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**The evolution of
Italian
publishing from
the early
twentieth
century to this
day**

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Introduction

The Italian publishing market has undergone significant changes and evolution over the years, starting from the 1930s and 1960s with the rise of prominent names in the industry such as Arnoldo and Alberto Mondadori, Valentino Bompiani, Giulio Einaudi, and others. These entrepreneurs shaped the backbone of the Italian publishing industry with their unique publishing strategies, love for the idea of a “well-made book”, and attention to image rights and copyrights. However, it is debatable whether these entrepreneurial styles have had a positive or negative impact on the development of the industry.

In this dissertation my goal is to explore the evolution of the Italian publishing market over the past two decades and understand its challenges and limitations, as well as the gap between its goals and actual marketing strategy. The focus will be on the comparison of data related to sales, readership, distribution channels, and market shares from 2000 to 2022. The analysis will highlight the impact of the increasing popularity of e-books in the early 2000s and the shift towards digital books in the aftermath of the COVID-19 pandemic.

The research will also delve into the potential contradiction between the publishers’ aim of selling large quantities of books while targeting an elitist audience and the potential for a larger market through mass production. The goal of this analysis is to understand how the publishing market in Italy has adapted to the changing trends and needs of the readers and the market. By exploring the history and evolution of the Italian publishing market, this dissertation will shed light on its challenges and limitations and provide insight into its future prospects.

Chapter 1

The main publisher

The main publisher: an introduction

Between the 1930s and the 1960s, the names of Arnaldo and Alberto Mondadori, Angelo Rizzoli, Valentino Bompiani, Giulio Einaudi, Ugo Guanda, Leo Longanesi, Vito Laterza, Giangiacomo Feltrinelli, Livio Garzanti, Bobi Balzen and Roberto Calasso became the protagonists of the Italian publishing industry.

Despite the differences in their cultural and social background and their editorial choices, they were able to found companies that even during the post-war period, with Mondadori, formed the backbone of the Italian publishing industry. In the following pages, going through their biographical notes and a systematic literature review of works focusing on their business activity, I will try to demonstrate that, despite obvious differences, their approach to publishing and their entrepreneurial styles had some common features. They are:

1. Customized strategy for each publishing
2. Love for the idea of a “well-made book”, which is another way to define what a “classic” should be like
3. Attention to image rights and copyrights
4. Ability to foresee the market and meet the demand
5. Paternalism and strict company mindset, founded on authoritarianism

It seems that these characteristics “fit” the general public image of the “ideal” publisher¹, but have these entrepreneurial styles been positive or negative for the development of the Italian publishing industry? And what about the impact that these entrepreneurs and their choices had on the Italian cultural environment in general, did they manage to diffuse culture to a larger audience or ended up nourishing a restricted cultural elite?

¹ The concept of “ideal publisher” in this case, refers to the view of Gian Carlo Ferretti in *Storia dell’editoria letteraria in Italia 1945-2003*, where he identifies this type of publisher as someone whose activity was most relevant between the 30s and 40s and partially during the 60s and the 70s and was able to move from a more artisan or pre-industrial to an advanced industrial phase. Each “main publisher” was able to custom every project so much to give them a “literary-editorial identity” that extended to their loyal readers as well. Gian Carlo Ferretti, *Storia dell’editoria letteraria in Italia 1945-2003*, Einaudi, Torino 2004, p.11

In the image of the “main publisher” there are elements that suggest that strategies shaped by a strict patriarchal and narrow-minded mindset could be a liability for the company more than a strength. My hypothesis is that the ideals which Italian main publishers defined as their core values did, in fact, more harm than good to the growth of their companies: I see a key contradiction in their attempt at selling large amount of copies while targeting an elitist audience, and a potential market significantly smaller compared to what they should have targeted if they had aimed at mass-production.

Arnoldo Mondadori (1889-1971)

Founded in 1912 in Ostiglia by Arnoldo Mondadori (Poggio Rusco 1889 - Milano 1971), that since his young age (1907) started his activity as a typographer printing the socialist-inspired weekly newspaper *Luce!* Printing copie for the army (1915-18) the company grew exponentially and was able to buy a new typography in Verona first (1917), then to move the direction in Milan and build the industrial complex of San Lazzaro di Verona later (1921). Thanks to the help of some collaborators (in particular Valentino Bompiani), the Arnoldo Mondadori Publishing became the standard for the contemporary culture. Since 1920 Mondadori presented itself as a modern publishing industry with innovative titles different for each targeted public. However, it is with the prestigious edition of “Tutte le opere”, All the works, of D’Annunzio (1926-36) that he places himself internationally. He acquired famous authors like Pirandello (1932) and Fogazzano (1931). After Mondadori’s death his family was in charge of the company: firstly, his son Giorgio (Ostiglia 1917 - Figurine Valdarno 2009), then to the second son of Arnoldo from 1971 to 1982, lastly to Mario Formenton (Teheran 1928 - Milan 1987), husband of his daughter Cristina until 1987. Between 1989 and 1991, the group was contended between Carlo De Benedetti and Silvio Berlusconi. The dispute ended with the majority of the company share to Berlusconi’s Fininvest, while the Editoriale L’Espresso, the Editorial La Repubblica and the newspapers Finegil still belonged to De Benedetti’s CIR group. In 1991, Leonardo Mondadori became the chairman until his death (Milano 1946 - 2002). In 1988 he founded the Leonardo, with a significative number of titles of foreign fiction books, art history and essays. In February 2003 Marina Berlusconi became the new chairman of Mondadori.

From the last two decades of the XX century, the company grew and expanded steadily with the foundation along with Electa and Einaudi of the group Elemond (1989), expanding the market to the education acquiring Murcia Scuola (1988), Le Monnier group and Poseidon (1999) and, concerning the international market, the acquisition of Ediciones Grijalbo (1988),

Sperling & Kupfer (1995) and Emap France (2006), one of the main editors in France for newspapers. In 2001 the Grupo Editorial Random House Mondadori was founded, joint venture between Gruppo Mondadori and Gruppo Bertelsmann. In 2004 Mondadori publisher acquired 70% of the Casa editrice Piemme, active in young adults publications. In 2015 Mondadori group reached an agreement with the RCS Media Group and bought the RCS Libri for 127,5 millions of euros.

Mondadori will become the biggest publisher in Italy. It would be the main reference for every publisher that would later come, before even officially becoming a publisher itself. The core idea of Mondadori as a publisher, was to only give resonance to what the two founders, Arnoldo and Alberto, would consider “good book”, and said book should have specific characteristics that would give the impression of reading something timeless and “of culture”. Being able to identify a book as a pillar of culture was, according to Mondadori publishing, something that would make their company stand out and would only give prestige.

Something that can last through decades and create a true legacy was the goal for Mondadori and for the same reason, considering only the elite as their target would only make sense if they wanted to be considered as a landmark for years to come.

Mondadori was looking for a type of quality in his publications that translated into the idea of releasing a cult. The possibility of a book being a success in both the present and the future in terms of copies sold was the main goal of Mondadori when looking for authors and books to add to his catalogue. He followed this idea from the 20s to the 60s where we see recurring names belonging to the contemporary literature that were very diverse in terms of themes and possible target. For the same reason, he worked to steal from other Italian publishing houses authors that were already well-known in the industry. ²

For this reason, among the authors published by Mondadori as well those who signed a new contract with Mondadori and moved to his company, we find: Eugenio Montale, Brocchi (1961), D’Annunzio, Pirandello (1931), Margaret Mitchell (1937), Ernest Hemingway (1933), etc.

During Fascism, when Mondadori wasn’t forced to worry too much about his publications being confiscated, he used every strategy possible to make his choices look like something worth publishing during the regime even to the point of using self-censorship when it was something that could have saved a new release. So it was easy for Mondadori to have during

²Gian Carlo Ferretti, *Storia dell’editoria letteraria in Italia. 1945-2003*, Einaudi, Torino 2003, p. 20

the 20s and 30s D'Annunzio and Pirandello but not Svevo (that from 1938 was with Dall'Oglio): the former were somehow official during the regime, with their authority and success with potential of being seen as classics even in the near future, Svevo was for a long time dismissed and isolated (much to Mondadori's disappointment when he realized his value and tried in vain to bring him to his publishing house during the 60s). Again, Ungaretti, Salvatore Quasimodo and Montale represented what the XX century could be for the literature. Especially with Montale and his never ending editorial success as a poet, translator, essay writer, journalist for the *Corriere della Sera* and Nobel Prize he was already considered a classic before his death.

One of the main focus for Mondadori was to promote and support a type of literature that would be anti-fascist.

Throughout the years, it was not always easy to find a way to publish authors that were considered of values and were openly anti-fascist. For this reason, between the 60s – 70s when there was more freedom, we can see the publisher taking another approach, more experimental and open to different genres, that later became an actual literature-case: the publishing of D'Arrigo's *Horcynus Orca*. D'Arrigo was a debut author and his novel was extremely experimentalist, an opus magnum of 1257 pages that went through fifteen years of writing and editing and saw an extreme dedication from Mondadori that was sure he had found what he thought was always missing to his career as a publisher: an unknown writer, scouted by his advisor Vittorini, raised and nurtured at Mondadori's with his major work heavily marketed with an extraordinary launch that sold out 80000 copies in two years. Contrary to all the expectations, this book quickly became a best-seller with over 80000 copies during the first 2 years. This was somehow innovative for Mondadori because he never tried his strategy with any of the authors that signed with his publishing and is experimentalist and avant-guard considering Mondadori's usual strategy:³ it made Mondadori change its approach towards the company that shifted from being paternalized to business-oriented.

Angelo Rizzoli (1889-1970)

Angelo Rizzoli was an editor and a film producer born in Milan on October 31st 1889. He founded one of the most significant empires for the cinema and publishing industry during the XX Century.

³Gian Carlo Ferretti, *Storia dell'editoria letteraria in Italia. 1945-2003*, Einaudi, Torino 2003, p. 21

After an apprenticeship in a typography and a period of working at Alfieri & Lacroix, in 1909 Angelo Rizzoli decided to start his own business with a co-founder and opened a small typography in Milan, the A. Rizzoli & C., that had a rough start especially for the financial aspect. It was only after meeting the editor Calogero Tumminelli in 1917 that his destiny changed completely. Tumminelli founded in 1906 in Milan the publishing house specialized in art Bestetti e Tumminelli and from 1925 he was the first director of the Istituto Giovanni Treccani. Tumminelli introduced Rizzoli to the publishing industry and suggested to take care of some magazines from Mondadori that were overdraft like *Comoedia*, *La donna*, *Novella*, *Il secolo illustrato*, and he put Rizzoli in charge of the typographical execution of the Italian Encyclopedia of science, literature and arts, the one that would become “Encyclopedia Treccani”. So, between the end of the 20s and the early 30s, Rizzoli could get out of his nightmare with banks and reach a financial stability.

