
The Analysis of Cultural Heritage Assets as a Potential for Local Development: Study of the Academic Environment

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Abstract:

Purpose: The subject of the paper is to determine the views of academic community in their attitude to cultural heritage and to reflect the results to chosen economic theories in order to enrich the development policy within EU regions.

Design/Methodology/Approach: The authors designed the following focus study to determine the views of academic community on economic theories reflected in their attitude to cultural heritage.

Findings: The proposed methodology let us to find out the need of redefining the role of cultural heritage assets in the sustainable development of regions.

Practical Implications: The new approach to the regional cultural policy has been proposed. The findings have been used to construct the regional policy directives within 2027 perspective.

Originality/Value: According to the authors, innovative character of needs identified based on cultural heritage may become a significant factor in stimulating the development of regional and supra-regional economies and should be discussed further.

Keywords: Emerging region, homo economicus, cultural heritage, academic community, 'easy rider' attitude.

JEL codes: B22, B41, D84, O38.

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1. Introduction

Tangible and non-tangible achievements of the past generations are the source of the heritage for their successors. However, successors' attitudes towards this legacy vary. Along with the concerns about its preservation, this legacy was also subjected to systematic and selective destruction. In order to promote regional diversity and its legacy the Council of Europe and the European Union have been initiating the European Heritage Days for 28 years. The authors of this initiative assumed that involving local communities into caring and protection is essential in preserving heritage successfully. They also recognized the need to provide reliable information about the value of this heritage through learning about the history of the place or monument (European Heritage Days, 2019). The initiative of this European project was taken mainly by state institutions established to protect cultural heritage. Plans and proposals for subsequent editions of this project are usually presented from the perspective of activities undertaken by the aforementioned institutions. This approach does not specify the benefits that individual recipient can gain from knowledge of the past and care for the preservation of its artifacts.

The authors of this study aimed to investigate the significance of cultural heritage from the perspective of individual needs. They attempted to determine whether and to what extent academic teachers, especially non-humanities, recognize personal benefits derived from cultural heritage and how they define the needs met by participation in cultural heritage. In other words, to what extent their behavior is driven by economic theories.

1.1 The Period of Developing Economic Theories

Based on historical knowledge gained while studying in Glasgow and Oxford, as well as on his own studies and thoughts on economy at that time, Adam Smith considered 'personal benefit' as the ultimate motive of the individual economic activity (Chodorowski 2002, pp. 62-63, 89). He claimed that "*Each individual is able to determine its purpose and method of its implementation*" and that "*Personal interest in business activity prevails over altruistic behavior, which does not mean that the individual activity is always selfish*" (Zagóra-Jonszta 2015, pp. 619-620). These assumptions and subsequent conclusions led to the development of the theory of liberalism, based on the individualistic concept of man. Liberalism posits individual freedom, especially in politics and economy (Kwaśnicki 2000, p. 8), as essential element for the development of *homo economicus*, that is, the man whose essence was to act "*....so as to receive the highest amount of things necessary, facilities and luxuries, with the least amount of work and self-denial, at which these goods can be obtained, in light of the existing level of knowledge*" (Jurek, Rybacki 2014, p. 66), unless it is governed by other motives.

'Other values' refer to the theories developed in German-speaking territories, where rather than formulating individualistic claims, the attention was paid to social needs,

fostering the national spirit. National wealth was defined as the spiritual potential inherent in traditions, culture and character of the nation that creates it (national school). Reference to cultural heritage played a significant role in creation of the nation. A well designed image of the past was used to shape the sense of national community. This allowed to design economic attitudes which supported the nation-forming processes in Central Europe. No research have been made on origin (collection) of funds³ necessary to search for factors which integrate society, which lost the sense of group identity.

The collapse of the late feudal system at the turn of the 18th and 19th centuries was associated with the lack of such group identity (Hroch 2015, p. 9). Interest in the past was initiated by the intellectual and scientific community. Cultural codes were developed based on recollections of lost rights, ongoing war campaigns and battles (Hroch 2015, pp. 12, 15). It encouraged society to work on restoring state structures. This initiative was started by academic community (Hroch 2012, pp. 18-19, 158).

