

A Personal Perspective on Mario Polèse's Research in Regional Science

Richard Shearmur

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En l'honneur de la carrière de Mario Polèse

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Résumé de l'article

In this brief paper I outline some of Mario Polèse's work in regional economics and local development that has marked my career and which has inspired much of my own research -, first as his student, then as his colleague. Notwithstanding the importance of his work, I try to point out the other - probably more important - ways in which Mario Polèse has influenced me, and - I suspect - other students and colleagues. This influence comes more from his integrity, fearlessness and humanism than from any specific idea or paper - though these qualities also permeate his writing on regional economies and cities.

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A PERSONAL PERSPECTIVE ON MARIO POLÈSE'S RESEARCH IN REGIONAL SCIENCE

Richard Shearmur

Richard Shearmur

Professor and Director of the School of Urban Planning
McGill University
Macdonald-Harrington Building (Room 400)
815 rue Sherbrooke Ouest
Montréal (Québec) Canada
H3A 0C2
richard.shearmur@mcgill.ca

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Abstract:

In this brief paper I outline some of Mario Polèse's work in regional economics and local development that has marked my career and which has inspired much of my own research -, first as his student, then as his colleague. Notwithstanding the importance of his work, I try to point out the other - probably more important - ways in which Mario Polèse has influenced me, and - I suspect - other students and colleagues. This influence comes more from his integrity, fearlessness and humanism than from any specific idea or paper - though these qualities also permeate his writing on regional economies and cities.

INTRODUCTION

It is difficult to encapsulate the career and achievements of someone in a short article: that is why biographies are usually hefty tomes, and biographers perform meticulous archival research. Despite this, there is no such thing as a definitive biography: as each biographer and each generation reinterpret material, and as new material comes to light, the life and achievements of the biographee are re-evaluated. Mario Polèse, an inveterate reader – especially of history books and biographies – would be the first to warn me against attempting to be definitive or complete. Furthermore, he would advise me against putting pen to paper without meticulous research and evidence, and would carefully assess and critique anything that I write.

It is fortunate, therefore, that this is not a biography. Rather, it is a personal assessment of how Mario Polèse's contributions and approach to research have affected my own work, and of how our collaborations – whether writing papers, editing books, or supervising students – which have now spanned almost 25 years, have shaped my attitude towards academia as a profession.

I arrived on the scene of Mario's achievements rather late, and my own academic career developed under his supervision, critique and astute questioning. It has also been influenced by the stories Mario Polèse tells about his life, his readings, his experience as a policy advisor, his travels and his appreciation of good food. This is probably the most important lesson that Mario has taught me: research must be taken seriously when it is being performed and presented – it is a job, and must be performed honestly and meticulously because it can have an impact on decisions and on how people view the world. It can also be immense fun, stimulating in the same way that video games and puzzles are stimulating. Yet research is not an end in itself: it only makes sense if it contributes to (and hopefully marginally improves), the real world of work, communities, family and everyday living.

MEETING MARIO THE GREAT

I started working with Mario Polèse by chance in 1995. Jeanne Wolfe, the director of McGill School of Urban Planning, where I was doing my master's, mentioned that there was a professor over at the INRS (Institut National de Recherche Scientifique) who was looking for a research assistant. Overwhelmed by the joys of fatherhood and course work, I did nothing about it. Three weeks later Jeanne Wolfe asked if I had connected with Mario Polèse: I prevaricated. She raised an eyebrow and said I ought to get on with it, which I did.

At the time Mario Polèse was working closely with William Coffey, and my task was to structure a large database of census employment data for all urban and rural areas in Canada. In those days, data consisted of streams of text on floppy disks, with a small appended file indicating where breaks between variables were, where the decimal point of each number was, and, of course, whether the variable was character or numeric. I sat in front of a blank SAS screen, wondering what to do for a few months, until, with the help of a fellow student, I began to figure out how to program and how to structure data. This was a key moment – I learned that the best way to understand a database, to get a feel for what structures are there and what its limits are, is to pore over it, test it, understand each variable, and

iron out its errors. It is a fascinating and time consuming exercise: attention to data is one of Mario Polèse's hallmarks, one he and William Coffey taught me by throwing me in the deep end.

Over the next few years I worked more closely with William Coffey (my PhD supervisor, also an important influence on my career), but regularly saw and chatted with Mario Polèse. It is only when I started working at the INRS, in late 1998, that I began to get to know Mario better.

