly accessible to all city residents, being limited only to the students and staff of the given institution. Local activists have also criticized the misuse of paper voting, suggesting reforms such as limiting it to designated voting points (Nykiel, 2023). This collective criticism has mobilized residents and stimulated discussion about changes to the LPB rules.

The first LPB was allocated PLN 20 million (€4,705,882.35) in 2013 and PLN 40 million (€9,411,764.70) a year later. In 2016, the procedures were revised, moving from a system where residents submitted proposals for five districts to one encompassing 36 neighborhoods. This change reduced competition among project imitators and mobilized more community members (Brzezinski, 2017). The fifth edition excluded projects on state-owned land. In 2018, amendments to The Act on Local Self-Government (1990) made PB mandatory in the largest Polish cities (with county rights), obliging them to allocate at least 0.5% of their budget to it. In the seventh edition, the City of Lodz increased PB funding to about PLN 50 million (€11,764,705.88) (more than 1% of the city budget), lifted the restriction on proposing projects on state-owned land, and allowed people under 16 to vote. At the same time, city council resolutions regulating PB replaced the previous, more flexible mayoral ordinances. The seventh edition was unique in that it was the only one to exclude city-wide projects in favor of neighborhood projects.

In 2020, projects for educational, health, and cultural institutions (excluding libraries) and certain green areas were moved to a supra-neighborhood pool. To ensure that municipal organizations had a say in the projects that concerned them, a provision was introduced requiring the attachment of an