After that, Rizzoli started to diversify his activity sensing that his future would be brighter if he invested more time in the cinema as well as keeping his publishing activity. In 1934, with his new company Novella Film, he became the producer for “*La signora di tutti*” directed by Max Ophus, with Isa Miranda, to which followed in 1935 *Darò un milione* by Mario Camerini. Beside his new beginnings in the cinema, during the 30s Rizzoli had some significant productions for his publishing as well. His weekly newspaper comic and satiric “*Bertoldo*”, founded in 1936 and stopped after September 8th 1943, “*Omnibus*” his weekly release about politics and literature founded in 1937 and forced to stop by that-time censorship in 1939. To these experiences, Rizzoli also expanded into the Rome publishing with the acquisition of the new publishing house Novissima. In Rome he had the chance to make his name known in the cinema as well and he also bought the bi-weekly “*Cinema*”, directed by Vittorio Mussolini, while in 1938 he became the CEO of Era Film, a movie production company founded in 1937 whose president was Mussolini’s son himself, to then leave in 1940 after selling his shares to Scaleria Film. The collaboration with Vittorio Mussolini wasn’t his way to support fascism: during that time, in fact, Rizzoli helped people that were opposed to fascism and he was able to draw the line between politics and economics.

At the end of World War II, Rizzoli sensed a new exponential need for news and information that the new politics was going to have and to give to the society in Italy. For this reason, in 1945 he launched the weekly magazine “*Oggi*” (aimed towards a more conservative audience) and, that same year he also released the weekly satiric-political magazine “*Candido*”, that was clearly pro-monarchist and anti-communist, that stopped in 1961.

Another remarkable initiative was in 1949, when BUR, Biblioteca Universali Rizzoli, was founded: that had families as its main target audience. At the same time, Rizzoli had many success in the cinema industry with movies like *Domani è troppo tardi* (1950) and *Don Camillo* (1952) that proved to be extremely successful and profitable, so much that he acquired the weekly magazine “L’Europeo”, that was a reference for people leaning towards a more liberal ideology.

For what concerns the publishing industry, Rizzoli approach is different from the one Mondadori adopted: Mondadori starts by publishing books straight away in 1911-12, while Rizzoli starts first as a printer for third parties and newspapers in 1927 and only from 1929 will officially be publishing books. Moreover, Rizzoli is not going to found something like Mondadori that could be seen as a landmark, but rather an empire with a more business-oriented approach. For this reason Rizzoli can be considered an atypical main publisher, especially considering he made possible, and most importantly he made it work, an approach that was a combination of business-like risk and caution that would lead to founding the successful “Biblioteca Universale Rizzoli”, a.k.a. BUR, in 1948. The goal of this book series (in Italian “collana”: it is a concept that is not easy to translate literally in English since it’s something proper to the Italian publishing market), was to make books, and thus culture, more accessible by having a lower price. His approach was completely new and different since it was not connected to the elitist (and classist) idea of what books and culture should represent and should be, but it was aimed to the masses, intentionally, because Rizzoli would focus on his company’s profit. This approach and its collection was a success. So much, in fact, that investors, authors and other publishers would start calling him King Mida. However, his business success was compensating his lack of culture: it was commonly known among other publishers and authors that rather than a man of culture, Rizzoli was more versed into business.

The intention of Rizzoli was reaching a wider audience, hence his cheaper publishing aimed towards the masses, and this meant also including a variety of genres like romance and weekly publishing, as well as a diversity for what concerns the collections: you could easily find more curated books in terms of editorial choices, and he later started classifying his different price-point, genres and editions by “color-blocking” his series so that people could start recognizing his publishing and making associations between his products and the publishing house they belonged to. During the 30s and 40s the diversity in the Rizzoli’s catalogue were more evident: some publications that could be considered total opposite, in fact, coexisted. It was the case of the romance writer Luciana Peverelli and the Risorgimento

historian Cesare Spellanzon, on the weekly magazine “Omnibus” that was innovative and unconventional. Moreover, movies based on foreign bestsellers along with literature and art classics. For what concerns the physical books, Rizzoli went for a more curated edition with leather binding, in color and with more refined papers for its classics, and for a more minimal and plain cover and overall style for the BUR editions.

Valentino Bompiani (1898-1992)

Valentino Bompiani was Arnaldo Mondadori’s secretary and later manager of a small publisher in Milan, Unitas, where he was actually fired because he refused to publish a retelling of “I Promessi Sposi” written by a successful erotic writer Guido Da Verona. After this, he decided it was time to fund his own publishing in 1929.

His experience shaped not only his personality but also the way he decided the direction of his company. It was clear that he had two natures he was expressing through his publishing choices: editorial and literary, professional and human, business oriented mindset and artistic sensibility, his knowledge and rightness as well as being considered a reader and a friend. He would always use the casual “you” referring to his co-workers as well as his readers because it showed more empathy and will to really understand what people wanted. Some people would also say that he loved his authors too much, but this point of view actually helped his publishing reaching a much wider and diverse audience.

Bompiani, as a member of the main publishers, had many collaborators and worked very closely with them and even if they were in charge of finding new authors and screening the best options, Bompiani was never passively involved: he was actively looking for new authors, he often worked personally on the titles and many book covers are based on a draft that he drew on the first paper he could find in hand. The idea that Bompiani wants to give to his company through this methodology is that of a publishing house that is something in-between a small business and an intellectual relationship, that had few traits in common with the idea of a literary club. A selected group of writers, curators, translators, all friends to an extent, that shared their hardships and success, that followed the rules and were kind in their relationships. It was, in fact, Bompiani himself to find about Steinbeck’s *Of mice and men* (1938). More than the idea of “family”, like some other publishers operated instead, Bompiani wanted to highlight collaboration and a relationship based on mutual help. He was also the first to include a survey in his books to get feedbacks from the readers.

To this very specific internal organization, during the fascist period an equally specific strategy was added: the one that represented a publishing house innovative, nonconformist, that saw

the big picture and at the same time that fit well the market and the regime. Bompiani introduced a style for his graphics and marketing that was effective and original. During the pre-war period and during the war he alternated success by the Hungarian writer Ferenc Kőröndi (1937) and the Scottish writer Archibald Joseph Cronin (1937), whose books “The stars look down” and “The Citadel” were adapted into movies during 1938-39), “Cucciolo” by Marjorie Rawlings and the Mary Poppins series to a variety of titles and series that were easy to market and read: Van Loon, the scientific series *Avventure del pensiero*, the *Nuovissima enciclopedia pratica*, the paperback series *La zattera* with its contemporary writers, *Centonovelle* for the classics and many others. Like almost every other Italian publisher, he also had some financial support from the regime and he released *Mean Kampf* by Hitler, that was part of a series with other titles approved and liked by the fascist and Nazi regime.

The *Dizionario letterario*, was still ongoing during the war and it was released in 1946. It expressed the idea of something new and fresh, made with a lot of dedication and that represented a fortune that was going to last for a long time. The result was that idea of big picture and forward thinker that was mentioned earlier: thanks to the more freedom that the editors had in that period, and Bompiani’s personal instinct, he was able to make cultural choices for the *Dizionario letterario* that were unconventional: the series *Idea* novel that was predominantly idealist and open to phenomenology, existentialism, pragmatism; or like *Pantheon* and *Corona* (from 1940-42), that seemed to be more modern and opened to the European culture. Moreover, during the 30s and 40s he published works by American writers like Steinbeck (1938), Erskine Caldwell (1940) and James Cain (1945) with their violent social content. Among the Italian writers there were, Alberto Moravia (1937), Corrado Alvaro (1938), Elio Vittorini (1941), Vitaliano Brancati (1942). All of them felt deeply what was happening in Europe and the crisis and they shared their morals, secular vision and tension towards the Italian society and they were opposed to the fascist regime. Despite this, Bompiani was not an anti-fascist publisher but it is also true that he tried to find a good compromise by also publishing (and promoting) books and authors that were against the social system. This mediation helped him avoid censorship and sequestration from the fascist military force.

Giulio Einaudi (1912-1999)

Giulio Einaudi created his first cultural circle since his school years. Here he works for his school newspaper “*La Cultura*” (1934-35) with Cesare Pavese, Leone Ginzburg and

Massimo Mila. Founded in 1933, at first the publishing house curated the economy and finance magazine “La Riforma sociale”, directed by his father Luigi Einaudi. During those decades when he could work independently, both the publisher and his house started to shape their identity: the intellectual rigor, the democratic approach, the role of the magazines and the importance given to the essays. Giulio Einaudi inherited his democratic ideals from his father that was opposed to fascism and was better shaped later after meeting his friends and became a real opposition that led to the arrest of the entire group, the end of “Cultura”, countless censorship and confiscations and dramatic deaths during the 30s and 40s.⁴ Granted, he compromised for few titles but it was all part of a plan after the release of his friends from jail to secure a future to his publishing house.

One of his strength points was being able to find a balance in engaging a conversation with elegance and precision and to always be business-oriented. He was always keeping in mind that the intellectuals he tried to surround himself with and, in general, people belonging to a more aristocratic class, including foreigners artists, could be potential co-workers and add prestige to his publishing house.

These traits, the fact that he didn't feel any obligation towards authors and collaborators, along with patronage and some snobbery, a common trait among those belonging to the Einaudi group, even after death, Giulio Einaudi had always been considered “the Prince” or “the Sun King” of the Italian publishing landscape.

Starting from what he learned from his father and his first group of intellectuals, the image of a publishing house that is also a laboratory takes shape: it was sensitive to the political and cultural tension of the time, research-oriented and experimental. With an editorial politics influenced at first by Benedetto Croce that later was founded on Gobetti's tradition, on culture crisis and on Marx's contribution. The Laboratorio Einaudi during the decades will have specific and multidisciplinary locations, with recurrent meetings, summer seminars in Rhêmes Notre Dame, Val d'Aosta, as well as literary meetings of the Prix international des éditeurs: with contributions from many of the most important contemporary intellectuals. One of Einaudi's credits is represented by a so-called “direttorio” founded in 1941, whose members were Leone Ginzburg, Giaime Pintor, Cesare Pavese, Carlo Muscetta and then by the end of the 40s the editorial council “on Wednesday” that started to include also Felice Balbo and Massimo Mila, Franco Venturi and Norberto Bobbio, Elio Vittorini and Italo

⁴ Giaime Pintor *Doppio diario. 1936-1943*, Einaudi, Torino 1978, pp. 151-52, 195-96; Luisa Mangoni *Pensare i libri: la casa editrice Einaudi dagli anni Trenta agli anni Sessanta*, Bollati Boringhieri, Einaudi, Torino 1999, pp. 19, 60, 85-86, 102, 146-52 e passim

Calvino, Antonio Giolitti and Natalia Ginzburg and many others (some of them had already been working for the publishing for a long time).⁵ This was a real collective brain whose role was making projects, researching, and deciding for publishing matters. This trait was unique to Einaudi.