INRS: MARIO POLÈSE'S HOME FROM HOME

The INRS is a research institute, part of Université du Québec. It was founded in the late 1960s as the province of Québec sought to establish its own institutions, in view of consolidating French culture in North America and of possible separation from Canada. Mario, at the time freshly out of his regional science MA with Walter Isard (University of Pennsylvania), was instrumental in setting up what eventually became INRS Urbanisation. It is difficult for researchers of my post baby-boom generation to understand what it was like in the 1960s and 70s. For us, seniority arrives, if at all, in our 40s or 50s: PhDs were usually only completed in our early thirties, post-docs took another few years, and formal academic careers only began when we were in our mid to late thirties.

In the early 1970s, things were different: PhDs were often obtained when people were in their mid twenties. Furthermore, many people became professors with "only" an MA in hand, and took on positions of responsibility before they were thirty. This was the case for Mario Polèse, who was involved in talks that led to the INRS's foundation in the late 1960s, and began working there prior to obtaining his PhD in 1973. By the mid-1970s, PhD in hand, he was seconded to Québec's ministry of immigration as special adviser to a deputy minister. By his mid thirties his academic career resumed at INRS Urbanisation (of which he was director from 1980 to 1989), with a wealth of organizational, managerial and political experience under his belt.

LOCAL DEVELOPMENT AND ITS DISCONTENTS

I am not well positioned to comment or describe the earlier years: I only met Mario Polèse when he had become a well established academic, respected in Québec as a key authority on matters of regional economic development and policy, and beyond Québec for his academic work. As far as I was concerned, two elements of his reputation preceded him: first, the papers he wrote with William Coffey on local development (Coffey & Polèse, 1984, 1985). At a time when "local development" was to regional economies what "innovation" is to them today, Coffey & Polèse unpicked the idea, conceptualising it within the framework of endogenous development, meticulously thinking through what its potential and limits were.

In 1996 Mario revisited these papers, writing a crucial chapter titled "*Le développement local, revu et corrigé: récit d'une douce illusion dangereuse*"¹ (Polèse, 1996). In the chapter he outlines the limitations of local development theory: in a nutshell, he argues that whatever efforts and mobilisation local communities put into their development, local economies are subject to powerful external constraints

¹ Local development revised and resubmitted: the story of sweet yet dangerous illusion.

– such as their location relative to markets, their size, the wider regional economy, market conditions – which can easily overwhelm even the most well thought-out local policies and committed communities. This chapter, written in French, has remained relatively obscure, yet the ideas in it are critical to the work that he and I undertook over the years that followed.

The chapter reflects how the thinking of William Coffey and Mario Polèse had evolved: after their papers on local development they had, sometimes together, sometimes separately, written empirical papers on the economic development of Canadian regions, and had observed that some regions face almost insurmountable structural barriers to development. They proposed a simple local development model (the premise of which is set out in Coffey & Polèse, 1987 and Coffey, 1987, further refined and applied in Shearmur & Polèse, 2007), which incorporates two types of development factors. The first type consists of endogenous elements upon which local policy may have some traction, such as education levels, local costs, and certain demographic factors. The second type of development factor consists of structural elements, such as distance from a metropolitan area, region, industrial structure, size, etc... upon which local policy has limited traction. The database I prepared as a master's student in the mid 1990s was designed to explore and test this model, with the ultimate aim of parsing out the effects on local development (understood as employment growth and/or income growth) of these two types of factors.

The second element which had preceded Mario when I met him was his book, in French, titled *Économie Régionale et Urbaine*. On the one hand, this can be viewed as a detailed textbook on urban and regional economics. On the other hand, like all good textbooks, it presents a strong and coherent vision of the discipline, of current issues, and of the authors' intellectual pedigree. It also forefronts Mario Polèse's pedagogical approach: whilst not devoid of equations and supply and demand curves, the book is a good read, displaying Mario's passion for, and delicate understanding of, regional economic processes. It was reading this book – one of the few, if not the only, such book written and published in French – that I gained my basic understanding of what regional economies are and of how they can be analysed. Needless to say, being asked to approach such a towering authority left me daunted – I needed a nudge to go knock on his door (in those pre-e-mail days).

