

*Iwona Sagan\**

## **CONTEMPORARY REGIONAL STUDIES – THEORY, METHODOLOGY AND PRACTICE<sup>1</sup>**

The paper offers a review of the evolution in defining and describing regions, showing mutual relationships between particular approaches and logical succession between various analytical concepts of the region. The analysis highlights the strong relationship between individual theories and overall social change. Three main approaches to regional research are outlined: the chorological approach, Regional Science and contemporary social and cultural interpretations of the region. Each approach is presented in three perspectives: theoretical, methodological and practical. The changing role and status of geographical research in regional studies is also discussed.

### **1. Theory**

Over the past decade, interest in regional studies and in economic development of regions, which became key players in a knowledge and service based economy, has continually increased. This ‘rediscovery’ of the regions has had profound implications for both national and European socio-economic policies. For instance, the European Union promotes a decentralisation policy aimed at strengthening regional economies through increased productivity and innovation. Another consequence of a revived interest in regions is rapid development of regional studies and research focusing on the conceptualisation of the region and related concepts on the one hand, and on the other – on looking for methodologies and approaches which would be most suitable for the description and explanation of regional phenomena.

In order to outline and evaluate the contemporary situation of regional studies, we should look at their dependency on a broad socio-economic context and also at their evolutionary character. An attempt at presenting the evolution in the definition and description of regions points to the logical links and succession between subsequent analytical concepts of the region, which can be seen as a proof of continuity and evolutionary development of ideas and concepts concerning the region rather than revolutionary contradictions in its individual stages.

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\* Iwona Sagan is professor at the University of Gdansk, Faculty of Geography.

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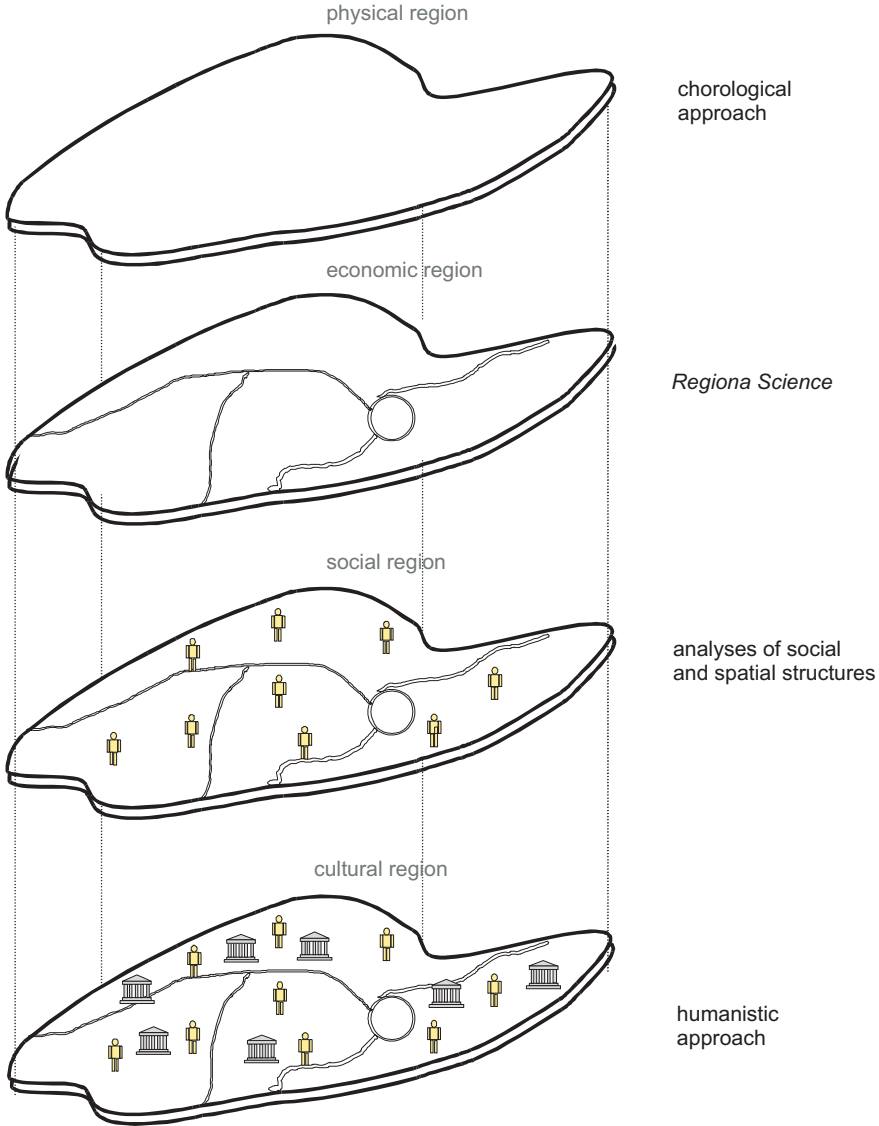