Inside this collective brain, Giulio Einaudi realizes the real publishing, a place where everyone is in charge of everything and it is a continuous exchange of ideas and skills. The fact that Giulio Einaudi was considered more future—oriented and a progressist, is shown in his idea of reaching a bigger audience by appealing the masses, not only the more educated classes. Giulio Einaudi embodies the main virtue of the main publisher: future-oriented and the research for new. For this reason, he publish the first translation of Proust. Even the Italian market identifies Einaudi as one of the most successful publishers of the time with his “La ragazza di Bube” by Carlo Cassola (1960), “Il giardino dei Finzi-Contini” by Giorgio Bassani (1962) and many others.

Giangiaco Feltrinelli (1926-1972)

Nowadays, the name Feltrinelli is linked to the idea of a successful publishing house that release successful books, especially novels, and that is targeted to a wide variety and diversity of readers. Until the World War II, the Feltrinelli family was generally considered one of the most important families in the Italian capitalism, along with families like Agnelli, Pirelli, Volpi, Breda, Falck, Cantoni, Donegani, that all represented a newborn Italy and were able to transform in a couple of generations a country heavily relying on agriculture as the main economic source to a new industrial nation. During the post-war period, the Feltrinelli name was not included in this list of entrepreneurs anymore. When World War II was ahead, the Feltrinelli was already at their third generation and when the other relevant names of the rising Italian industrial capitalism where just moving their first steps into the economy of the country, the Feltrinelli had already four decades of experience with their successes and initiatives in different economic fields.

The Feltrinelli family was a pioneer in the wood trading industry and they built their wealth exporting this material that was one of the main sources in Lombardy first, and through Italy later. They operated on the Alps, from Trentino to Tirolo, from Carinzia to the actual Slovenia. They were not the only Italian operators in those areas, but they were the only ones

⁵ Gian Carlo Ferretti *Storia dell'editoria letteraria in Italia. 1945-2003*, Einaudi, Torino 2004 p. 34-35

present simultaneously in all those zones and already in the 70s and 80s the Feltrinelli company was the most important Italian company for the wood trade. Strong in this position and determined to strengthen it, at the beginning of the Twentieth century they appeared in one of the richest forest areas of the European continent, Transylvania, at the time divided between Hungary and Romania. The constant growth of the activity, in certain periods extremely hard to handle, has put the family in the ideal condition of having to look for new investment opportunities for a rational and effective use of the large liquidity, which has characterized at least the entire 1800s phase of the company's development. The choices in the diversification process of investments fell first on railway construction, one of the most important businesses for the Italian economic-financial system in the first two post-unitary decades.

The diversification process of investments had two other main axes, real estate and finance. From the first, the family has obtained significant investment opportunities especially in Milan and Rome, contributing to the processes of real estate speculation that have marked decisive moments in the urban history of the two cities, but also representing an element of stability and continuity in the ownership structures of real estate realities that deeply mark the image of a historic center. The financial axis has been functional on one hand to the enhancement, in more modern and professionally more appropriate forms, of the liquidity generated by the family's core business, on the other to a more intense and pervasive integration in the economic-financial circuit of the Milanese market.

In a Milan that was changing deeply at the end of the 19th century, becoming a modern industrial city, becoming bankers meant, for the Feltrinelli, not only stabilizing their position definitively among the city's elite, of which they had already been a part for at least twenty years, but also meant significantly expanding their economic-social network, adapting it to the new forms of managing assets and to the more sophisticated needs of a more extensive entrepreneurial bourgeoisie.

When the history of a dynasty covers three generations, embracing about a century, one is always inclined to consider the third generation as the one that has reached the highest points of economic fortunes, social consideration and relevance in the public sphere.

The symbol of this status was reached in the 1920s-1930s, when Carlo Feltrinelli was one of the most known bankers internationally, a member of the International Supervisory Council of the Reichsbank, President of the Italian Credit, administrator of more than fifty Italian and foreign companies, president of the Federation of Wood Industrialists and Merchants and so on. One of the main features of this dynasty has always been keeping a low profile, something

that the Feltrinelli shared with the bourgeoisie elite of the time, Italian and not: hardworking, devoted to sacrifice, not inclined to flashy consumption models, in some ways living examples of the protestant capitalist, almost ascetic, painted by Max Weber, who almost avoids the material opportunities that his economic condition would certainly not lack, to concentrate all his energies in the family business.⁶ However, during the decades the Feltrinelli family went through many deaths that were also the cause of its decline. The downsizing was caused by objective causes like the economic crisis in 1929 and the switch of the main banks to IRI⁷ and not because of mistakes or limits that the one in charge at the time, Carlo Feltrinelli, Giangiacomo's father, might have had. After Carlo's death, his brother Antonio was not able to reorganize the group that Carlo outlined in 1920 and that could have saved their shares so he was not able to keep up with the prestige of the family, despite still being wealthy.

Giangiacomo Feltrinelli was born in 1926 and founded his publishing Feltrinelli in 1955. It was different from other publishing houses because of its variety in terms of catalogue, an affordable price for the books (especially those belonging to the series ("Universale economica")) and for a the quantity of new titles. Among them, the first edition for its worldwide release of *Dottor Živago* by B. Pasternak (1957) and *Il Gattopardo* by G. Tomasi di Lampedusa (1958). Politically identifying with the left-wing, the publishing house was particularly close to current events, contemporary history, and the philosophy of science. In 1948 F. founded the Istituto G. Feltrinelli (later renamed the Fondazione in 1972); particularly active in studies on the working-class movement, in 1958 it began publishing the *Annali*. Feltrinelli himself, involved in the extreme left and convinced of the probability of a coup, entered into clandestine activity in the late sixties, dying in circumstances that have never been fully clarified. After his death, the direction of the publishing house was taken over by Inge Schöntal, Feltrinelli's former wife, who particularly strengthened the collections of literature and epistemology.

⁶ Luciano Segreto *I feltrinelli, storia di una dinastia imprenditoriale (1854-1942)*, Feltrinelli Milano, 2019, pp. 12-15

⁷ IRI (Istituto per la Ricostruzione Industriale) was an Italian state-owned holding company created in 1933. It was designed to manage and restructure the country's industrial sector during the period of Fascism. It was the largest company in Italy and one of the largest in the world at the time, with holdings in various sectors such as steel, electricity, transportation, and banking. IRI played a major role in the Italian economy for decades, but after the fall of Fascism, it was restructured and privatized in the 1990s. *Dizionario di Economia e Finanza*, Patrizio Bianchi, Treccani Roma, 2012

Chapter 2

The evolution

The coming of the novel

Arnoldo Mondadori (1889-1971) and Franco Ciarlantini (President of the Italian Publisher Federation 1926-40), were among the first publishers to treat books like any other product and implement marketing strategies. They were followed by Rizzoli and Bompiani, each with their own unique approach. However, all publishers had to adapt to new forms of communication such as cinema and radio. From 1926, Mondadori published a range of genres, always with the goal of reaching a wide audience. During the fascist regime in Italy, the book market was heavily restricted and lacked diversity, leading to slow sales. There were only 30000 avid readers and around 2000 "long-sellers" with sales of 5000 copies or more. This was due to the elitist nature of the book market in Italy and widespread illiteracy, especially in rural areas. This created a perception that Italians "don't like reading," a concept that persists to this day.

The end of the fascist regime, the Cold War, and the rise of democratic, center-oriented governments led to a process of "normalization" in Italy. This resulted in the disappearance of small publishers and the strengthening of the traditional book market. The main publishers became more traditional and less risk-oriented, while reading became more restricted due to illiteracy and competition from new technologies like radio, television, and cinema. This situation during the 50s was noted by Giambattista Vicari, pioneer in the history of Italian publishing through the decades, who ranked Italy low in his European Poll for Literature.⁸ At the same time, the neorealism movement in literature brought deep contradictions, as evidenced by the divergent narratives of Silvio Micheli (*Pane Duro*, Einaudi 1946) and Italo Calvino (*Il sentiero dei nidi di ragno*, Einaudi 1947). The movement was also marked by an inadequacy in expressing the past and present, as seen in the memoirs and reports of Corrado Alvaro, Natalia Ginzburg, and Primo Levi. However, there was a gap between the language

⁸ Vicari Giambattista, *Editoria e pubblica opinione*, Roma, Cinque lune, 1957, pp. 57, 64, 67, 146-52; *Editoria italiana negli anni novanta: tendenze e problemi dello sviluppo* 1990, p. 14; *Storia dell'editoria nell'Italia contemporanea*, Gabriele Turi, Giunti, Firenze, 1997, p. 396; *Storia degli editori italiani* - Nicola Tranfaglia - Albertina Vittoria, Laterza, Roma-Bari 2000, pp. 42-43.

used by intellectuals and the reality experienced by the general population.

On the subject, Italo Calvino made an example about Cesare Pavese that was considered an example among the writers who were considered more in touch with reality and he wrote:

“scrive poemetti con operai e barcaioli e bevitori, non ci fa mai dimenticare che il protagonista non è l’operaio o il barcaiolo o il bevitore, ma l’uomo che li sta guardando in tralice dal tavolo opposto dell’osteria, e vorrebbe esser come loro e non sa”.⁹

In Italy, the issue of books and reading being seen as only for the elite persisted and there was no effort to make it more accessible to the masses. Despite the struggling economy, the publishers who had established their businesses on an elitist and classist idea of books continued to follow this approach, even after the war. This resulted in a lack of diversity and initiative among Italian publishers, who sought to distinguish between what they considered to be "culture" and "education" and what was widely read, as they focused more on photo novels and fiction that were on the rise.