THE CALL OF THE PERIPHERY

I joined the INRS in late 1998, and immediately started working closely with Mario. The institute's mission is to undertake applied projects, usually contracts for public bodies such as municipalities, regions, and ministries, whilst also training masters' and PhD students. As soon as I joined, Mario Polèse got me involved in contracts, encouraging me to lead them and providing judicious and encouraging feedback. Within a year we had embarked on a project that not only shaped my career, but probably shaped the latter half of Mario's as well.

In the mid to late 1990s the Québec branch of Canada's federal development agency (EDC – Economic Development Canada) was faced with a delicate issue. There had been multiple closures of mines, fisheries and paper mills in various peripheral parts of Québec, and each was treated as a separate crisis. Local people, understandably desperate, blamed the government for allowing these closures, and local politicians were calling for measures to boost their local economies. At the time there was a cadre of experienced civil servants

at EDC, who strongly suspected that the problems faced by peripheral regions were part of wider structural shifts in Canada's, if not the world's, economy and its geography. Without explicitly mentioning this suspicion, they called upon Mario Polèse and his young colleague (myself) to perform a wide ranging empirical study of peripheral regions in Canada and internationally, in view of understanding their recent evolution.

For about twenty-four months we travelled to many outlying regions, gathered and analysed data (updating the database I had worked on as a master's student), arranged international workshops and commissioned reports by local specialists. We spent long and noisy hours in small propeller driven aeroplanes, staying in outlying places few people have the opportunity to visit, discussing issues with local politicians, business people and residents. Once our report was completed (see Polèse & Shearmur, 2002), we returned to these places to present our (unpopular) findings.

It is during this time that I began to understand why Mario's textbook is so rich. It goes without saying that he is an incisive and insightful academic. But it is maybe less obvious that his insights and understanding of regional and local economies also rest upon his deep humanism, a product of his roots and upbringing, of his international outlook, and of his wide-ranging knowledge of history, languages and culture. This humanism is not always apparent: in Québec he has often been the harbinger of tough results, describing processes that have unfortunate consequences for local communities. For example, the conclusions of our study on peripheral regions are summed up in the title of a paper we wrote: "*Why some regions will decline: A Canadian case study with thoughts on local development strategies*" (Polèse & Shearmur, 2006).

Mario Polèse's stark conclusions have sometimes led him to be perceived as a heartless economist, with no compassion. This is nonsense. It is true that he does not sugarcoat his conclusions: from what I have witnessed, his attitude is that researchers should do their job meticulously and honestly, and then present what they find. Conclusions may be stark, and people may not wish to hear them: but it is part of a researchers' job to report findings, even if they are unpopular, and to remain open to reasoned critique of methods and interpretations. If research is well-conducted, then the researcher is on safe ground: if not, the research's weakness should emerge from its critique and it can then be improved. Regarding our 2002 report, a recent headline in a Québec newspaper (eighteen years after the report came out) reads: "*Près de 200 municipalités pourraient fermer d'ici 2025*"² (Tremblay, 2019). In retrospect, and in the light of on-going local development challenges, the structural changes Mario Polèse and William Coffey observed and analyzed in the 1980s, their doubts about the capacity of local development to alter the underlying course of regional development, and our work exploring and furthering these ideas, have been confirmed at the aggregate scale³.

Part of Mario Polèse's approach to research is his willingness to engage with people, especially those who strongly disagree with him: as I learned how to undertake large research projects, Mario also showed me how important it is to present conclusions, even to unhappy audiences. As we travelled around to outlying communities explaining our findings, we heard many passionate counter-arguments and emotional denials of the role structural factors play in the fortunes of local communities. We were the messengers, and as such we were there to be shot: this revealed Mario's understanding of and sympathy for the audience's distress, his empathy with the communities, and – in every single case – his ability to allow the audience to express their emotions before calmly explaining what the

² Almost 200 municipalities could close by 2025.

³ Mario would be the first to admit that in some cases local communities manage to pull through against structural odds: this usually results from a combination of luck and the presence of exceptional local leaders.

wider economic situation entailed and discussing possible futures with them.