Figure 1. Region as a superstructure for natural and social systems

Source: Sagan, 2003, p. 52.

A schematic diagram of the major changes in the approaches to the concept of the region is shown in Figure 1. The graphic representation of the diversity of the region's definitions only symbolically pushes it into specific linear boundaries. Problems related to regional delimitation, to the character of the region's boundaries – whether they are definite or vague, the issue of the centre-periphery relationship represent separate areas of research which should be discussed in a broad context. Therefore an attempt to trace the changes in

the approaches to formulating the concept of the region has to focus only on those features which, in a given period, were regarded as the crucial ones for explaining and understanding the diversity of the regional world.

In the chorological approach, which was widespread in science at the turn of the 19<sup>th</sup> century and in the first half of the 20<sup>th</sup> century, researchers looked for regional distinctions and peculiarities rather than set out to formulate general concepts and all-encompassing theories. The physical and geographical differences between regions both determined and differentiated the organisation of business activity and social lifestyles while regional delimitation was based on the environmental barriers and boundaries of physiogeographic units.

Such an approach to the concept of the region gave rise to some criticism in the 1960s, when the neo-positivistic methodology was adopted as not only dominant but preferable in scientific research. It was commonly agreed that the region as it had been conceived until then, being strongly rooted in its environment, was an 18<sup>th</sup> century concept which perished along with the Industrial Revolution.

The concept of the region was subordinated to the concept of space. The major trends in the socio-economic changes that took place in the 20<sup>th</sup> century were intended to produce similar lifestyles regardless of the inherent nature and characteristics of particular regions. This was made easier by the technological revolution in the means of transport and communication, the emergence of a global system of market economy, the acceleration of urbanisation processes propelled by an increasing industrialisation of business activity, the centralisation of management and decision making processes and the application of scientific rationality rules in social and economic planning. All these tendencies led to an obliteration of differences between individual regions. In the era of modernity, regional studies dealt with investigating processes, systems and structures which would emerge, transform and vanish in a uniform, undifferentiated space. In an isomorphic space, patterns of human activities were fashioned on the basis of earlier models. The region was but a sum of the effects of operation of general laws.

Regional studies were dominated by Regional Science, a discipline which combined economic, geographic and planning approaches and focused on theoretical and quantitative analysis of regional economy issues. Regional Science, which was practically created by one man, an American economist, Walter Isard, in the 1950s, mainly addressed such issues as the development of quantitative empirical models and purely theoretical analyses of location processes and regional economy. The most frequently tackled issues in the sphere of regional studies included system analyses within regional economy (input-output models), analyses of industrial complexes and of spatial interactions described through gravitation models, as well as many statistical studies on the application of the Central Place Theory.

Regional Science provided an approach to regional studies in a situation when the traditional descriptive method, prevailing in science at that time, was

being replaced by scientific methodology. The chorological approach used in regional studies did not quite meet the required standards of scientific objectivity, while the basic concepts of the specific place and region stood in contradiction to scientifically formulated categories. Chorological studies suffered from the lack of theory and laws. The regional approach was criticised as descriptive, subjective and atheoretical, and hence unscientific (cf. Hagget 1965, Harvey 1969).

There were other factors than the new methodological requirements, which led to restricting regional research mainly to spatial analysis of economic phenomena and processes. The tendencies in socio-economic transformations of the modernist era strengthened the belief that the reasons for the existing regional disparities in the world should be sought only in the economic development, especially in the technological advancement of the world's particular areas. The traditional society was founded on agriculture, which was more strongly linked with the properties of the natural environment than industry, the cornerstone of economy in modern societies. Physiogeographic regions were therefore more distinctly present in the pre-modern economic differentiation of the world, while modern societies seemed to operate in isolation from the regional features of the natural environment.