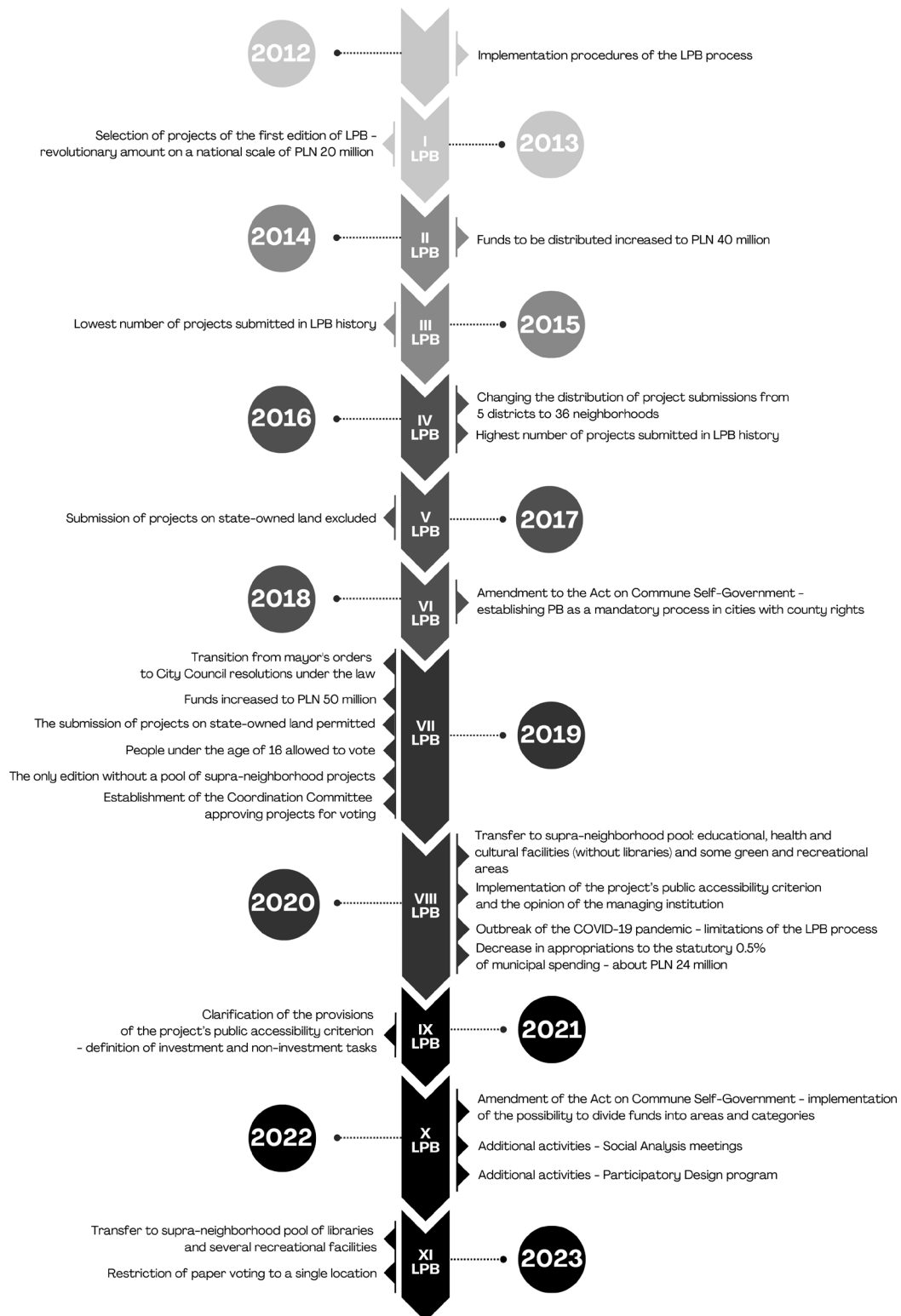


Fig. 2. Critical events in the implementation of the Lodz Participatory Budget
 Source: own elaboration.

“institutional executive’s opinion”, which was issued by the director of for example a given school or health center to ensure public accessibility. On the other hand, to protect citizens from being dominated by strong organizations, the “criterion of public accessibility of the project” was implemented. This ensured that the benefits of the projects would be accessible to the public, not just the stakeholders of individual organizations. The COVID-19 pandemic reduced the available funds back to 0.5% of the city’s budget and imposed other restrictions on the entire process⁴.

In the ninth edition, “the criterion of general accessibility” of projects was refined to ensure that project outcomes would be available free of charge for at least 30 hours a week. Additionally, rules for recruitment were specified in cases where the number of places was limited (e.g., for events, classes, courses and training). This edition also distinguished between investment (*hard*) and non-investment (*soft*) projects.

While the 2022 amendment to The Act on Local Self-Government (1990) made dividing funds into areas or categories possible, the latter solution was not applied in the LPB. Instead, accompanying processes such as social analysis and a participatory design program were introduced. The 11th edition of the LPB moved more recreational facilities and libraries to the supra-neighborhood pool and limited paper voting to a single venue.

The distribution of projects completed in successive editions of the LPB varied significantly between categories (see Fig. 3). Across all editions, the largest group is “Green Areas and Environmental Protection” accounting for 21.48% of all projects. However, this dominance emerged only from the 10th edition, following earlier changes in the LPB rules, especially in the eighth edition. These changes were prompted by increasing social tensions, including urban activists’ claims that projects associated with or initiated by the city’s local government organizations were favored. Criticism focused especially on the “Educa-

tion, Children and Youth” and “Culture and Heritage” categories, with activists making public appearances in the local media. They alleged errors and loopholes in the functioning of the PB process and demanded equal rules for all project submitters.