1.2 Changes in Economic Concepts in Central Europe

After regaining full independence in the 1990s, efforts to promote historical knowledge in the social consciousness were less popular than in totalitarian times when historical knowledge was a form of opposition to the state's vision of the past. After the change of political system pragmatism became a driving force for the society, which entered the path of economic liberalism. Exploring past for the sake of knowledge, especially presenting its complexity, was less compelling (Gawrecki 2014, p. 149) than achieving a specific purpose, especially when economically beneficial. Political changes and the transition to market economy reduced cultural heritage to cost-generating assets (Kubiszewska 2014, p. 165). The lack of recognition of the significant benefits of historical knowledge was reflected in the tendency to reduce the amount of historical education in curricula, as well as the absence of students interested in historical studies (Gawrecki 2014, p. 149). On the other hand, initiatives which aimed at transforming passive recipients into active participants re-creating past events also developed.

In the 21st century, the spread of endogenous models of economic growth stimulated the interest in local resources. The research showed various aspects of managing the potential developed on cultural heritage. Advantages of cultural heritage were perceived from the perspective of place marketing, economic concepts of public goods, sustainable urban development (Lillevold and Haarstad 2019, pp. 329-341), urban regeneration (Papadam, 2017), tourism economics (Lyon and Wells 2012, pp. 243-245), or creative industries. Cultural heritage was seen as a product, which could be offered to a buyer. Therefore, the activities of public cultural institutions, local and regional authorities, heritage owners managing their real estate, and non-

³*In Prussia, the Poles collected the 'national treasure'. However, there is no reference to this problem in Polish historiography.*

governmental institutions that were established to protect or popularize cultural heritage were discussed (Murzyn-Kupisz 2012a, pp. 243-245).

Research on perspective of an individual recipient remained unrecognized. According to one of Adam Smith's theories, human behavior is stimulated by "*selfish interest*". In a contemporary sense "*selfish interest*" can be considered as "*individual needs*". No research was found to determine the needs of the individual recipient which would be satisfied by participating in cultural heritage. The problem of what "*selfish interest*" inspires consumers to be interested in cultural heritage has not been discussed.

2. Materials and Methods

This qualitative research was preceded by a source examination of the relationship between economic theories and understanding as well as identifying individual needs. Simultaneously, authors analyzed studies, which presented contemporary economic tendencies related to cultural heritage. Thereafter, authors carried out the survey addressed to the academic community, located in a medium-sized research center in one of the southern Polish provinces with interrupted historical continuity. The survey consisted of open-ended questions to avoid suggesting answers to respondents.

Many attempts have been made to define cultural heritage. In 1871, Edward Tylor described this term as "*the totality of material and non-material human creations, meeting specific normative criteria including knowledge, art, beliefs, morality, law, customs and all other abilities and habits acquired by man as a member of the community*". According to the modern approach defined in 2014 by Tomasz Homa (2014, p. 35), cultural heritage was considered as "*...the collective achievements of generations of a given community in terms of its intangible and material culture, shared by this community and passed on to future generations on the path of education and socialization...*". In 2002, Massimo Mazzanti noted a shift in perception of cultural heritage towards taking into account the economic benefits that its conscious use can bring (Góral 2014, pp. 529-558).

Firstly defining the economic "*need*" as a sense of lack of good which shapes consumer preferences and tastes (Malik 2016, p. 15) the authors referred to attitudes related to the so-called "*selective emergency*", when the consumer is more sensitive to the perception of a particular category of stimuli. Meeting the need is necessary for the functioning and development of the individual and is expressed in various activities towards the implementation of intentions, tasks and plans. Areas with interrupted historical continuity may be defined as areas where after the World War II, German inhabitants were displaced and replaced by people from other places.

Until 1990s and the transformation of political system German heritage was rejected especially by new residents (Ossowski 1966, pp. 81-82). After entering the

capitalist path, particularly after Poland joined the European Union, multicultural perspective was appreciated. (Kieniewicz 2002, p. 91). For two decades, this tendency has been replacing earlier attitude.