The criticism of quantitative and neo-positivistic regional studies, which was on the increase since mid-1970s, led to some revision in methodological approaches, and, in the longer term, to changes in the understanding of regions and ways of describing them.

Works by Sayer (1989; 1991) exerted a considerable influence on new methodological approaches to regional research. He claimed that nomothetic approaches adopted by Regional Science, and idiographic ones, characteristic of traditional, chorological regional geography, were not mutually contradictory but rather formed two opposite poles of the same continuum. Abstract models of social and economic structures which were popular in the Regional Science-inspired approach cannot be perceived as generalisations that are independent in terms of time and space. If certain structures are widely disseminated, this should only be seen as a proof that the spatial and temporal dimensions which are encoded in them correspond to a broad spectrum of both spatial and temporal contexts. In other words, such structures reflect specific geographical and historical circumstances and conditions. Somewhere in the middle of the continuum axis there will be some cases whose structures are in the making or are being transformed. Hence the general studies and specific examples; nomothetic and idiographic studies should therefore enter into a much more constructive dialogue than has been the case so far as regards theoretical and applied trends in regional research (Sagan 1996).

The stimulus for methodological re-evaluation referred to above came from the need to validate regional research in view of a growing hiatus between the directions of theoretical interpretation and actual transformations of the world. Continuing economic development, with its dynamics and expansion, which

was increasingly assuming the features of a global economy, apparently failed to remove disparities between regions. Technological progress and successive phases of industrialisation did not turn out to be a variable which would convincingly explain the deepening and substantial differences between the world's regions. More and more frequently a new issue was raised, which was the focus of interest of the so-called new regional geography – the impact of the nature and intensity of social relations on regional diversity. Although industry is indeed much less dependent on the features of the natural environment than agriculture, the modernist belief in the possibility to standardise the world's economy proved mistaken. Differences in industrial organisation stemming from cultural and social structure diversity decide which regions will prosper and which will not, and what development dynamics and directions of development they will have (cf. Hampden-Turner, Trompenaars 1998). Paradoxically, the process of economic globalisation, which considerably contributed to the weakening or even the disappearance of state 'shells' which tended to isolate the national economies, has revealed the underlying deep regional disparities between individual territories.

Therefore the currently emerging image of global economy does not refer to state systems, despite their domination in the entire modernist era as privileged administrative and economic entities. Regions remain the basic units in the territorial economic mosaic of the world. Porter (2003) stated that the level of analyses dealing with economic development should be changed from the currently dominant national level to the regional one, owing to irrefutable evidence of glaring discrepancies in the economic development of particular regions within one country. Therefore, when we look at the condition of the economy at a state level, we move in a dimension of arithmetical means, which – in the case of huge regional disparities – do not offer a realistic picture of the situation, but tend to obliterate it. The voivodship (province) of Mazowieckie can serve as an example of such dependencies at the level of the administrative region. The voivodship comprises two territorial units with utterly different economies: the metropolitan area of Warsaw with the country's wealthiest municipalities, and its surrounding districts, with many municipalities which are among the country's poorest (cf. Gorzelak 2001). As we can see, statistics compiled at the voivodship level do not provide us with information that would make it possible to estimate accurately the actual condition of the region's economy.

Contemporary regional research indicates that it is much easier to explain regional disparities which are so difficult to overcome, as well as their poverty or economic wealth by the characteristics of their communities and analysis of cultural factors determining their development rather than purely economic parameters. Pred (1984) expressed the opinion that regions are formed in a historic sequence of events, resulting from a unique nature of social relations characterising a given region, and that such relations are in turn replicated within a given region. Regions are formed and developed as a result of

a regional social interaction, which is at the same time both a precondition and a result of social relations between individuals, groups and institutions occurring in a specific fragment of space. This dialectic process – of the regional conditioning of social relations and the impact of the community on the shaping of a region – leads to the emergence of an internally homogenous system of consistent concepts and activities which help distinguish one region from another.