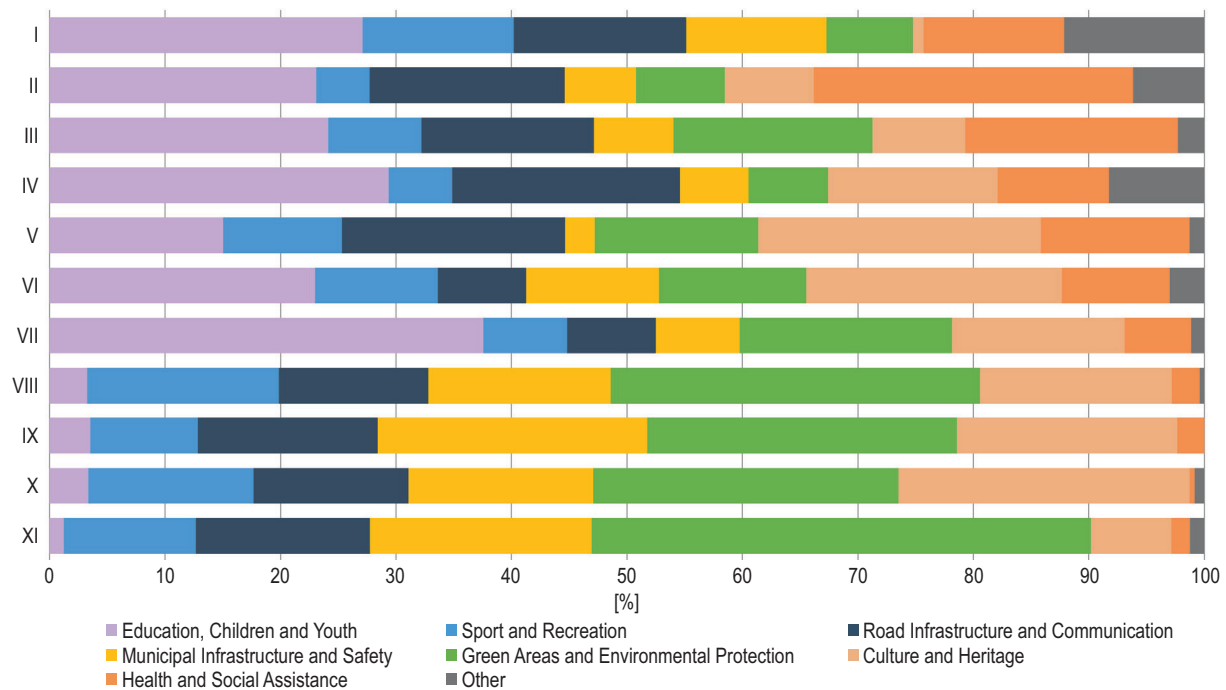
As a result, the most controversial categories were transferred to supra-neighborhood pools and large complexes of green areas. Consequently, the number of initiatives in the “Education, Children and Youth” category dropped significantly from 98 (27.55%) to 8 (3.24%). Although on a smaller scale, a similar situation occurred in the “Health and Social Assistance” category, which saw a decrease from 15 (5.75%) to 6 (2.43%) projects. The remaining categories saw increases in the number of projects, with the “Green Areas and Environmental Protection” group gaining the most, from 48 (18.39%) to 79 projects (31.98%). The transfer of some of the task categories to the supra-neighborhood pool in the 11th edition caused a noticeable decline in the “Culture and Heritage” group, from 60 (25.21%) to 17 winning projects (6.94%).

Paper voting has been controversial from the beginning due to its potential for abuse, as indicated by the fluctuating popularity of this form (see Fig. 4)⁵. Press releases documented instances of improper use, including the collection of multiple votes simultaneously by school students (Mysior-Pajęcka, 2022). In 2023, the number of paper voting stations was formally reduced from five spread around the city to just one supervised by the authorities. This change triggered a sharp decline in the number of paper votes and an increase in electronic voting.

Since the first edition of the LPB, the rules have been continuously updated, impacting the strategies of project leaders. These changes also affect the pool of funds available each year and the number of submitted and selected projects (see Fig. 5). The first noticeable action was the previously mentioned change in the project selection rules, identified as primarily a formal and local institutional factor (see Fig. 3). In the 3rd and 4th editions, there was a noticeable

⁴ This edition started with a significant delay. The decision to implement was not announced until June 15, 2020, which may have limited the scale of applications. By comparison, the 2019 edition began on May 17 and the 2021 edition on April 30.

⁵ Paper voting was limited to filling out a ballot and dropping it into a ballot box set up at city facilities.



Note: Assignment to groups was made by the City of Lodz Office staff and changed over time. For example, the “Bicycle” category, which functioned in editions I–VI, has been included in the “Road Infrastructure and Communication” group since edition VII.

Fig. 3. Structure of winning LPB projects by category for each edition

Source: own elaboration based on data from the City of Lodz Office.