2.1 Needs Met by Participation in Cultural Heritage: Assumptions

According to Mirosław Hroch, since the 19th century representatives of academia inspired members of ethnic communities (dominated, non-governing) to codify language, enhance national awareness and gain independence by referring to the past, myths, memorials, and cultural traditions that were part of the “*cultural heritage*” (Hroch 2012, pp. 18-19, 158). This idea adopted by the members of the academic community, regardless of education and material status, as a determinant of individual and collective actions became popular in the 1920s and 1990s. After over 25 years since the last political changes in Central and Eastern Europe, the authors of this study examined how the needs of participation in cultural heritage are perceived by contemporary members of academic community in the country, which adopted the capitalist system 30 years ago.

The survey contained six open questions related to the definition of heritage, participation in cultural heritage, and forms of this participation. The last question aimed at determining the needs satisfied by participation in cultural heritage and the amount of financial means used to meet these needs in the present and willingness to use them in the future. Respondents were asked to share the first association that came to mind after reading the questions. The survey was conducted from January through March 2020. It was addressed to representatives of academia due to the role academics previously played in determining the significance of cultural heritage in enhancing national identity of European nations.

2.2 Study Group

The questionnaire was addressed to 120 people of various scientific status. One-half of the respondents were females. 39 (32.5%) survey questionnaires were completed. The number of completed questionnaires indicated little interest in this problem. Among the respondents, 18 (46.1%) were females and 21 (53.9%) were males. The average age of respondents was 65.3 years for females and 56.1 years for males⁴. The average age of respondents indicated that the vast majority of them were influenced by political transformation and the implementation of liberalism. Respondents represented a wide range of research degrees: 10 people (25.6%) were independent researchers (Professor or Doctor habilitatus), 16 (41.0%) – PhDs, and 9 (23.1%) – MAs.

The majority of male respondents were professors (7 people – 17.9%), and the majority of female participants were MAs (5 people – 12.8%). Independent

⁴ 4 persons (2 females and 2 males) did not specify age.

researchers were represented by 8 participants, in both sexes equally. The majority of respondents lived in cities (32 people – 84.2%), mostly with over 100,000 inhabitants. Respondents represented various scientific disciplines.

Table 1. Number and average age of respondents (in years) by gender and research degree

No.	scientific status	Sex						Average age		
		female		male		total		female	male (in years)	total
		number	%	number	%	number	%			
1.	MA	5	12.8	4	10.3	9	23.1	52.2 ^x	49.0	50.6
2.	PhD/MSc PhD	8	20.5	8	20.6	16	41.0	45.0 ^x	44.0	44.5
3.	Associate Prof./Prof.	3	7.7	7	17.9	10	25.6	65.3	56.1 ^{xx}	60.7
4.	No data	2	5.1	2	5.1	4	10.3			
5.	In all	18	46.1	21	53.9	39	100.0			

Note: ^x – 1 person did not specify age.

Source: Own calculations based on completed questionnaires.

Table 2. Scientific disciplines represented by respondents. Number and percentage of respondents by research degree

No.	scientific disciplines	Research degree			Total number	% in total
		professor	PhD	MA		
1.	Social sciences	3	6	5	14	35.9
2.	Engineering sciences	1	1	1	3	7.7
3.	Management sciences	1	2	-	3	7.7
4.	Humanities	7	7	6	20	48.7
5.	Persons in total	12	15	12	39	100.0
6.	% in total	30.8	38.4	30.8		

Source: Own calculations based on completed questionnaires.

Representatives of technical and management sciences were the least represented group (3 people – 7.7%). Almost one-half of participants represented humanities (20 people – 48.7%), and over 1/3 of respondents represented social sciences (14 people – 35.9%). Historians predominated among humanists (4 persons – 66.7%), and in social sciences the most numerous group of participants was related to economics, finance and management (6 persons – 66.7%).

3. Results

In terms of personal attitude to ‘cultural heritage’ (and answer to the question ‘How do you define cultural heritage?’) representatives of social sciences attempted to define this term substantively either with lapidary statements “*all phenomena and*

behaviors showing culture, tradition, religion, relationship with ancestors or place of birth/residence” (female, PhD, 43, economist) or more detailed explanation. The concept of cultural heritage was also described as [m]ental legacy (religion, family traditions, ways of reacting and behavior passed down from generation to generation, national cultural traditions cultivating the memory of historical deeds) and material legacy (taking care for buildings from the past, art works and thought passed down, etc.).