The social context of relations is also becoming the basis for the interpretation of the region's economic development. In his book on the 'regional world', Storper (1997) looked at economy as 'relations', at economic processes – as 'conversation and coordination', and at business entities – as individual and collective 'self-reflecting actors' (p. 28). The criticism of the classical model of Regional Science produced a socially involved approach also in this theory. It refers to regional policy based on a system of social values (Chojnicki 1999, pp. 401–415). On the basis of the region's social interpretations, there appear concepts of an operational definition of the region based on the measurement of the intensity of interpersonal contacts between its inhabitants (cf. Wilczyński 1997).

Therefore, the region is not only a social, but also a cultural category. It is the system of beliefs, values and meanings of a given community that shapes both institutional and social relations. In other words, culture has a decisive influence on the nature of institutions which have been formed through social initiative and which foster the development of various regional systems. On the other hand, the peculiar nature of such systems affects the directions of cultural change. Thus, what has been a result becomes a reason for further changes, ultimately leading to a split in the development paths of individual regions (cf. North 1990)

Nowadays, the tenet that culture does matter and that it determines the course of economic development is practically undisputed. Landes (2003) admitted that Max Weber was right in saying that the cultural formation shaped by Protestantism contributed much more to the rise of contemporary capitalism than the level of wealth and technological development of societies.

The unique, distinct nature and close-knit nature of regions stem from a common sense of cultural community shared by their inhabitants. Local cultures are increasingly becoming the key to the explanation of problems occurring on the national or even the global scale. In this context, regional identification becomes one of the main research problems. This is the origin and rationale for so many studies on regional identity and attempts to isolate its constituents, to find out how it can be shaped. Another topic of interest is the attitude of young people because this (and not the degree of regional confinement of economic processes) will be the factor determining the future of the regions and their further existence. The cultural understanding of the concept of the region can help to find a connection between the relatively objective world of social and economic relations and the subjective reality of cultural identification.

A cultural region fuses individual aspects of the regional character which are regarded as essential in the identification of a physiogeographic, economic or social region. Its singularity results from different environmental, historic and economic conditions in which specific communities have evolved. This fusion of the environment, community and economy is even more noticeable in the concept of the place, which is convergent with a cultural interpretation of the region. This is resonant of the idea of Vidali's *milieu*, representing an inseparable entirety of nature, man and man's economy. Therefore, we cannot explain the singular nature of a cultural region without referring to attributes of the natural environment, and thereby – to a physiogeographic region, to the character of economic relations which have historically evolved there, or to the intensity of its social relations. It can be said that subsequent theories of the region do not represent competitive analytical proposals but are mutually complementary and describe the regional reality from different perspectives.

A cultural understanding of the region and studies of regional identity and territorial identification are the focus of interest of humanistic research. This interest underpins the fact that the concept of the place has become one of the major categories in research (Buttimer 1979; Relph 1976; Tuan 1987). As Paasi (1991) pointed out, place is not a notion that can be reduced to a specific fragment of space. It is not merely an everyday living environment or an administrative unit. A place is a unique network of social and material, temporal and spatial relations and associated meanings, stemming from everyday experience. It is built up of subsequent episodes in an individual's life history, which always have a 'geographic' dimension: realistic, imagined or utopian.

The physical environment conditions play an important role in the process of the emergence of both the place and the region, while the natural environment conditions constitute the basis for the organisation of material production on the one hand, and on the other – serve as a manifestation of symbolic and aesthetic values in the form of *landscape*. Landscape is a material expression of the relations between man and the environment; of work and its specific location.

Just as the theories of the region and the place intermingle, it can be said that the role of individuals and communities in the creation of region is as ambiguous. For those researchers who take a structural view, the role of individual group members making up a regional community is insignificant. On the other hand, in humanistic interpretations individuals are perceived as the main actors in the process of regional formation. Tuan (1982) expressed the opinion that fragmentation of space or its integration in the form of regions is a result of the relation between individuals and the society; their awareness, a sense of autonomy and bond with other people.