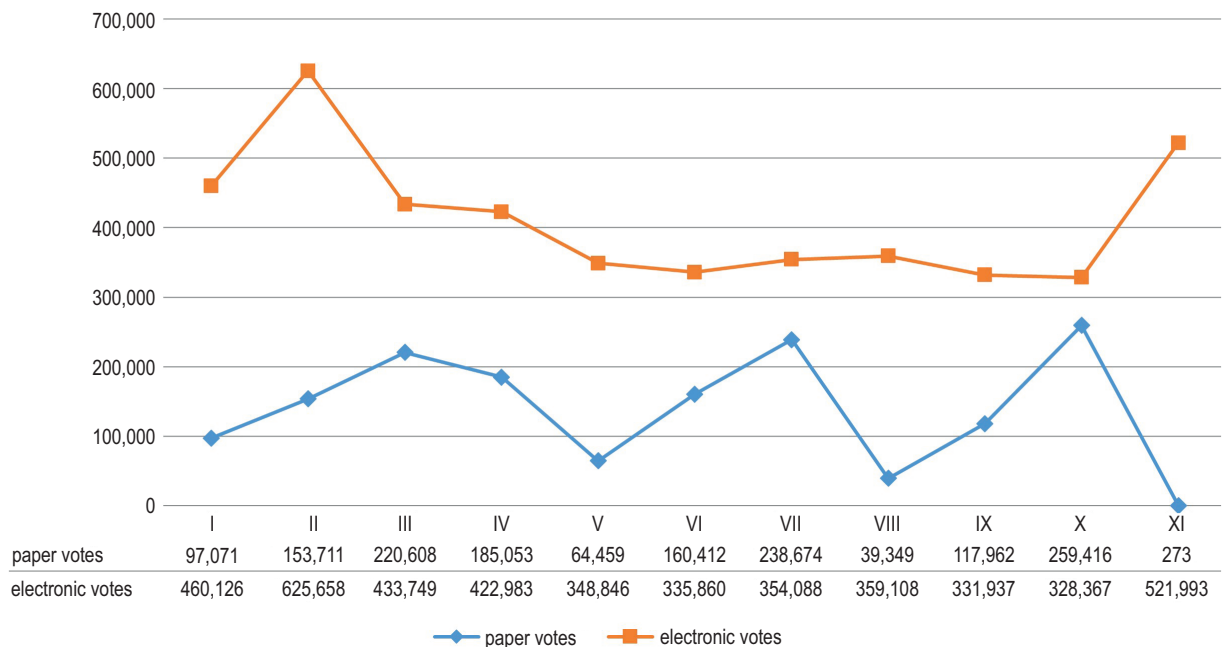


Fig. 4. Paper vs. electronic votes in the Lodz Participatory Budget by edition

Source: own elaboration based on data from the City of Lodz Office and Brzeziński (2017).