The sectionalization

In the 1950s, the publishing industry underwent significant changes with a clearer division of production aimed at serving the needs of a new, capitalist-oriented society. In 1949, two cheap book collections, Biblioteca Universale Rizzoli (BUR) and Universale Economica della Cooperativa del Libro Popolare (Colip), were established in Milan to target both regular and potential new readers. This led other publishers, such as Einaudi and Bompiani, to follow suit and create similar collections to promote information and education to the masses. The first encyclopedias and scientific books were also published, giving birth to collections such as Biblioteca Moderna Mondadori (BMM), which sold three million copies in its first four years. Zanichelli in Bologna, Utet in Turin, and Liguori in Naples, among others, took an educational approach and published dictionaries, literature, and academic books.

During this time, there was a shift back to more traditional forms of writing, such as poetry and biographies, in contrast to the post-war focus on essays and scientific writing. Einaudi made changes to its scientific series: in 1957 for “collana viola”, transferring some of its series (that included Sigmund Freud and Carl Jung) to Paolo Boringhieri's publishing house Boringhieri and in 1960-61 following Franco Fortini's idea, Piccola Biblioteca Einaudi abandoned its technical-scientific focus. The role of writers was becoming closer to that of

⁹ Il midollo del leone, in *Paragone*, n. 66, giugno 1955, che cito da IBID., *Romanzi e racconti*, vol. II, Milano, Mondadori, 1992, p. 11.

reporters, with an emphasis on on-field reports and documented investigations. This approach can be seen in the works of Franco Fortini, Carlo Cassola, Carlo Bernari, and Curzio Malaparte in the 1950s, and Giovanni Comisso, Goffredo Parise, Alberto Moravia, and Guido Piovene in the 1960s. The influence of literature was also felt in the production of professional journalists, from commissioned books to novels.

Overall, this era had its contradictions, including the concept of the "Republic of Letters," which was first used by the humanist Francesco Barbaro (1390-1459) in the 15th century. This referred to a group of literates with common interests who shared their passion for the arts and went beyond geographical borders. In fact, among the centuries the capitals of this Republic moved from Florence to Rome, then to Venice, Aix and Paris along with London and Amsterdam. However, as described by Marc Fumaroli, this also meant isolating from modernity and looking back to the past.¹⁰

The "Republic of Letters" was a term used to describe the network of individuals, relationships, and institutions that existed during a certain period of time in the history of literature. This network was made up of authors, bookstores, cultural centers, and various other entities that facilitated communication and intellectual exchange among literary figures. Despite its many benefits, the "Republic of Letters" was not without its drawbacks. One of these was the contradiction surrounding literary prizes, particularly in the early post-war period. For example, the "Premio Strega" prize was established in 1947 at a time when intellectuals gathered in Rome and shared a common aesthetic ideal, but the meetings were more mundane and less philosophical. Another example: in 1946, the Viareggio prize resumed after being interrupted by war. Umberto Saba won with "Il canzoniere" and Silvio Micheli with "Pane duro," demonstrating the presence of anti-fascism but also a lack of critical sense.

However, the pros of the "Republic of Letters" far outweighed the cons. One such advantage was the intense communication among authors and the real potential to discover new texts and authors through animated debates and discussions. The reviews and criticisms that appeared in newspapers, weekly news magazines, radio programs, and other media outlets were also aligned with the interests and perspectives of the average reader and reflected the idea of being part of a specific intellectual orientation. The inserts about books in newspapers such as "Giorno" in 1956 and "Paese Sera" in 1960 anticipated some aspects of the rise of the Italian novel and were closely tied to the critical debates and information that were taking

¹⁰ Marc Fumaroli *La repubblica delle Lettere*, Milano Adelphi 2018

place at the time. However, one major drawback of the critical activity and reviews of the period was their indifference towards productions that were considered far from being new or of "quality," such as cheaper editions and extremely successful novels.

During the period of 1945-58, which covered the entire publishing market, fiction, and especially novels, played a leading role. The pioneer of the rise of the novel in Italy was Mondadori, with its consultant Elio Vittorini, who created a series of successful book series that made it possible to establish the "Classici Mondadori," a book series of classics that remains relevant to this day. Despite the spread of books and authors, one of the cons of the "Republic of Letters" was the limited exposure to foreign literature, which was a common problem among Italian publishers at the time. It wasn't until Angelo Rizzoli adopted a more business-like approach and started to focus more on mediums like cinema and newspapers, as well as topic-based book series rather than author-based, that the Italian press started to change direction and become more open and up-to-date. Rizzoli continued to promote romance novels as a form of literature aimed at a wider audience, and his cheaper BUR editions made foreign novels a success even in the more narrow-minded Italian landscape. On the other hand, Bompiani, while still firmly committed to its "everyone should be able to do everything" approach, started to define specific roles more clearly during the period of 1945-52. This era was a particularly lucky one for Bompiani, with the publication of "The Little Prince" by Antoine de Saint-Exupéry (1944), which marked the beginning of a new era for book series, scientific publications, and non-fiction. The experimentation with new genres and styles of publication sparked a new interest that was closely tied to the love for discovery and adventure, even in terms of authors and books, and was closer to the idea of literature. Over the years, Bompiani has been a symbol of an intelligent, cultured, secular, modern, and cosmopolitan publishing house, and was the first to introduce on the Italian market novels by Nobel Prize-winning authors such as T.S. Eliot (1948), Albert Camus (1957), and John Steinbeck (1962).

Italian novels and paperbacks

Between 1956 and 1960, the production of books in Italy saw a 43.4% increase, the highest growth since the post-war period. The rise in general interest in newspapers and cinema led to a doubling of the number of families who read books between 1957 and 1965.¹¹

¹¹ *Almanacco Letterario Bompiani* 1959, Bompiani Milano 1959, p. 266; Alberto Cadioli *L'industria del romanzo*, , Riuniti Roma, 1981, pp. 61-64; Giuliano Vigni *L'Italia del libro. Struttura, produzione e mercato editoriale*, , Editrice bibliografica 1990, p. 17.

Radio and TV indirectly promoted books by promoting new publications and changing the role of booksellers. Booksellers had more authority over their job, and people trusted and sought their reviews and recommendations before making a purchase. The process of buying a book was diversifying, with options for first editions, paperbacks, and various genres, including detective stories, sci-fi, comics, and romance novels. Reading was becoming more accessible to the middle and working classes, and consumerism and diverse interests were on the rise.

New strategies aimed at increasing book sales were successful, and Italian authors were competing with foreign authors, sometimes even becoming best-sellers with sales of 50,000 to 150,000 copies in just a few months. However, there was a significant gap between average book sales and best-seller sales (with an average of 3000 copies per book).

In April 1965, Oscar Mondadori celebrated a successful season for its cheaper book series, followed by similar initiatives from other publishers such as Garzanti, Sansoni, and Longanesi. Oscar's unique selling point was its focus on the novel, the most successful genre at the time. The publisher chose notable writers from the 17th and 18th centuries, offering a recognizable product at an average price of 15€ today with a romantic cover design. The success was achieved through high-quantity print runs and a heavy marketing campaign through newspapers and weekly editions.

The publishing market in Italy was growing thanks to a change in the approach to reading and marketing books. The focus was now on the average reader, not just the elite, and the popularity of less "cultured" genres was attracting more people to reading. Italy was taking a more modern direction in culture and education, leading to a transformation in the idea of knowledge in schools and society and contributing to the literary boom. The growth was also heavily influenced by television, leading to the alphabetization of the masses, middle school reform, worker's struggles, and liberalized access to university. These factors all contributed to the national alphabetization process.

The concentration process

In Italy during the 1960s, the cultural industry began to experience mass production. This was due to modernization, economic growth, and the evolution of the main publishers in the country. This led to the formation of industrial concentration in certain regions of Italy that would continue for decades. The period from 1969 to 1971 was particularly critical, as two financial crises impacted many companies, especially those with a "big-company" approach, as this was a new concept at the time when most companies were family-run businesses.

From 1969, the focus became more profit-driven, with publishing companies seeking monetary gain and public approval. As a result, non-publishing individuals entered the industry and brought in their capital, trying to be influential. For example, Ifi-Fiat attempted to purchase several Italian publishers, including Fratelli Fabbri, Etas Kompass, Sonzogno, Bompiani, and others, but failed to acquire Mondadori. Mondadori, in turn, attempted to purchase other minor publishers and succeeded in acquiring Saggiatore in 1986. Rizzoli followed a similar path and acquired Sansoni. This marked the start of an irreversible process of concentration that would impact newspapers, television, and cinema. This process led to a strong form of capitalism in Italy.

One of the most significant years for the Italian publishing industry was 1971, when the death of Arnaldo Mondadori brought about significant changes and transformations. Arnaldo was considered one of the main pioneers in the industry, and his passing caused a shift in the market. The 1980s also saw substantial changes in society, and with no one to lead Mondadori in accordance with its values, the publishing industry became more focused on economic and political strategies. This shift made production more straightforward and removed the diversity in genres that Arnaldo had tried to establish.

In the 1970s and early 1980s, publishing companies in Italy started using new technologies and adopting new organizational practices led by CEO-managers and marketing departments. The traditional role of consultants was replaced by editors, general managers, and sales managers, with the goal of selling more books and expanding distribution networks to include book clubs, supermarkets, and bookstores. The use of more aggressive forms of advertising was used to promote mainly new, seasonal products. For example, in 1981, Mondadori and Rizzoli based 75% of their production on new releases, while only 25% were books from their catalogue.¹²

This new, more commercial approach led to a shorter lifespan for books and less focus on their tradition and historical value. The rise of a "best seller" policy, which involved aggressive mass production and promotion of the author and reader, was proven to be financially beneficial. This strategy also allowed for cost savings through economies of scale. As a result, books with medium to long selling spans were now sold in short periods of time. This concept would dominate the publishing industry for decades to come.

The monthly-selling approach also had a significant impact on the overall market and played

¹² Gian Carlo, Ferretti, *Il best seller all'italiana. Fortune e formule del romanzo "di qualità"*, Laterza, Roma- Bari 1983, p.41

a crucial role in the discovery and promotion of new releases. The market was expanding and a drive towards rationalizing the publishing industry was underway, influencing other sectors such as information about bookstores and educational institutions, as well as magazines and prizes. Review articles in newspapers had a newfound weight in the market and this was a new development in Italy during this time period (1970-71). For the first time, books were being sent to newspaper reviewers before their official release, giving these reviewers the power to make or break a new book. To counteract this power, editors also took a leading role in promoting a book before its release. This change in the information and editorial process also affected the way books were chosen and marketed.

During this era, several books that were best-sellers and are still considered classics in the Italian literary landscape were published, such as Elsa Morante's "La Storia" and Umberto Eco's "Il nome della rosa." "La Storia" was a novel that was new for the author as she wrote it for a wider audience and in a more accessible language, and it sold over 600,000 copies in the first five months of its release, making it a seasonal best-seller. "Il nome della rosa" by Umberto Eco was published by Bompiani and sold 80,000 copies with its first release, with an additional 20,000 copies sold soon after. The success of this book went beyond its initial release and was propelled even further with the release of a movie adaptation in 1986, which made it a worldwide best-seller.