This can give rise to doubts whether it is justified to treat the region in terms of a place; whether the scale of the region does not surpass that of a place. Place as a category cannot be investigated in isolation from a subjective contact with the environment by individuals or communities. Place does not have any concrete spatial dimension. It can be the space of a room, just as

a region, country or continent. To create a place, it is not sufficient to ensure a specific organisation of space which would furnish it with a definite internal structure, the level and character of economy, the level of containment of economic linkages and social relations. This, however, does not mean that all these features do not matter in the process of place making. For a place to appear, people must have an emotional attitude to a given fragment of space which has been developed in a specific way; they must be mentally familiarised with it, must accept it and have a subjective view concerning the nature of this space. One cannot speak about a place without people – just as there are no people without a place. It can be concluded therefore that when we experience regional identification of societies, we experience the region as a place.

## 2. Methodology

New concepts of the region, attempts to explore its nature in the social and cultural dimension and perception of the region as a location mean that new methods and ways of description have to be sought. Contemporary regional studies are characterised by a diversity of interpretation, which is so typical of the post-modernist scientific paradigm.

Contemporary regional studies not only seek to look for and describe regional peculiarities and distinctions – which was a characteristic feature of chorological approaches – but strive for an interpretation of the characteristic features of local environments in the context of their influence on general, global processes. New regional research therefore strives to define the relationships between the results of general processes and the specificity of the local conditions, which is the ultimate determinant of the nature and direction of development of a particular region. The difficulty of the task lies in the fact that two kinds of traps must be avoided. Firstly, the *singularity* of research; falling into this trap means we will once again be confined to describing ‘bays and capes’, using an approach where every region is an individualised and unique entity, and which precludes generalisations or comparisons. At the same time, any return to the neo-positivist tradition would be as unproductive, as it would entail rejecting all reflection on the unique character of a particular place, being an approach in which regions are nothing but an effect and a corroboration of the operation of general laws. This approach in turn sets another trap for us – that of *generalisation*. The real challenge is to find a middle-of-the-way vantage point, which would accommodate the impact of general processes on the character of a given region and which at the same time would both identify and recognize the significance of individual regional features and distinctions which add to form its ultimate character (Figure 2).

The problem of mutual relations between individual cases and universal laws in the contemporary philosophy of science is similarly approached by Toulmin (1990), who made an appeal to maintain the universal rules but focus again on case studies. The cognitive significance of individual case studies in social sciences was extensively discussed by Flyvbjerg (2001).



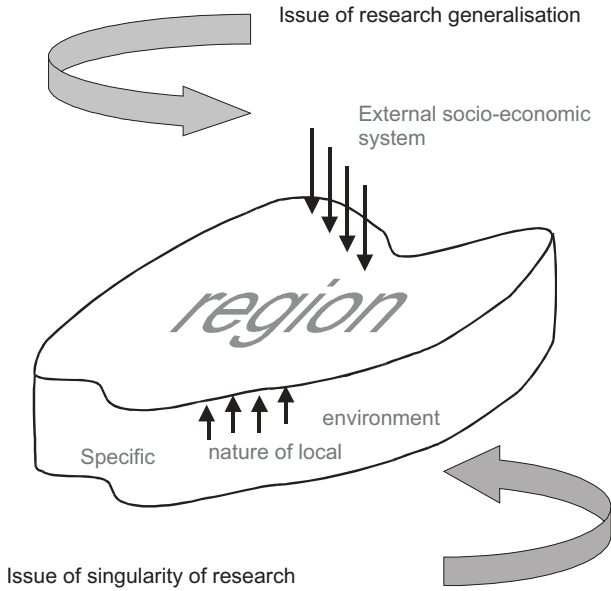


Figure 2. Region as a result of external impacts and influence of local factors  
 Source: Sagan, 2003, p. 47.

Being perceptive to the multi-dimensional nature of relationships and connections shaping the unique character of a region necessitates the use of a whole gamut of quantitative and qualitative methods rather than the application of any single methodological approach to analyse problems. This issue has been the source of many discussions and controversies between the followers of scientific analytical methods and those researchers for whom qualitative methods, including narrative descriptions, have a greater explanatory power. The scale and extent of this debate is best proved by the fact that the conflict between the advocates of both approaches materialised in the form of establishing two different regional research associations, which share the acronym but have different names (Figure 3).