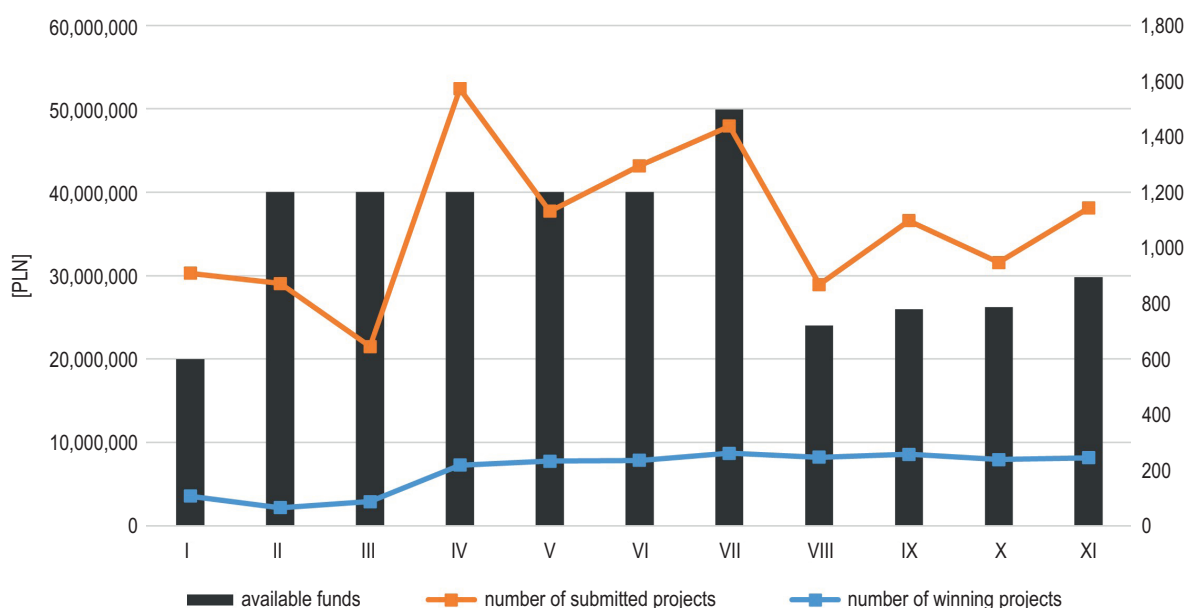


Fig. 5. Submitted vs. selected projects and available funds of the Lodz Participatory Budget by edition
Source: own elaboration.

increase in the number of submitted projects by more than 143% and the number of selected projects by more than 150%. The decrease in the number of projects from the 4th to the 5th editions by more than 28% can be attributed to the prohibition of submitting

proposals on state-owned land (a formal and local institutional factor).

Funds increased in the 7th edition to about PLN 49.9 million (€11,741,176.47), resulting in the second-highest number of submitted projects. Notably, it was

Table 2. Summary of Submitted and Winning Projects, Financial Resources and Votes from Eleven Editions of the LPB

Year of Submission (Edition)	Available Funds [million PLN] (€)	Number of Submitted Projects	Number of Winning Projects	Success Rate* [%]	Number of Residents	Number of Votes
2013 (I)	20.0 (€4.71)	908	107	11.78	711,332	557,197
2014 (II)	40.0 (€9.41)	871	65	7.46	706,004	779,369
2015 (III)	40.0 (€9.41)	645	87	13.48	700,982	654,357
2016 (IV)	40.0 (€9.41)	1,572	218	13.86	695,503	608,036
2017 (V)	40.0 (€9.41)	1,131	233	20.60	690,422	413,305
2018 (VI)	40.0 (€9.41)	1,295	235	18.14	685,285	496,272
2019 (VII)	49.9 (€11.74)	1,438	261	18.15	679,941	592,762
2020 (VIII)	24.0 (€5.65)	868	247	28.45	673,003	398,457
2021 (IX)	26.0 (€6.12)	1,097	257	23.42	664,860	449,899
2022 (X)	26.2 (€6.16)	947	238	25.13	658,444	587,783
2023 (XI)	29.8 (€7.01)	1,143	245	21.43	652,015	522,266
Total	375.9 (€88.45)	11,915	2,193	18.40	-	6,059,703

*Share of Winning Projects in the Pool of Submitted

Source: own elaboration based on data from the City of Lodz Office and Statistics Poland (GUS).

the only edition without a pool of supra-neighborhood projects, reflecting an institutional change that was formal in nature and local in scope. The decrease in funding and the number of projects from the 7th to the 8th edition was due to both the COVID-19 pandemic and activist pressure after discontent with the previous edition. Selected categories were then transferred to the supra-neighborhood pool, and “the criterion of general accessibility” was introduced, which was clarified during the 9th edition. This change led to an increase in the number of submitted projects despite only a slight increase in available funds. In the 11th edition, influenced by activists and the media, the use of paper ballots was reduced, and projects proposed for city library branches were moved to a supra-neighborhood pool.

The number of selected projects from the eleven editions was 2193, accounting for 18.40% of the projects submitted. The highest success rate was achieved in the eighth edition (28.45%), suggesting a large share of applications with low financial commitment, averaging PLN 97,165.99 per project (€22,862.59). In contrast, the second edition involved more costly activities, with an average cost of PLN 615,384.62 (€144,796.38). The detailed distribution is presented in Table 2.

The evolution of the Lodz Participatory Budget from the active participants perspective

To address the changes in the development of PB as a form of citizen engagement, individual in-depth interviews (IDI) were conducted with organizers (experts from local government institutions) and leaders involved in the application process. The discussions addressed three aspects: (1) The LPB as a means of involving residents in the governance process, (2) perceived irregularities due to municipal interventions, and (3) the convergence or divergence of perspectives between leaders and experts.