Our past with all benefits of the inventory (female, MA, age 62, economics), or this is the output (of what was created in tangible and non-tangible form) of a given society, nation, world in terms of for example art (e.g., paintings, sculptures, jewelry), literature, architecture, music and singing, theater, film, writing (male, PhD, age 50, political sciences and administration). Cultural heritage was also associated with national identity (female, MA, 63, economics). For some respondents, it was an inherent element of national identity *“it is an answer to questions about our roots, ancestors’ achievements, common history and culture”* (male, professor, 55, economics and finance). It was also suggested that *“...what has been achieved so far is no less important than the need to adapt to the changing world...getting organized within local communities”* (male, nominal professor, 63, technical studies).

For the representative of humanities *“cultural heritage is a set of all cultural goods, attitudes, behaviors, and testimonies handed down by past generations...”* (female, PhD, age 61, literature). One participant highlighted its economic aspects *“cultural heritage impacts regional development and distinctiveness. It includes tangible (substantial evidence of the past and creations of nature) and intangible (tradition, oral and written records, knowledge and skills) heritage”* (male, Prof, age 62, theology). Other participant associated this term with a *“value system that sets out the moral principles of my conduct”* (female, PhD, age 46, history). The majority of respondents confirmed their participation in cultural heritage. Only one participant claimed otherwise (female, MA, 63, economics).

According to the representative of humanities it is impossible not to participate in cultural heritage. He claimed that *“it is impossible not to participate in heritage, because we live in a reality shaped by specific communities (family, nation, local environment, professional group, etc.) to which we belong and identify with”* (male, PhD, age 47, history). The intensity of declared activity did not vary significantly by sex; 51.8% of women and 48.2% of men participated in various forms of cultural heritage. Among professors and doctors the intensity of participating in cultural heritage was declared at a similar level. In the case of masters, women showed a greater diversity (68.8%). Participants provided various examples of using cultural heritage. Reading books (17.4%) and visiting museums (15.5%) was indicated by the largest group of participants. 10 people drew attention to the cultivation of family, parish, and local traditions.

Among this group three respondents were independent employees in humanities and five of them were doctors representing humanities and social sciences. Two of them represented economics (male, professor, age 47 and female, PhD, age 43), the other were representatives of the humanities (female, PhD, age 40, educator and two males; PhD, age 47 and MA, age 32, historian). In addition, seven people (including two representatives of economics) declared to attend theatrical performances. Professors of economics (male, age 55), history (female, age 70) and theology (male, age 63) suggested the use of cultural heritage in their professional work. The educational aspects of heritage were used in professional work of an educator (PhD, age 40), as well as a historian (PhD, age 47) as well as in family life of two economists (two persons, both PhD, both age 46). The purchase of locally made products was also recognized as participation in cultural heritage (female, PhD, age 43, economics).

4. Discussion and Recommendations

In terms of the needs met by cultural heritage, spiritual needs were indicated by two PhDs representing politics and administration (male, age 50, and female, age 46), one representative of pedagogy (female, PhD, age 40) and an historian (male, MA, age 32). Most respondents combined spiritual needs with educational and aesthetic needs (female, age 46, political and administrative sciences) or with a sense of belonging and engagement (male, MA, age 32, history). One person pointed to 'entertainment' needs, the representative of economics indicated the need for self-actualisation (DSc., age 36), and the representative of technical sciences justified participation in cultural heritage by claiming that it would satisfy the need of "leaving a positive mark for future generations" (male, Prof., age 70). The historian also raised intellectual issues (Prof., age 70). Aesthetic aspects were mentioned by 4 people, representing both social sciences (female, PhD., age 46, political and administrative sciences and male, Prof., age 49, economics) and humanities (male, PhD, age 47, history) and M., Prof., age 50).

Among other important needs participants also mentioned "*bond with ancestors*" (female, MA, age 62, economics), "*understanding of historical continuity and history of Poland*" (male, Prof., age 70, technical sciences), reoccurring need for a sense of "*national identity*" (female, PhD, age 61, literature studies), "*social identity, sense of group membership and security*" (male, PhD, age 47, history), "*relationship of my family to the country and local community*" (female, PhD, age 43, economics), "*answers to questions about human identity and history*" (male, DSc, 36, economics).