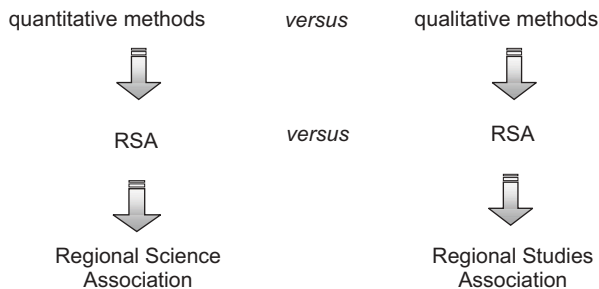


Figure 3. Regional research associations  
 Source: prepared by the author.

The Regional Studies Association was set up in 1965 in Great Britain in response to the criticism and disagreement of some regional researchers to an intense mathematisation and theorisation of regional studies, promoted by scientists who were members of the Regional Science Association, established in 1954 in the United States. Currently, both organisations are active in the sphere of regional research, often the main difference between them being the name rather than the applied methodologies. Today, nobody seems to question the need to combine and use both qualitative and quantitative methods of analysis in regional research. Quantitative and statistical methods should be used to describe the factors affecting regional development at the macro level and to analyse the external socio-economic system, because they help to process considerable amounts of data which can provide statistically comparable results. On the other hand, to explore and pinpoint the specific features of the local environment, it is often necessary to augment the picture obtained from an analysis of the statistical data with more detailed, problem-oriented data, using various qualitative techniques, as their results can open new possibilities for explaining the phenomena and their causal interpretation.

### 3. Practice

In the Polish literature on the subject, Dziewoński (1967) established the definition of the region in three categories: as an object of cognition, a tool of analysis and an instrument of action. Chojnicki (1999, pp. 327–353) proposed to reduce those three categories only to the analytical and objective concepts, and for many years this view seemed well-founded, and corresponded with the dualistic perception of the region, present in the literature of the subject throughout the world. However, today's situation of regional studies calls for a review of such an understanding.

In the contemporary reality, the region as an instrument of action has become the concept that is most frequently used. The need for regional research understood as an instrument of action stimulates regional studies also in the cognitive and analytical aspects.

Practical needs, as well as pro-regional policies of both individual Member States and the European Union as a whole, press for the operationalisation of concepts and the definition of regionalisation procedures. Also, the cultural dimension of the region has acquired a presence in the practice of socio-economic life. It was the entrepreneurship policy and economic competition that revealed the strengths and weaknesses of regions which stemmed from their cultural backgrounds. It became absolutely clear that the identification of the regional community with the region, its strong emotional ties, sense of attachment to its territory and its positive valuation add to build up a social capital which will provide a competitive edge in the region's competition with other regions. These features also protect the region against the degrading socio-economic phenomena and migration processes which can be devastating

both demographically and socially. Florida (2002) wrote about the so-called creative class, the presence of which dynamises regional development, increases the level of innovation among the local community and makes it more open to the absorption of knowledge – that is, which stimulates the development of the most desirable features of the local environment. The characteristic feature of this class is a great deal of freedom it has in selecting their place of residence, being definitely attracted by such localities which have all kinds of positive location characteristics. Place-making and establishing regional identity became operational concepts in regional policy. A review of current regional studies proves how strong are both the needs and practical pressures on exploring those topics. Furst (2003) made an assertion that place-making was an instrument for effective local governance, while Healey (2001) called for a more place-oriented system of planning in the United Kingdom. In a similar vein, Malecki (2003) reflected on what the competitiveness of location meant and why it was relevant for regional development. Tewdwr-Jones (2003) wrote that we should both create and shape places which have a goal, vision and pride, while Paasi (2003) observed that the development of regional identity was increasingly becoming an operational definition in the process of creating purely administrative territorial units by planners or politicians.

The problem raised by Paasi is one of the major issues in contemporary regional studies because it seems that there has been a confusion of ideas, whereby regional issues are treated as an object of cognition in terms of instruments of action. Features characterising natural regions with well-established environmental and historical features, regions which are identifiable in the course of the cognition process, namely the ones which can be objects of knowing, are attributed to regions which are instruments of action, i.e. administrative, planning regions which frequently come into being merely on the strength of decisions taken by administrative centres, and whose history frequently goes only several years back.