Regarding the first aspect, the leaders and experts presented their positions on three statements: attitudes, needs and proposals. Both groups pointed

out that the successful implementation of winning projects is the best way to promote PB, and the rule changes implemented are visible and well-received. LPB is seen as a tool that allows for the implementation of interesting projects and increases residents’ engagement.

L1: “Tangible proof of this activity lies in the fact it persuaded hundreds of people to take part. It also gives you satisfaction as you walk around the city and see the effect of a project submitted here [...]. It motivates you to keep going and change the city in at least some aspect”.

On the other hand, the disadvantage is that the voting phase is limited to signing proposals without a willingness to engage further in the process. Some leaders sought to persuade residents to support a specific project without explaining its significance or the broader participatory budgeting process, thereby exploiting people’s lack of awareness, which often resulted in them casting only a single vote without realizing they could choose more projects.

A noticeable difference in LPB perceptions was the tremendous enthusiasm that leaders showed, focusing on its good points. In contrast, the experts viewed the LPB as a way of treating symptoms rather than causes (e.g., underfunded public services).

Both leaders and experts noted the need for timely implementation, keeping pace with needs, and changes in the attitudes of authorities towards local leaders. The leaders also noted the educational aspect of the LPB and suggested introducing additional tools to teach about public participation from an early age.

L2: “The city is changing under the influence of the budget and manages to introduce interesting changes and elements that did not work before. *Woonerfs*⁶ are a flagship example, which had hundreds of opponents, including decision-makers and people with power to influence the city space. These projects were shouted down, but they have proven successful and are now a showpiece and change this city”.

⁶ Woonerf (Dutch origin) is a living street (home zone) which include shared space, traffic calming, and low speed limits.

Proposals for changes to the LPB were diverse and included a further shift away from the paper form, organizing additional meetings (e.g., workshops and leadership fairs), using new communication tools, such as text messages, and the Lodz Citizen's Card application, which has been operational since 2021. The interviewees also suggested some rule changes, e.g., excluding city organizational units as LPB voters or creating a separate pool for them, random allocation of project numbers, or doubling the funds to 1% of the city budget. The experts, in turn, suggested a complete overhaul of the process, such as regranting, general area visioning to fill it with projects, and reversing the order of the procedure, i.e., voting first and then evaluating projects. They also suggested using more deliberative forms of discussion about the city:

E1: "The city could operate on a regranting basis, where the money would go to individual neighborhoods that make their own spending decisions, somewhat analogous to village funds. If neighborhoods decide to implement projects, the city could help them to promote and carry out the whole procedure, implementing the projects in cooperation with the neighborhoods".

E2: "This should be a somewhat controlled process – not by imposing projects but assuring the consistency of these projects with the space in which they are implemented. They do not even have to be perfect pieces of a puzzle that fit together to form a coherent whole".

Both groups agree that this is a process in which, each year, both new participants and regular leaders submitting ideas are visible:

L1: "There is certainly, let's call it, a core group of people who, for several years – almost a decade or more – have been submitting projects practically from the very beginning. These are often local leaders who, in their own neighborhoods, identify a need for change and submit projects there year after year. This is a fairly large group. Then there is a second group, consisting of people who either appear and disappear, or who join the group of long-term leaders if they also see the results of their actions. There are also many people who were involved in one or two editions but

then disappeared for various reasons – sometimes personal, sometimes simply because they no longer felt motivated to participate".

E3: "Of course, there are certain names that are already so well-known that if someone were woken up in the middle of the night, they could probably make a list. But it seems to me that new people appear every year, which is visible from the projects. You can also see it from the questions that are asked – these always come up – which further indicates that new participants are joining".

The second issue involved possible misconduct, especially concerning interference from municipal units (e.g., educational institutions) in genuine social engagement. Both the leaders and experts noted some problems in this regard, such as unethical approaches to PB by schools and health municipal organizations, including the use of citizen databases for voting without their consent, or awarding good marks for behavior in schools for collecting votes.

L1: "It was the case, for example, that clinics cast votes for their patients, and then those people could not vote. My grandmother wanted to vote in the budget for my projects, and we got a message that the vote was already cast from the PESEL [national identification number] database".