It should be noted that the first 10 indicated manifestations of heritage are public goods that may be complementary (Table 3). This indicate that it is possible and reasonable to integrate cultural heritage products and services based on these needs in a local and supra-local dimension.

Table 3. *Preferable cultural heritage goods (according to respondents)*

No.	Forms of participation in cultural heritage	All	
		In total	%
1	reading books	19	16.2
2	visiting museums	17	14.5
3	sightseeing	9	7.6
4	attending theatrical preferences	9	7.6
5	cultivating local traditions	8	6.7
6	visiting exhibitions and art galleries	7	6.0
7	attending concerts (philharmonics, opera, festivals),	7	6.0
8	cultivating family customs and rites	6	5.1
9	watching films	5	4.2
10	listening to music (classical)	4	3.4
11	use of scientific achievements	3	2.7
12	visiting landscape parks	2	1.7
13	raising children	2	1.7
14	sensitizing children to cultural values	1	0.9
15	telling family and local stories to children	1	0.9
16	transmission of ethical and moral principles	1	0.9
17	buying local products	1	0.9
18	reconstructing historical events	1	0.9
19	using the Internet	1	0.9
20	using everyday objects inherited from ancestors (e.g. guides, cookbooks, furniture)	1	0.9
21	using human products	1	0.9
22	traveling	1	0.9
23	manifestations of tangible and intangible culture	1	0.9
24	collecting tangible artistic and craft achievements	1	0.9
25	speaking Polish	1	0.9
	In total	117	100.0

Source: *Own calculations based on completed questionnaires.*

The spectrum of indicated needs most significantly covered the need for “identity” at family, local, social and national levels. This need was pointed out by representatives of both sexes and all scientific disciplines, especially among people aged between 36 and 70. The most of pointed forms of cultural heritage goods are in line with many ways of active ageing (Thalassinos, Cristea, and Noja, 2019). The incidence of such answer underlies the assumptions of national economy. According to the Maslow’s hierarchy of needs, respondents listed the needs related to self-fulfillment, especially cognitive needs (knowledge and understanding), sense of belonging, and to a small degree – security.

4.1 The Amount of Individual Expenses

For the significant number of respondents (23.5%) it was difficult to determine the level of private financial expenses allocated to participate in cultural heritage.

According to one respondent “*The use of heritage does not require any funds. In their absence, we are not deprived of the opportunity to share traditions (e.g. the stages of education, use of libraries, participating in meetings, lectures, openings, cultivating habits, making handicrafts, cultivating historical memory)*” (female, PhD, age 61, literature studies). Some respondents pointed to endowments provided by employer, non-cash settlements (male, PhD, age 38, IT) or use of free museum entries (male, MA, age 32, history).

Among those, who determined the level of expenditure, respondents indicated 20000 PLN of own funds allocated for publishing the book (male, Prof., age 62, theology). Among PhDs, the declared amount ranged from PLN 1200 per year (female, age 61, literature) to PLN 10000 per year (male, PhD, age 36, economics). When converting these values into a percentage of annual incomes, these amounts ranged between 2.6% and 21%. Among Professors, expenses amounted to 8% of annual income (male, Prof., age 70, technical sciences).

When asked about the amount of expenditure on future participation in heritage, almost one-half of the respondents (46.1%) did not determine the level of participation in cultural heritage. Among the other half, declared expenses ranged from PLN 101-200 PLN (10.2%) to 20% of the annual income (7.6% of respondents). Only one person declared to allocate “1% of PIT tax to sustain and disseminate our cultural heritage” (male, Prof., age 55, economics and finance).

4.2 Change of Evaluation Method

Due to respondents’ reluctance to determine the real and anticipated expenditure allocated to participation in cultural heritage, it seems justified to change the measurement method to assess the significance of cultural heritage. Perhaps the evaluation should not be based on financial values, but as David Ricardo suggested, on the time spent on acquiring specific knowledge and creating desired objects.

However, this approach requires recognizing that time is irreproducible. One will not invest time in activities which will not result in fulfilling his own needs. The manifestations of the contemporary tangible cultural heritage served their purpose when they were created: strongholds were made to defend against armed invasions, mansions served to satisfy utilitarian and representative needs, etc.