Mario Polèse and I worked and published intensively on regional development for about seven years – from 2000 to 2007. Since then we have updated his 1994 book, bringing out three new editions, and published a few papers extending the development model to France. We also wrote a book discussing France's fortunate economic geography (Polèse & al, 2014) – another contrarian move by Mario, since accepted wisdom in France is that everything is going badly! However, as all partnerships, ours slowly loosened as I began to explore how innovation occurs outside of cities (a direct consequence of my travels and discoveries with Mario in the late 1990s and early 2000s), and as I continued my research on the intra-metropolitan space-economy and on business services (more closely connected to my work with William Coffey). For his part, Mario Polèse has further developed his work of regional economies, in particular studying the effects of the 2008 recession (e.g. Dubé & al, 2013; Dubé & Polèse, 2016). He has also performed research on the evolving intra-metropolitan location of economic activities (e.g. Duvivier & Polèse, 2018). Maybe more importantly – to the extent that it presents an overview of his thought – he has written *"The Wealth and Poverty of Regions: Why Cities Matter"*. This book cannot be adequately summarised in a few words, but suffice it to say that it has become an academic best-seller, translated into a variety of languages, including Chinese. We continue to work together supervising students, and reading and commenting on each others' work.

Our evolving research interests have led to renewed discussions and debates: Mario and I don't always see eye to eye, and, even when we do, we often don't realise it until we have thrashed out our concepts, methods and hidden biases. Mario is a great critic: his healthy skepticism about my current research keeps me on my toes. His close reading of initial drafts, and our e-mail exchanges about a wide variety of topics, are a constant source of fun and stimulation.

A FINAL FEW WORDS

Mario Polèse's body of work is considerably more extensive than most people imagine, and continues to expand. He writes in English, French and Spanish, publishing in all three languages. Some of his key pieces, such as the 1996 chapter questioning local development and his 1994 book, are in French, little known to non-French speakers. This capacity and willingness to write in multiple languages – maybe to the detriment of wider recognition for his work – speaks to his understanding and respect for local cultures. Especially in Québec, where the defence of a vibrant French culture has been a major issue throughout Mario Polèse' career, writing in French is a statement, a recognition that non-Anglophones, especially younger students and professionals who may not have had the leisure to learn academic English, deserve to have access to ideas and texts written in their own language. For a culture to survive it needs to be alive, with original films, literature and research appearing in its language: Mario's willingness to use his linguistic abilities to produce original work in languages that may garner fewer citations than English signals, to me at least, his respect for and understanding of this. It also signals that citations are a poor measure of the impact of what researchers write.

Quite apart from his academic work, but in keeping with his meticulousness, honesty, and fearlessness to speak his mind, Mario Polèse has participated in public debates surrounding Quebec separatism. In the 1960s and early 1970s, Mario Polèse was sympathetic to Que-

bec separation. In 2009 he published *"Serions-nous plus libres au lendemain d'un Oui?"*⁴ – an analysis of the consequences of voting for separation on the freedom of Quebecers to develop and defend their economy and culture. He concludes that Quebec probably has more latitude to do this within the Canadian federation. This book is neither a recantation of separatism, nor a dewy-eyed apology for Canada: rather, it is an exploration of what separatism hopes to achieve – i.e. economic and cultural freedom – and an analysis of whether separating from Canada is the way to achieve it. Similarly to his stark but well thought through conclusions about structural forces that penalise outlying localities, Mario Polèse laid out these ideas on Quebec separation knowing full well that he would attract the ire of some, the unsought co-option of others (and probably a nod of agreement from many...).

This engagement, informed analysis and relentless drawing of conclusions (even if they are unpopular) sums up Mario Polèse as I came to know him when I was a student, and later as a colleague: a man of principle, a humanist, and an astute analyst of the human condition. His background, involving flight from the Nazis as a child⁵, immigration to New York then Québec, and then his career that straddled academia, politics and policy-making, lend depth to his approach to urban and regional economics. He is generous with ideas, constructively critical with students and colleagues, and continues to be an exceptionally productive, incisive and original scholar. The greatest lesson I have learned from him is that although research is, of course, serious business, it can be (and should be) fun: what better way to while away a career than exploring new ideas and discovering how the world works? But research is a job: living life to the full, enjoying it, and taking stands when necessary, are more important still.

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⁴ Will we be more free the day after a Yes vote?

⁵ Arnold, J., 2018, Holocaust Remembered at Yom Ha-Shoah Commemorations in Montreal, The Canadian Jewish News, 15th July 2018, <https://www.cjnews.com/news/canada/holocaust-remembered-at-yom-ha-shoah-commemorations-in-montreal>.

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