L3: "At school assemblies, parents and their children were forced to bring ballots to take screenshots from the monitor and send them to the school administration informing them they had voted for the school project. This is highly unfair and immoral, which is why I think it should be eliminated. It should be the other way around; their primary role should be to make children aware of what participatory voting is and what the participatory budget is all about".

E3: "I feel that the municipal organizations started thinking that if it is not in their interest, they should let things go a little bit. Because of this, the educational element of the budget itself has fallen by the wayside. Their thinking is: If we do not get anything, we should not talk about it anymore. But after all, no matter what ideas these organizations have, they should use the [participatory] budget as a super opportunity to show young people how the city functions in practice".

The third issue concerned the convergence and divergence of opinions between leaders and experts. Both groups positively perceived the existence of the LPB as a process that gives a sense of empowerment to the city residents submitting their projects, and they also supported modifying the rules based on identified weaknesses. Both claimed promotion of the LPB is satisfactory, but more effective implementation of chosen projects would complement it. An important aspect was the education of children and youth, as well as regulating the involvement of educational institutions to eliminate their excessive influence over ordinary citizens.

There were discrepancies in the reasons for engaging in the LPB and in the broader view of the process. The leaders focused more on improving existing procedures, while experts portrayed the LPB as a tool that requires nationwide discussion. The tool was seen as positive but prone to abuse. Changes were viewed positively, but full transparency of the process and updates to procedures were expected. According to the respondents, the biggest challenges facing the LPB included its ability to respond to changes, guard against rogue leaders, and ensure effective practical implementation. Educating stakeholders from an early age and having a deep discussion at the national level on the PB concept were deemed essential.

E1: “From the beginning, I have seen the Lodz Participatory Budget as one of the best participation tools that... does not work. Participatory budgets worldwide are divided into two basic groups – tools that enable public participation and tools that teach public participation. From the beginning, we wanted the Lodz Participatory Budget to be the former [...]. The role of the official, the clerk, was limited to the minimum, that is, to check whether this project is feasible, without discussing whether it is substantively needed or fits into a broader framework [...]. The fact that residents began to look for advantages and began to play to their interests very quickly revealed that we cannot talk about a city with a capital “C” as a common bloodstream; it is not an urban organic fabric of male and female residents but rather a sum of egoisms. It revealed our error in assumptions,

at least at the ideological level. In Lodz and Poland, the participatory budget is not a tool for participation but should be a tool for learning participation”.

E1: “Looking at the participatory budget from the perspective of a single resident, he or she has little influence over what it looks like. [It] is influenced by someone who, for example, sits in Warsaw and does not see me as a flesh-and-blood resident [...]. I want the discussion about the participatory budget to be an expert discussion. If it cannot be done otherwise, I want the participatory budget to be discussed by civic senates and civic panels, proposing binding changes; I do not want the decisions to be made by someone we do not really know”.

DISCUSSION

Participatory budgeting as a form of public participation is constantly developing, which also applies to the Lodz Participatory Budget. Since its introduction, the LPB has been regularly adapted to changing social and legal conditions. Its history reflects general participation trends, considering local community needs. Changes to the rules, such as moving some projects to a supra-neighborhood pool and limiting paper voting, are intended to make the process more streamlined and transparent. They also respond to the social commitment of project leaders, who, by mobilizing residents, influence community development by building their awareness and strengthening their ability to collaborate and build a culture of participation in local democratic processes.

The obtained results revolve around two concepts that emerged during the conducted research and are significant for the functioning of PB in Poland. The first of these is the evolution of the PB process, where, using the example of the Lodz Participatory Budget, one can observe its constant institutional transformation. According to Gaventa (2005), the ongoing evolution of participatory tools such as PB leads to greater mutual understanding of the world and to a change in the roles and attitudes of its stakeholders. The second concept that emerged

from the research is a side effect of the initial need to meet political goals. Beginning with the history of PB in Sopot, city authorities decided to introduce the PB process in response to residents' expectations. As a result, a group of citizens actively participating in the life of local self-government appeared, becoming a visible circle of stakeholders. Awareness of their influence on the implementation of certain tasks contributed to the increased importance of influential participants in investment processes – namely, the residents themselves. On the other hand, local politicians gained a mechanism to observe the needs that residents express to city authorities through PB. Although both quantitative and qualitative research results do not show an upward trend in terms of broader resident engagement, there is a visible change in the culture of discussion and education about the functioning of administration of local self-government and participation itself. Based on this, it can be concluded that the participatory approach is becoming increasingly common and better understood by a wider group of participants. In this case according to Fung (2006) actions based on structure of public participation can enhance the legitimacy, justice, and effectiveness of governance.