In contrast to the political scene between 1958-71, which was more defined and organized, the following years were marked by confusion and disarray. The gasoline crisis, the referendum on divorce and abortion, the rise of the communist party and its new role as a government force, and the increasing circulation of the weekly newspaper "Rinascita" (rebirth) from 1970 to 1974, made this period an era of reforms and struggles. Movements such as feminism, socialism, and more radical groups emerged as a reaction to the oppressive power that had been imposed in previous years. These movements found expression in different mediums such as radio, literature, and politics, and served as a means of educating the masses and spreading new information.

The publishing market in the 1970s faced the issue of concentration, leading to the creation of anti-concentration initiatives. One such initiative was the establishment of a democratic editorial league that included left-oriented publishing houses such as Einaudi, Feltrinelli, Editori Riuniti, and Zanichelli. These companies came together in Rimini in 1974 to outline the guidelines for the "League of Democratic Publishing Houses." While they shared a common left-oriented ideology, they had significant differences in terms of their company structure and values.

At the congress in Rimini and subsequent meetings, common goals and traits were identified, including the aim of being a publishing alliance that could educate the public more effectively than the government and to move forward with the "Einaudi project" to create a new society and culture. The league was also meant to be a defense that would guarantee diversity and freedom of speech and thought in terms of what was printed and distributed. The long-term strategy aimed to bring together intellectuals, trade unions, and local left-party administrations to create a democratic and anti-consumerism transformation in book publishing.

Unfortunately, the projects and the League itself were unable to succeed due to weaknesses in the publishing industry, differences of opinion and ideals within the group, and the lack of support from the left-party at the time.

The Mass Culture

During the 1970s, there was a growing debate about the role of intellectuals in society. This was in contrast to the role they played in the 1940s and 1950s, as they were now being analyzed in relation to their role as promoters of culture and spreading awareness. This was a highly creative period for publishing and resulted in a revival of poetry, which could be found not only in traditional publishers but also in smaller publishers that were publishing short book collections or magazines.

Media also saw significant changes during this time. Radio and television saw an exponential growth that was closely tied to the spread of mass culture. Just as books had played a major role in shaping culture and education in the past, these new mediums also had a diverse range of genres and roles in society. The publishing market became increasingly compartmentalized, and book production diversified, moving away from the outdated idea of "two cultures" that divided society into literate and uneducated people.

The mass production of books during the 1970s was extremely diverse, including both traditional books and modern fiction series, as well as a wide range of genres from seasonal releases to classics, news, and contemporary issues. The average number of copies sold of different book types during this time is worth noting: picture books sold anywhere from 500,000 to 1,200,000 copies per publishing house (from Mondadori to Rizzoli), while romance books sold an average of 14-17,000 copies per year. Thriller books sold anywhere from 100,000 (Mondadori) to 60,000 (Longanesi) to 30,000 copies (Garzanti) per book. Science fiction books sold an average of 35,000 copies per book at Mondadori.

During the 70s, the most significant publishing groups took advantage of the dynamic market

and increased their profits by adopting a new and updated marketing strategy. Both radio and television were used as a way to promote new releases and make advertising campaigns more effective. However, from 1976 to the early 1980s, the publishing market faced challenges due to the critical economic situation in Italy. This situation improved only in 1985, following a radical overhaul of the internal structures of book publishing companies, including savings policies, reductions in copies printed and salaries, as well as reorganizing production and distribution. As a result, larger publishing companies were able to survive, while smaller and independent publishers faced difficulties and struggled to keep up. In 1977, the top ten bestsellers in Italian production accounted for 10.4% of total copies sold, and five of them belonged to Mondadori.

The 1970s and 80s were a challenging time for the publishing industry, particularly in the area of fiction. In 1976, 26.2% of books sold were fiction, but by 1982, this had dropped to 14.2%. This decline was partly due to a strong belief among readers and publishers that books should be of high quality and appeal to an elite audience. In response to the crisis, publishers sought to create more modern and specialized novels that would appeal to the market.

At the same time, publishing houses were grappling with their own identity, as they attempted to distinguish themselves from one another. On the one hand, new managers took a more aggressive and dynamic approach, while on the other hand, readers were simply looking for good books at affordable prices, rather than books with prestige. As a result, smaller, experimental publishers struggled against the larger, mass-production oriented publishers, who took away promising writers. The big publishers' marketing campaigns were criticized for lacking balance between promoting best-sellers and new releases and debut novels, as well as not considering the interests and tastes of readers.

To address the crisis, major publishers focused on releasing less elite genres such as travel guides, gardening, and cooking books, which attracted a new wave of readers who wanted to spend their leisure time reading books without seeking an "experience." The role of editors and researchers was also being redefined, as they were no longer seen as key figures in the publishing companies.

Overall, the publishing industry underwent a period of change during the 1970s and 80s, as it adapted to the changing demands of readers and the economic situation.

During the 20th century, small local publishing houses, often run as family businesses, were a common presence. They operated in smaller towns where larger publishers were not present and often involved booksellers and editors who were one and the same. However, in the 1970s, the number of small publishers increased significantly, with 538 new ones being

established in the decade from 1970 to 1979. This was a significant increase compared to the 211 established in the previous decade and was due to a more educated population and the homogenization of major publishers. Small publishers were more focused on serving the local reader and responded to local demands, but they often faced distribution problems due to higher costs. This created an exchange between small and large publishers, with large publishers taking advantage of the research and effort put in by small publishers to find the right books for their customers. At the same time, local publishing mirrored the tendencies of society, including the rise of feminist protests in the 1980s that brought attention to social issues such as women's rights and the situation in Southern Italy.

The new approach

The 80s and 1983, in particular, were significant years for the publishing industry in Italy. The reason behind the economic crisis affecting a large part of the Italian publishing sector was traced back to the way these companies were approaching the market, which resulted in an inability to adapt to new market demands, outdated internal structures, and inefficient distribution processes. Each publishing company responded to these issues differently, leading to diverse outcomes. The concept of a "main" publisher became outdated and gradually disappeared. This caused an identity crisis for other publishing companies, as they struggled to align with either their old ideals or the approach of the pioneers of the Italian publishing economy.

During the 80s, 90s, and 2000s, the publishing industry was characterized by constant mobility with solo owners, managers, writers, and readers all in flux. In 1989, only 7-8 editors were needed to make up 50% of the extra-scholastic profit. This was possible because the major publishers were acquiring smaller companies, which became part of larger groups. For example, Mondadori fully acquired Elemond, which was already part of the Electa group (which included Einaudi since 1987) during a time of crisis. This process of concentration brought together different mediums of communication, such as television, radio, and newspaper, changing the distribution process. Labels became associated with the mediums they were advertised on; for example, Le Monnier, a branch of the Elemond Group (Mondadori), was primarily advertised on television and was always known as a TV-related label.

The impact of the multimedia process led to centralization, with two main groups, the Repubblica-Espresso group owned by De Benedetti and Berlusconi's Mondadori and

newspapers, in control of the entire Italian publishing and distribution system. They also owned the major Italian broadcasting companies. This dominant role of the multimedia process had a significant impact on the independence, identity, and diversity of the publishing industry at that time.

In the past, the policy for book publishing was centered around the duration of production, distribution, and marketing of a book, with a focus on seasonal releases, occasional readers, and a shorter average lifespan of a book, resulting in a decrease in book quality. According to Istat and other sources, from the 1980s to the 1990s, new releases grew by 115.8%, and the reprint by 64.7%, and from the 1990s to 2001, new releases made up 60-63% of the total production. The policy of releasing new books seasonally and having the same major publishers dominate the book rankings and literature prizes was a typical industrial approach that prioritized a few titles over many, shortening their lifespan and relevance.

The real turning point in the 1970s was a shift in book production from a focus on literature to one that emphasized promotion, entertainment, non-fiction, and mass-market bestsellers, rather than the ideal of a "quality" book. A social phenomenon that influenced the new releases policy was the growth of a diverse occasional reader population from the 1980s,¹³ making the typical reader's role and interests less defined and less of a reference. This led to an increase in new releases and a more diverse offering to meet the growing demand for books. The result was a repetition of sub-genres with seasonal releases and contemporary non-fiction, perpetuating the idea of "fast-books" with cheaper mass-market editions that are appealing due to their focus on quantity. These new productions aimed to provide a longer lifespan for books and cater to a reader that is not part of the elite, but it is worth noting that the first edition, which is not part of the mass-market, still sells more than twice as many copies compared to the cheaper reprints.

Finally, there has been a shift in the publishing industry from the concept of book series to a focus on promoting single book titles. Marketing efforts are now focused on making standalone products just as appealing, if not more so, rather than being inspired and driven by the idea of being part of a book series. This change has further diversified the book publishing landscape and catering to the ever-changing reader demographic.

The image of the book

¹³ Giuliano Vigini, *Rapporto 1993 sullo stato dell'editoria libraria in Italia*, in *Catalogo degli editori italiani 1994*. Editrice Bibliografica, Milano 1993, pp. XI-XXVI

The focus of book publishing in the 80s and 90s was on mass distribution and seasonal releases, with little emphasis on reprinting and cheaper editions. The media and television approached books in two ways: either as a way to get an article or to pair it with interviews for a movie release, anniversary, etc., or as a scandal or literary case, searching for gossip or something that could detract from the book.

As a result, the focus shifted away from the plot and structure of books and became more about giving the book and its author a personality. The author's background and story became important to promote the book and create a successful marketing campaign.

Informative and educational book reviews became less prevalent, replaced by a focus on making a book popular through the medium of advertising. For example, the sales of Dante Alighieri's "Divina Commedia" skyrocketed after Roberto Benigni made a commentary and interpretation on TV in December 2002. With the rise of the internet and forums and websites, people relied less on professional book reviews and instead relied more on the hype generated on the web.

The public image of books and authors as characters had different effects on the market. The writer or intellectual now had an additional role of being a promoter and testimonial for their own product. The reader was also considered part of a higher-class group entitled to luxury products like champagne and Strega (which was already a literary prize). According to Censis analysis, books were still considered a luxury for only a few people during these years, and were a symbol of a highly educated reader.

In 2002, about 45-50 million new books were distributed as a promotional gift with newspapers. However, according to a research conducted by Aie-Demoskopea, only 500,000 of these books were actually purchased by individuals who had no prior interest in reading, and could be considered new readers. Despite the ease of distribution, it was still a challenge to attract and retain new readers.

