

Just company regions? The long-term impact of big steelmaking firms on industrial path development: The cases of Asturias and Umbria

Doctorando: Guillermo Antuña

Directores: Jordi Catalan y Marc Prat

Abstract

This study aims to analyze the influence of large steel companies on the development of the metalworking sector in the regions of Asturias and Umbria from the end of the post-WWII reconstruction to the outbreak of the Great Recession. For this purpose, a detailed analysis of the evolution of the productive structure of the sector in both regions has been carried out at four temporal cross-sections from 1958 to 2011. The main archival sources used have been the Censo Industrial de Empresas of 1958 and the Input-Output Tables (1978-2000-2010) for the case of Asturias, and the Censimento Generale d'Industria e Comercio (1961-1981-2001-2011) for the case of Umbria.

The very preliminary results obtained so far indicate that the impact of the large steel industry in both regions was uneven. In the region of Asturias, the establishment of Ensidesa catalyzed the development of numerous metalworking enterprises. Over time, these entities experienced considerable growth, eventually constituting a competitive foundation robust enough to endure the challenges of industrial restructuring and to penetrate international markets. This evolution was facilitated by the formation of an agglomeration process centered around basic steel production, which eventually culminated in the creation of a hierarchical industrial cluster. This cluster not only consolidated metalworking activities but also significantly contributed to their advancement.

Contrastingly, in Umbria, the Terni company did not exert a sufficiently influential force to cultivate a substantial metalworking network within the region. While it is acknowledged that a segment of the local industry is associated with steel production, particularly in the province of Terni, it is also evident that the establishments in Perugia demonstrate minimal linkage to steel production or to the broader local industry. Diverging from the Asturian model, the metalworking entities in Umbria, despite being larger on average relative to other local industries, do not exhibit a discernible pattern of territorial agglomeration. Moreover, they have not established strategic networks of interaction and are notably reliant on contractual engagements with larger corporations situated in the northern part of the country.