Nowadays, most of these manifestations lost their primary meaning because both fighting methods and social requirements changed. Society may remain detached from such manifestations unless they are considered worthy of time and effort, especially, when it is faced with other more attractive or mercantilist subjects of interest. Therefore, it is necessary to investigate whether those, who are involved in identification (knowledge) of cultural heritage *per se*, are marginalized (e.g. by decreased wages).

4.3 Time as a Measure of Interest

Among respondents who were asked about the amount of time spent on learning about cultural heritage, 38.5% of them were unable to determine how many hours they spend on satisfying needs related to these interests. The largest group of respondents (46.1%) spent 1-5 hours per week. They were mostly males. PhDs (46.1%) of both sexes were the ones most interested in cultural heritage. Particularly, lawyers were able to specify the number of hours spent on this activity. Representatives of other disciplines did not demonstrate similar disposition. This may be caused by the lack of prior reflection regarding the role of cultural heritage in one's functioning.

5. Conclusion

All respondents underwent the process of socialization during the formation of the capitalist system in Poland. All of them recognized the cognitive and aesthetic benefits of participating in cultural heritage, but they were not willing to increase their participation in maintaining it. The declared attitudes indicate the transfer of responsibility for the preservation of heritage to external factors. This attitude characterizes the period of economic growth. Period of regression usually encourage return to the values related to cultural heritage. This was pointed out by Robert Alwyn Petrie Hewison in the book entitled *The Heritage Industry: Britain in a Climate of Decline*. According to Hewison "that growing nostalgia for the past", increased interest and a specific "recognition" of heritage in Great Britain in the second half of the 20th century was directly related with a sense of lack of perspectives, an atmosphere of stagnation and stagnation in this country. He claimed that "...unable to look into the future, the Brits look into the past" (Murzyn-Kupisz 2012b, p. 13). Francis Fukuyama also suggested the increasing importance of identity in making individual economic decisions (2019, pp. 201-224). In terms of this study, activity related to cultural heritage may be associated with national economy, however, individual choices seem to be liberal.

From the economic point of view beneficial aspects of cultural heritage are defined as public goods of a regional (local) character, that are both non-excludable and non-rivalrous (Holcombe 1997). However, some forms of heritage may become club goods. When those, who benefit from public goods, do not pay for them the problem of free rider (*easy rider*) occurs. Additional macroeconomic (social) costs generated by this problem reduce prosperity and growth rate. The solution to the *easy riding* problem requires the intervention of local (regional, supra-regional) authorities by imposing institutional order where market mechanism fails (*market failures*) (Malik and Ciesielska, 2011). The more communities use certain forms of heritage, the more significant increase in number of free riders. This disturbs macroeconomic balance defined by Nash and Cournot. In terms of public goods, the behavior of market players always leads to inefficient allocation defined by Nash. In 1984, R. Cornes and T. Sandler (1984, pp. 580-598) conducted an interesting research in

terms of cognitive and practical aspects of cultural heritage. They proved that in case of complementary public goods (that is, most forms of cultural heritage), the scale and extent of the *easy / free riding* phenomenon decrease. The authors of this study believe that this allows to formulate specific recommendations for state policy in managing cultural heritage:

- It is worth to monopolize the access to cultural heritage goods with the state monopoly, above all to these cultural goods with various degrees of substitutability.
- It is worth developing the networking of various heritage assets, strengthening their complementarity (e.g. an integrated cultural heritage tourism product).
- In regards to complementary goods of cultural heritage, state monopolization (regulation) of their use is not economically justified. However, it is economically reasonable to market the use of cultural heritage assets.

The theoretical premises for implementing market solutions in this area are related to the Pareto's allocation optimum⁵ and so-called Coase's theorem⁶. Therefore, in order to add value to the individual use of cultural heritage, consumers should be made aware of the needs, benefits and values, enhanced by their tangible participation in the discussed resources.

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⁵*Vilfredo Pareto (1848-1923), Italian economist, representative of Lausanne school (together with Leon Walras).*

⁶*Ronald H. Coase – economist at the University of Chicago, Nobel laureate in economics in 1991 for pointing out the role of social costs in the theory of microeconomics.*

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