During the 1980s and 1990s, new technologies and marketing strategies were introduced, including the inclusion of foreign authors and publications. Despite these efforts, the Italian market remained small. Newton & Compton, a smaller publishing company, responded by introducing a strategy of selling inexpensive books and promoting them through word-of-mouth. This approach quickly gained popularity and was adopted by Mondadori, which published bi-weekly editions of "Miti." The first four titles sold 700,000 copies in two months and paved the way for further editions from Mondadori. This shift from more expensive first editions to cheaper releases led to an increase in readership from 36.5% to 46.5% between 1973 and 1984. However, by 1999-2001, the percentage of readers had decreased to 38%-

40.9% according to Aie and Ocse. These statistics suggest that price was not the only factor affecting reading habits.

According to Studio Livingstone, the rise in sales in 1995 could be attributed to the same individuals buying more books at a lower price, or to occasional readers who were not truly interested in reading. The root cause of this trend was illiteracy, which remained a significant issue in 1999-2000, as well as ineffective marketing campaigns.

The idea of buying and reading books underwent significant changes in the 2000s due to the increasing popularity of television and the internet. The shift towards fast-paced media, such as television, made it difficult for books to compete. People were looking for something easily shareable and impactful, whereas books and their marketing strategies in Italy were the opposite. The transition from regular readers to occasional readers reflected a shift towards impulse purchases, with buying decisions being made on the spot, often without much prior research. For example, a reader might buy a book while shopping at a supermarket or department store, without necessarily seeking out a specific bookstore.

The fragmentation

As the media becomes more focused on the production aspect and standardized communication and promotion of products, we see a growing diversity among publishing companies. As a result, books become a key area of focus as they become more diverse in terms of literary languages and genres. The promotion of books is dominated by radio and television, leading to a transformation from written paper to something more adapted to these new forms of consumption.

This new way of promoting and popularizing products leads to a growing diversity in distribution, with specific categorization between old and new structures. From small town bookstores that specialize in specific genres, to book fairs and secondhand events, and from cinemas to bookstores, the industry has evolved to today's virtual bookstores. The process of buying and reading books has transformed from a linear buyer-place-reading to a multimedia or multiple process, where a variety of products are consumed in a variety of places that hold the same value.

However, during this period, a striking and alarming distinction has become clear between an upper class that is more consumerist, used to reading and consuming information through different mediums, and a lower class that exclusively gets its knowledge and information through television.

Rizzoli and Mondadori: group dynamics

In the aftermath of the 1984 crisis, Mondadori regained its dominant position in the Italian publishing market by acquiring other Italian publishers and making international decisions for the book and newspaper industries. With a focus on reaching a wider audience, Mondadori's book collection "Ingrandimenti," established in 1982, continued to gain popularity for its emphasis on contemporary issues that would engage even the average reader, covering topics such as politics, medicine, sports, and journalism.

Between 1980 and 1990, we saw the downfall of Rizzoli as an independent publisher, and the group Rcs became fully defined. After paying off their debts, the publishing company still struggled, with "La Repubblica" temporarily overtaking "Corriere della Sera" in 1986 with 500,000 copies compared to 480,000, thanks to a prize game called Portfolio. However, a new financial crisis hit the book market from the late 80s to the first half of the 90s. This crisis was due to two reasons: fraudulent reporting of copies sold through subscriptions and overproduction of copies. As a result, many deals were made with foreign groups in different departments of the publishing market and television, while acquisitions in Italy continued. In particular, "Rcs Libri" later covered the entire range of products on paper and electronic devices. It is worth mentioning that Rizzoli bookstores were given to Feltrinelli, as they were no longer considered strategic.

As a result, BUR editions became even more divided into specific sub-genres, with new releases and reprints. These sub-genres included genres and sub-genres, classics and contemporary novels, encyclopedias and dictionaries, and products for bookstores and kiosks, each with different graphics and editorial work. With high sales reaching 300,000 copies. Publishing companies such as Mondadori, Rizzoli, and to a lesser extent Bompiani, reflected general trends in the Italian non-fiction landscape during these two decades. There was an increased drive for acquisitions and an increased interest in new non-fiction releases, especially from smaller publishers and publishing houses during the 90s. This revival of the "debut author" policy led to significant results, with a focus on standalone products in contrast to the book collections of the 80s.

In this phase, the promotion strategy was increasingly focused on short-term success, with television playing a key role. Television had become the main source of information for the people of Italy, and for an author, and particularly for a journalist-author, it was relevant on two levels. Firstly, the immediate impact of a launch that was seen on TV could have a significant impact. Seeing a book featured on specific shows and hearing a specific host talk

about it was more impactful and relevant to the public than any other form of promotion. Secondly, the familiarity effect - the emotional connection we feel watching a video on screen or a picture - was strengthened, especially through talk shows and news, for many journalist-authors.

The 80s were characterized by a nearly duopolistic situation between the two main players in the industry, leaving little room for other publishing companies. The fight between Rizzoli and Mondadori and their respective releases was primarily between the traditional and main authors of each company. Additionally, the rising interchangeability of authors and editors, along with the general impolicy of the phase, led to the almost complete fall of political connections that might still have been possible during 1976-80. Books about political figures were now being published without caution, as the main source of income and prestige came from television and other forms of promotion, with the figure of a host and journalist-author being the most important in determining sales and relevance.

Einaudi's Stile libero

The financial instability of Einaudi due to poor management and reliance on banks caused significant problems, which were compounded by its acquisition by Electa and later Elemond in 1983. Despite this, Einaudi was able to maintain its fundamental values and high standards, but lost its status as a core player in the political arena of that time.

In 1988, Einaudi published a collection of short essays called "Saggi Brevi", which was well received for its high-quality authors and diverse range of topics. This collection lasted for four years and included works such as "Sulla Fiaba" by Italo Calvino, "Il Kitsch" by Hermann Broch, and "Rustici e buffoni" by Piero Camporesi.

The Einaudi Library, which took over Einaudi Paperbacks and Studio Library in 1997, played a vital role in preserving the diverse range of genres and authors in the Einaudi catalogue. The Little Einaudi Library also evolved to include both monographic and general works, while still upholding the quality and prestige associated with the Einaudi brand. In terms of contemporary literature, Einaudi continued to publish works by its established authors while also embracing new and experimental styles, including poetry and non-fiction by both Italian and international authors. This expanded the Einaudi catalogue even further.

Adelphi: from the project to the anti-project

Adelphi Publishing House was one of the few publishers that were minimally impacted by the market crisis of the early 80s. This was due to two main reasons. Firstly, Adelphi focused

on foreign literature that was less affected by the crisis. Secondly, Adelphi was in line with the changes happening in Italian society and culture at the time. It had a strong individualistic approach and a non-ideological stance towards spiritual themes, which allowed it to double its title production from 1985.

The success of Adelphi can be largely attributed to the publication of "The Unbearable Lightness of Being" by Milan Kundera. This book had already been published by Mondadori and Bompiani without much success. Adelphi, however, made a proposal to the author to publish the book and re-edit all of his past works. Adelphi also heavily advertised the book through television programs that targeted its intended audience, further boosting its success. The publication of "The Unbearable Lightness of Being" became a defining moment for Adelphi, as it cemented its position as a dominant publisher in the non-fiction essay genre during the 80s and 90s.

Adelphi continued to produce quality pieces by publishing authors who originally belonged to Mondadori or Rizzoli. The publishing house re-edited their works and made them its own original products. A prime example of this is Georges Simenon, who was once identified as a "giallo" (detective story) when he belonged to the Mondadori group but became "an Adelphi" after his works were re-edited by the publishing house. Adelphi maintained a strong brand image that was associated with intellectual and educated readers but was not exclusive. This was due to its choice of titles, which allowed a wider range of readers to identify with its vision.

Adelphi's success was largely due to the direction of Roberto Calasso, who served as the executive director since 1971 and managing director from 1999 to 2021. He took over from Roberto Bazlen and Luciano Foà, the founders of Adelphi in 1962. Calasso wanted to take Adelphi in a completely different direction from Foà's admiration for Einaudi. As a result, Adelphi moved from being an open project to an anti-project. Calasso viewed literature and the reading experience as absolute, and historical matters were secondary. This detachment allowed him to publish authors with strong opinions and works focused on themes that were relevant to the historical context of the time. Additionally, Adelphi made several editorial choices that helped affirm its position as one of the leading publishers in the Italian market. It stressed its brand image and concept and made intentional choices such as only mentioning Adelphi editions and disclaiming first editions from other editors, thereby emphasizing its exclusive and direct relationship with its readers.

E/O transeuropa and Theoria: looking for new books and authors

In the 80s and 90s, there was a surge in the number of new publishing companies in Italy, especially those that were focused on a more local and intimate scale. During these years, one of the main challenges for these companies was to make their debut authors, mainly Italian, relevant and distinguishable from well-known foreign writers. The traditional approach of linking less known authors with more mass-consumed literature was no longer effective, as the mobility and diversity of the time made it possible to find high-level authors, appealing to the more educated reader, among new releases from smaller publishing companies. This posed a risk, as there was a chance of releasing many copies of a book that was not worth the effort, due to the cultural changes happening at the time. These challenges were particularly important to consider because the logistics and production part of the publishing process was still crucial to the success of small family-business type companies and the rising number of these businesses would have a larger impact, not only on these small companies, but also on bigger companies.

The most important small publishing companies of the 80s and 90s were Theoria, Il Lavoro Editoriale of Transeuropa, and Edizioni e/o for foreign literature. Edizioni e/o was founded in 1979 by Sandro Ferri, a former philosophy major, and his wife Sandra Ozzola, an expert in Russian literature. The company's goal from the beginning was to specialize in contemporary literature from Eastern-European countries that was largely unknown in Italy. Over time, the company expanded its focus to other types of literature, as the name e/o could stand for "east / west" or "and/or". The "Est" collection, curated by Sandra Ozzola and Hungarian literature expert Alfredo Lavarini, featured authors like East-German writers Christa Wolf and Christoph Hein and Polish writer Kazimierz Brandys. In 1988, the "Ovest" collection was created, dedicated to North-American and Irish literature with authors like James Joyce, Carol Oates, and Edna O'Brien. In the following decade, the collections were unified under the name "Dal Mondo" and the search for new authors expanded to the Mediterranean area with writers like the Israeli Benjamin Tammuz and Italian authors like Massimo Carlotto. This led to the creation of the Noir collection in 1988, which was launched by Algerian writer Mohamed Mulessehul under the pseudonym Yasmina Khadra. From the 90s, Edizioni e/o expanded its focus to Italian non-fiction with authors like Sergio Lambiase and Elena Ferrante. With its focus on contemporary literature from all over the world, Edizioni e/o has built a high-quality catalogue that is comparable to bigger companies like Adelphi. Some of its best-selling titles include "Cassandra" by Christa Wolf with over 100,000 copies sold and other titles from Hrabal, Hein, and many others that frequently sell over 20,000 copies. Edizioni e/o is a unique case in the small publishers' panorama, with a strong cultural project,

editorial instincts, and a handcrafted structure paired with a business-making ability. This identity is also strengthened by a cohesive graphic choice by Sergio Vezzali, who created the stylized stork that represents the publishing company's logo.