This problem is clearly visible in the regionalisation procedures arising from the harmonisation of the system of territorial organisation of countries joining the European Union. On the one hand, the EU's formal and administrative requirements, closely related to financial support systems, force nearly all the candidate countries to change their existing national administrative division systems, which, on the other hand, collides with an expectation which was explicitly expressed in EU documents that such regions would possess features characterising natural, historic regions (cf. Gorzelak 2001; Plane Kovacs 2001). This is the rationale for actions aimed to develop the cultural dimension of regions within administrative units. Activities which are initiated and procedures which are expected to help establish regional identity, to create regions-places, usually neglect one aspect which is critical for success and which cannot be eliminated, replaced or acquired –the time factor.

The table summarising the above discussion (Table 1) lists the major features of regional studies characterising the individual stages of their development. It

also highlights a broader context for changes which are occurring both in the societal awareness at the regional level and in the scientific status of regional research.

Table 1. Evolution of regional research

Regional studies	Scientific paradigm	Regional awareness	Role of geography in regional research	Dominant concept of the region
chorological approach	pre-modernist	strong – great interest in the world's regional diversity	dominant	object of cognition
Regional Science	modernist	weak – reduced interest in regional uniqueness replaced by uniformisation and standardisation of the world's socio-economic development	weak	tool of analysis
social and cultural interpretations	post-structuralistpost-modernist	strong – re-appreciation of great regional diversity of the world with a significant role of social and cultural factors	desirable, but still weak	instrument of actionobject of cognition

Source: prepared by the author

When addressing the issue of regional awareness, we should mainly relate it to increased or reduced interest it evokes in researchers. Among the region's inhabitants, the presence or lack of such awareness are due to more factors than the mere fact of the researchers' interest. It should be borne in mind, however, that all social studies, including regional, basically unite the subject and the object of their research – the society. As Adorno (1984) put it, the society as a subject and the society as an object is the same, however not quite the same. There can be no doubt than an increased interest of scientists and researchers in regional awareness helps raise this awareness in the regional communities, or at least makes them alive to its presence or lack. The period of chorological studies was certainly a time of keen awareness, among the society and the researchers alike, of huge regional discrepancies across the world. Modern civilisation trends did not favour cultivating regional differences and peculiarities in their social or cultural dimensions. Even if discussed, they were treated as a transitional stage towards a uniform society of the modernist era. The contemporary renaissance of regional studies is not only a re-appreciation and acceptance of a regionally diversified world but also recognition of the need for actions which would reinforce and heighten regional awareness among regional communities.

The relationships between regional studies and individual disciplines which examine the world's regional diversity have also undergone changes. Geography is unquestionably one of the sciences in which regional studies have a special significance. If we refer to the classical definitions of region and geography, we will see that they are nearly identical. Whittlesey (1954) said that the

region was an area of the Earth that was different from other areas, while geography was a science about the spatial diversity of the Earth's surface. Thus, it can be said that regional research represents the very essence of empirical and theoretical work in general geography. Not surprisingly, therefore, the position of geography in traditional regional research was dominant. On the one hand, changes in the scientific paradigm, the quantitative revolution in geographic studies, the birth of Regional Science pushed the interest in the region to the margin of the main trends in research. On the other hand, this meant that the central role in regional research came to be occupied by other disciplines, mainly economy. The consequences of the marginalisation of regional studies within geography can be felt even today, for example in such aspects as university curricula.

Regional geography as a subject is usually divided into separate courses dealing with physiogeographic and socio-economic issues in the regions. Frequently, such curricula are not synchronised even as far as the mere selection of regions is concerned, which makes it rather impossible to build up knowledge about the specific nature of particular regions, based on a mosaic of environmental, economic and cultural factors that is so difficult to identify. The contemporary need for regional studies which would combine and synthesise this extremely complex matter are not reflected in geography, which apparently stands rather helpless and desolate in face of this challenge. The requirements of the modernist methodological paradigm have led to an internal rift and narrow specialisations within the discipline as such. As a result, it has lost what could be its most valuable contribution to the common body of scientific research – the capacity to summarise and capture phenomena in their mutual interplay, which is the essence of the real, coherent world. This is the kind of approach that contemporary theory, methodology and practice of regional studies need the most.

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