The LPB as an intersection between the social and cultural environment of governance and administrative efficiency, supports Lehtonen's (2022) assertion that this mechanism enhances citizens' understanding of the tasks performed by city organizations, helps them learn to engage in public discussions and formulate reasoned arguments, and contributes to the strengthening of social cohesion.

The LPB plays a key role in building civil society and involving residents in decisions on the spending of public funds. Despite its volatility, this process is very popular, with more than six million votes cast in eleven editions. Data and statements confirm that local and territorial factors and formal changes impact LPB the most. These changes, enshrined in City Council resolutions, affect its operation. Additionally, they are reinforced by local informal factors, such as the dominance of project groups that mobilize activists and influence local media and authorities, thereby accelerating rule changes.

Research conducted by Kociuba and Bielecka (2021) on the impact of amendments to The Act on Local Self-Government (1990) on participatory budgets identified cities that are leaders in this area. They confirmed that Lodz is one of the key cities introducing PB in Polish local governments, and from this perspective, it can be a valuable case study. This was also confirmed in a study by Brol and Derlukiewicz (2023), who found that Lodz has the highest percentage of funds allocated *per capita*, the highest number of submitted projects *per capita*, and the highest voter turnout among the most prominent Polish cities included in the study.

Martela's (2021) study on the influence of interest groups on voting results in Poland revealed a noticeable percentage of projects for institutional projects each year. Notably, educational institutions, libraries, cultural institutions and fire departments submitted the highest number of applications. This study of the LPB corroborates these results, confirming the dominant role of educational institutions as key actors in local government PB projects in 2020 (Brol & Derlukiewicz, 2023). The study also confirms the thesis that the influence of interest groups changes between editions in response to a change in the rules at that time. Evidence from the study also supports the validity of the hypothesis that formal institutional factors influence changes in PB performance.

The research also revealed the dominance of projects submitted by key municipal organizations (particularly educational and health institutions), which utilized their informational and institutional advantages (e.g., knowledge of PB deadlines and procedures, and access to potential voters). However, this dominance can be effectively reduced by making changes to formal institutional factors at the local level. However, local key players remain susceptible to misusing PB due to the availability of many people using their services. Contrary to expectations, this study did not find that PB projects come rarely from people who previously had nothing to do with participatory budgeting. In the case of the LPB, both regular leaders and newcomers are visible and active each year, as evidenced by the findings from the interviews.

The research also highlights the role of local leaders who engage residents, further contributing to changes in PB functioning in Polish local governments. These leaders mobilize through local activism, creating visible pressure for targeted changes to key principles. The involvement of grassroots movements and media further demonstrates the democratization of the process. These activities impact the formal nature of local changes (when authorities decide to make rule changes nationwide). Sometimes, the discussion on the future of PB (especially regarding the largest Polish cities, where the capacities of local leaders are most noticeable) extends beyond individual local governments. Then, it may trigger broader changes that subsequently affect the local level, such as through nationwide legislative changes.

CONCLUSIONS

Despite positive developments, the PB process faces challenges and criticism, especially regarding the impact of institutions on its operation. The biggest challenges include responding quickly to changes, protecting against self-serving leaders, and effectively implementing selected projects. Educating stakeholders from an early age and discussing the PB philosophy at the national level are also important.

This research has its limitations. The quantitative part was constrained by the data collection methodology, while the qualitative part presented perspectives from selected groups (leaders and experts) that may not always align with the perspective of other actors in the process, such as the voters themselves. Although the results from Lodz as a nationally representative case study can be generalized somewhat, further research in other locations is advisable. Additionally, monitoring subsequent editions of the LPB will help better understand the observed changes. Nevertheless, public participation can help build trust between authorities and the public, promoting sustainable urban development and activating local communities.

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