Il Lavoro Editoriale was founded in 1979, and in 1986 it launched its Transeuropa collection. This collection quickly moved towards an independent approach, focusing on new authors and publishing non-fiction essays on topics such as biology, cinema, and criticism. In 1999, Transeuropa officially left Il Lavoro Editoriale and joined Costa & Nolan and Theoria.

Transeuropa aimed to become a landmark for the younger generation in Italy, particularly during the 1970s, which had developed a unique and individual literary taste. The company highlighted this aspect through its use of pop-art inspired covers with provocative slogans. However, this approach was not enough for the company to establish a strong presence in the publishing industry.

Theoria was founded in Rome in 1982 and started its publications the same year. The company had an ambitious project, inspired by the Einaudi ideal, to build a catalogue that brought together different disciplines in organic collections. The first collection, Segni, had authors such as Galileo, Poe, and Dickens, and was aimed more towards the humanities and science. The Riflessi collection was dedicated to fantastic and detective stories and had authors such as Freud. The collections Confini, Letterature, and Geografie reflected on contemporary matters. With Letterature and Confini, Theoria moved along lines that would shape the editorial landscape of the 1980s and 1990s, paving the way for authors like Zhon Acheng, Yoram Kaniuk, and Tahar Ben Jelloun, which would later benefit larger companies. Theoria's success was due to its positive atmosphere, its deep research to find new talent, and its diverse group of young authors. However, the Theoria project failed due to internal problems and financial difficulties, and after a crisis in 1993, the company lost a significant part of its experimental approach.

An unstoppable movement

At this point, we can take a closer look at some of the major types of publishing companies that have been significant in the Italian publishing landscape over the years. The first group of publishers can be described as paradoxical, as they struggle to establish a productive relationship between research, literary and intellectual innovation, and the efficiency of the company's administration and logistics. Although these publishers have made a significant contribution to cultural development and societal progress, they have also experienced severe financial crises that have hindered their longevity. Examples of these publishers include early

stage Saggiatore, Bompiani, and Feltrinelli, as well as smaller publishing companies.

The second type of publishing company is characterized by a more industrial approach, heavily relying on their financial side. These companies used part of their capital for non-editorial activities such as acquiring other publishing companies and releasing products that were not related to books in order to diversify and expand their market. However, this led to a loss of identity and difficulties during the acquisition process and the transitional periods.

This type of company only stabilized by the end of the 1990s.

The third type of publishing company is based on the connection between success and quality, season and duration, entrepreneurship and culture. These publishing companies have worked to establish a new identity and build everything around the assumption of being iconic, with a focus on quality and elite products. This is what Einaudi and Adelphi did previously and what modern Feltrinelli has done since the year 2000.

It is important to understand and contextualize these different types of publishing companies within the historical period and cultural aspects of those years. The approaches used by each group were unique and irreversible, and their effects could only be seen in the long term. It is crucial to consider the cultural and historical context of each publishing company in order to fully understand their significance in the Italian publishing landscape.

Chapter 3

The publishing industry during Mussolini's censorship

The opposition to suppress

Once Mussolini came to power in Italy, he began to shape the country's culture to align with his Fascist ideology. In the publishing industry, his focus was primarily on newspapers, rather than books. To have full control, he assigned Cesare Rossi, one of his trusted men, to the Press Office of the Minister of the Interns, which was later renamed the "Press Office of the Head of the Government" and placed directly under Mussolini's control. Under Rossi's leadership, the government implemented strict laws to suppress any opposition and control the flow of information.

One example of Mussolini's censorship was in Turin, where he targeted a young and charismatic anti-fascist intellectual named Piero Gobetti. In 1922, at just 21 years old, Gobetti was already a well-known voice in the anti-fascist movement. He founded "La Rivoluzione Liberale" magazine and later established his own publishing house, the "Piero Gobetti"¹⁴, with the goal of making it a hub for anti-fascist ideas. Many intellectuals, including Luigi Einaudi, Giuseppe Prezzolini, Gaetano Salvemini, Natalino Sapegno, and Giovanni Ansaldo, joined Gobetti in his efforts.

In an attempt to expose the illiberal and violent roots of the movement, Gobetti openly challenged the fascist institutions. He encouraged his companions to be prepared for persecution and to consider themselves a "companionship of death". Unfortunately, his prediction came true as he did not have to wait long for the inevitable crackdown by the fascist regime.

The Piero Gobetti Publishing House had a rich history of prestigious collaborations in both politics and literature. Political figures such as Giovanni Amendola, Francesco Nitti, and Don Luigi Sturzo contributed to the political aspect of the publishing house. In the literary field, the most iconic piece was "Ossi di Seppia", *Cuttlefish Bones*, by Eugenio Montale, which would later become the manifesto of the fascist resistance. Gobetti was highly dedicated and committed to his cause, and in just two and a half years, his publishing house produced nearly

¹⁴ Guido Bonsaver, *Mussolini censore, storie di letteratura, dissenso e ipocrisia*, Editori Laterza, Bari 2013

one hundred volumes. Despite the attention he received from the fascist regime in Rome, led by Mussolini, Gobetti continued to grow his anti-fascist center. On March 8th 1923, a telegram was sent ordering Gobetti's arrest, but the accusations were weak.

The Matteotti crisis in Italy marked the end of freedom of opinion and speech, but Gobetti was able to anticipate this change. In July 1924, following Mussolini's decision to use two decrees to halt all publishing activities without warning, Gobetti wrote an article suggesting a more discreet approach to resistance, which would have a better chance of survival.

Unfortunately, Gobetti was targeted by violence on September 5th, 1924, as he had been warned of the danger.

In February 1926, Gobetti relocated to Paris to explore the possibility of recreating his activities abroad. However, his goal was not just to recreate what he had done in Italy, but to appeal to the French public with pieces that focused on European culture, without necessarily having Italy as the main focus. Unfortunately, Gobetti's disregard for his physical health proved fatal, and he passed away on February 15th, 1925. Mussolini was relieved of one of the sharpest voices of anti-fascism, but Italy lost someone who could have had a significant impact on the evolution of Italian politics.

Another notable publishing house was founded by Giuseppe Monanni and Leda Rafanelli, who were followers of anarchism and libertarian socialism. In 1909, they established their own small publishing house, specializing in translated foreign books, mostly fiction and political-philosophical non-fiction. The catalog of their "Libreria Editrice Sociale" (Social Publishing Bookstore) included works from influential anarchist leaders who had a profound impact on Mussolini's younger years, such as Louise Michel and Pëtr Kropotkin. Despite surviving the economic depression in the post-war years, the Monanni publishing house faced challenges with the rise of fascism and Mussolini's censorship.

During the establishment of the dictatorship, most publishing houses leaning towards communism and socialism faced cruel clashes with Mussolini's censorship. Giuseppe Monanni was no exception, and between the end of 1925 and the following Autumn, he was also under fire. On April 26th 1926, the police informed the authorities in Milan about a significant number of banned books coming from New York and sent to the Casa Editrice Sociale. The police conducted a search on June 12th, and 629 copies of an anarchic book by Errico Malatesta, "Vita e pensieri", Life and Thoughts, were seized. Around the same time, another socialist publisher in Milan, Libreria Editrice La Cultura, *The Culture Publishing Bookstore*, , faced a similar situation, with hundreds of books confiscated despite the publisher's formal opposition.

The story of the Libreria Editrice La Cultura is one of ups and downs, in a time of political turmoil and censorship in Italy. The publishing house unfortunately went out of business by the end of the year. However, its founder, Giuseppe Monanni, attempted to keep his publishing endeavors alive by changing the name of the company to Casa Editrice Monanni. Despite this rebranding, Monanni still faced challenges and conflicts with the authorities. On December 19th, 1926, the police conducted a second search on Monanni's publishing house, resulting in the confiscation of more works that had been released under the previous name. The police had been alerted by the shipping of anarchic pamphlets to a private address in France. While the sources are not clear on whether or not Mussolini was directly involved in these confiscations, it is highly unlikely that he was not at least informed about the situation. As the dissolving of political parties opposing the Fascist regime continued, Monanni was forced to stop publishing his anarchic materials. However, he found a way for the publishing house to survive by paying for collaborationism. He was able to keep in the catalog some novels from foreign writers with socialist leanings, which were never banned and could be regularly distributed.

However, the situation changed once again when a telegram was sent to all local authorities in Italy informing them about the sale of American and Russian books with subversive content for low prices, and the fact that these books were being used by anti-fascist groups for education purposes. The telegram may have been taken too seriously, as the minister soon sent another telegram to have a less restrictive approach to avoid damaging the publishing industry. This change may have been influenced by influential publishers or bookstore owners who were directly connected to Mussolini and complained about the strict approach.

Furthermore, papers belonging to Mussolini's secretariat showed that Monanni had a direct connection with the dictator. In a letter from June 1st, 1931, the Milan prefecture responded to Monanni's complaint about a confiscation, explaining that it was only for one bookstore in Bari and was prompted by the suspicious titles of the novels in question. Two years later, on May 3rd, 1933, Monanni again complained to Mussolini about the confiscation of three novels released by Casa Editrice Monanni. Sadly, no documentation or memoirs from those involved in the situation have provided a clear explanation for why the publishing house stopped its activity later that year.

Additionally, the police were once again alerted about problematic works by Monanni's publishing house. This time, the alarm was raised by an official of the Fascist Militia that reported on March 1st, 1933, about an investigation conducted in Emilia. The report stated that novels written by Monanni were found in the homes of anti-fascist suspects. The content

of the novels was not only anti-fascist but prophetic, as the original novel in English, published in 1908, predicted the rise of dictatorship in a democratic state as a reaction to the possibility of socialist revolution. It's noteworthy that the novel did not raise any suspicion during its original release in 1925, its reprint in 1928, or its new edition with Monanni's stamp. It is possible that Mussolini or the Milan Prefecture warned Monanni to stop his activities or face arrest, forcing him to halt.

A memorandum dated January 29th, 1938, discussed Russian and American fiction that was serving as inspiration. Works by Maksim Gor'kij and Jack London were mentioned specifically, including "The Mother" (1906) and "The Spy" (1908) by Gor'kij, and "The Iron Heel" (1908) by London. Despite not being active in 1933, works by the Casa Editrice Monanni were still available in bookstores and street markets throughout Italy.

The publishing industry

Although Mussolini aspired to create a fascist society, he showed little interest in nationalizing the economy or the cultural industry. In the publishing sector, after suppressing the opposition's most problematic voices, he focused on strengthening relationships with those editors who had been loyal and supportive during his political campaigns and rise to power. Arnaldo Mondadori, for example, could be considered a staunch supporter of the early stages of fascism. From his printing press, he distributed large amounts of propaganda flyers supporting fascist exponent Italo Bresciani as early as 1919.

Mondadori first met Mussolini in Milan at the Albergo Corso in 1919-1920. The editor later reminisced about this meeting in a conference in the 1950s. It is well known that Mussolini held a particular admiration for Lombard poet Ada Negri, whom Mondadori brought to his publishing company in 1921. Her first publication with Mondadori was the autobiography "Stella Mattutina," which Mussolini mentioned in the newspaper "Popolo d'Italia." This marked the start of Mondadori's political journey with the fascist dictator.

Before this, Mondadori was a member of the socialist party, and one of his publications in 1907 supported an anarchic-socialist magazine named "Luce!" However, in the early post-war period, he had no doubts and supported the rising fascist movement. During Mussolini's most powerful years, Mondadori's support for fascism became even more important, as evidenced by his acquisition of the Milan-based newspaper "Il Secolo" in 1923, in agreement with the company's most important shareholder, Senatore Borletti.

Over time, Mondadori's enthusiasm for fascism became increasingly instrumental, and he became known as the "incantabiss," or the "snake charmer," for his ability to win the favor of

any new power holder. In fact, it was this type of relationship with Mussolini that made his case so interesting. Despite declaring his faith and devotion to the regime, Mondadori continued to release works that proved successful in terms of sales, even when their writers or content were openly opposed to fascist values and guidelines. From this perspective, one could argue that Mondadori's collaboration with Mussolini and the regime was not coerced or consensual, but rather "interested."

Some of the anti-fascist writers edited by Mondadori include Virgilio Brocchi and Giuseppe Antonio Borgese. Borgese, in particular, with his novel "Rubé" released in 1921, was established as one of the most prestigious critics and writers of his generation. Using his "incantabiss" skills, Mondadori was able to sign Borgese for a collection of poems first, and then his second novel, "I vivi e i morti"¹⁵ in 1923. Mondadori's direct collaboration with Mussolini took the form of several editorial initiatives. The first recorded instance was on March 17th, 1923, when Mondadori wrote to Mussolini about his intention to launch an illustrated newspaper, "Annali d'Italia," that would document fascism's achievements in the most perfect way. Mondadori declared that he would refuse any government support and even offered to share the profits with the National Fascist Party. In return, Mussolini helped Mondadori with important financial matters. For example, in November 1928, Mussolini directly assisted with a re-financing plan for the publishing company. Overall, the relationship between Arnaldo Mondadori and Benito Mussolini was a complex one, marked by both mutual support and exploitation. The collaboration between Mondadori and Mussolini took place through several editorial ventures. The earliest record dates back to March 17th, 1923, when Mondadori wrote to Mussolini saying he was fulfilling a promise to launch an illustrated newspaper, "Annali d'Italia," to showcase the achievements of fascism in the most comprehensive manner possible. He stated that he would refuse any government support and even offered to share the profits with the National Fascist Party. Despite this, Mondadori benefited from Mussolini's assistance in important financial matters. For instance, in November 1928, Mussolini personally aided a re-financing plan for Mondadori Publishing. Arnaldo Mondadori, the enterprising editor, once described his publishing business as an "outstanding weapon that the regime will be able to use for every further development of the already in progress programs" to Mussolini. His company, which had the production of books in different regions of Italy, quickly became dominant across the whole peninsula a few years later in 1936. During that time, Mondadori was able to have the hierarchs of fascism publish

¹⁵ G. A. Borgese, *I vivi e i Morti*, Mondadori, Roma - Milano 1923

their memoirs with his company and offer a generous contract to the most prestigious writer of Fascist Italy, Gabriele D'Annunzio.

The correspondence between Mussolini and Mondadori shows many attempts from Mondadori to secure a deal with Mussolini for the publishing or re-printing of one of his works. The Italian version of Mussolini's autobiography, released in English in 1928, was highly desirable due to the potential profits it could bring. However, Mussolini always denied the possibility of an Italian edition. Despite this, Mondadori was able to release an interview with Mussolini by Emil Ludwig, which gave his company visibility and profits.

In the spring of 1932, Mussolini agreed to be interviewed by the famous German biographer Emil Ludwig, even though he was a Jewish intellectual with clear democratic ideologies. The reason behind this agreement might have been the rising popularity of Adolf Hitler. After the interview, Mondadori quickly reached an agreement over the translation rights and the book was translated into thirteen languages. When the biography was sent to Mussolini for review, he approved the text with minor edits and authorized the Italian translation. The book, "Colloqui con Mussolini," had its first release and became a bestseller.

However, Mussolini was not fully prepared for the honesty of some of the statements he made during the interview. Arnaldo Mondadori himself was surprised by the frankness of some of the statements and asked for a review with the secretary of the Duce, but found out that everything stated was intentional and that Mussolini had no intention of editing anything out. Despite this, Mondadori had incontestable evidence of Mussolini's agreement, as he had the draft edited firsthand by the Duce himself. This forced Mussolini to reach a compromise and agree that the first release was not going to be heavily advertised and there would not be any reprint.

Despite the communication with Mussolini and the interest that Arnaldo Mondadori had for works connected to fascism, it would be incorrect to think that his motivations were political. The presence of anti-fascist authors like Brocchi and Borghese and the freedom with which Mondadori chose his writers are examples of this. The selling potential of a book was far more important to Mondadori and Luigi Rusca than its political alignment. This is demonstrated by the publication of E. M. Remarque's novel "Im Westen nichts Neues (Nothing New on the Western side)," which Mondadori bought the publication rights for in Italian, despite facing opposition from Mussolini due to the novel's pacifist and antimilitary themes. Mondadori's frustration only grew when he found out about the new release of another German novel about the Great War, "Krieg (War)," by Ludwig Renn, published by his biggest competitor, Treves.

On October 2nd, 1929, Mondadori wrote a letter to Mussolini requesting permission to publish Remarque's novel. He followed up two days later with an urgent telegram, mentioning that 25,000 copies of the French edition were already sold in Italian bookstores. However, his request did not receive the response he had hoped for. A document from Duce's office shows that four days later, the translator of Renn's novel (Paolo Monelli) wrote a letter to the Duce complaining about the withdrawal of authorization to publish "Guerra."

Mondadori tried again and informed Mussolini of his invitation to collaborate on an Italian translation project for Remarque's novel for the Swiss and South American markets. The reply was marked with the words "negative answer" twice. To persuade Mussolini, Mondadori used the argument of potential profit loss for an Italian company, saying he learned that a Swiss publisher had the rights to an Italian translation of the novel.

In a meeting with Mussolini on April 23rd, 1931, Mondadori attempted to gain permission for the publication. Bragging about his German language skills, Mussolini asked for an original copy of the novel. Mondadori promptly provided it, but when he later asked for an update, he was told to send the Italian translation of the novel. This had not been ordered yet, so Mondadori instead sent a brief signed presentation expressing his admiration for the novel and critiquing the "fascist ideality of the patriotic war." Despite this, Mussolini still denied Mondadori's request to publish the novel.

However, despite initial obstacles, it seems that Mondadori eventually succeeded, as copies of "Via del Ritorno"¹⁶ printed in 1932 by Mondadori can still be found in libraries like the Biblioteca Nazionale in Florence.

Mondadori's attempts to win over Mussolini were often humorous. One such effort was to persuade Mussolini to write the preface for a biography of Lenin by Romanian historian Valeriu Marcu. Despite Mussolini's refusal, the book was published in 1930 under the title "The Drama of the Bolshevik Dictator." The censorship's reaction was also strange. The book was finally released two years later when the Minister of the Interior was confident that order was established within the regime, and all copies of the French or German translation were confiscated.

Mondadori was known for his capability of "normalizing" works that were considered politically inconvenient, and he made sure that Mussolini was aware of his diligence in self-censorship, which was a common practice for publishing companies. However, during the

¹⁶ Guido Bonsaver, *Mussolini censore, storie di letteratura, dissenso e ipocrisia*, Editori Laterza, Bari 2013 pp. 51

war years, the regime's restrictions on translated foreign works made it difficult for Mondadori to maintain popularity among readers. In 1941, he managed to lift the ban on a collection of short stories by John Steinbeck, "The Pastures of Heaven." However, the restrictions on paper usage soon became a common excuse for the drastic reduction of foreign translations.

Despite the challenges, Mondadori was able to keep their most popular comic, "Topolino" (Mickey Mouse), alive. The weekly comic was based on the Walt Disney character and was in danger of being discontinued in 1938 when the Minister of Popular Culture imposed a reduction of foreign comics. In March 1941, the Minister attempted to suppress the three pages featuring Mickey Mouse, but Mondadori fought back until the US joined the war and the comics seemed to be doomed. In February 1942, a compromise was reached, and instead of featuring Mickey Mouse, the Italian edition portrayed the adventures of another fictional character.

Centralisation: 1934-1938

The black man on the magazine cover

Mussolini played a critical role in the press censorship during Fascism, as everything that was to be published had to be approved directly by him. This led to a significant change in censorship when a controversial novel, *Sambadù, amore negro* (*Sambadù, nigger love*), written by journalist and writer Maria Volpi under the pseudonym Mura, caused an uproar. The novel was released in serial form in a weekly magazine, "Lidel," but it was the full version published by Rizzoli that caused a stir. The novel was initially released in April 1930 and was shorter by a third, ending with a controversial wedding between a young African chieftain's son and an Italian widow.

Four years later, the extended version of the novel was published as a supplementary volume in the popular illustrated magazine, "Novella." The cover featured a black man dressed in western attire holding a white woman in his arms. It's not clear how Mussolini got hold of the magazine, but it's believed that the head of the police brought it to his attention. The incident was recorded by Baron Aloisi in his diary and was published in French after the second post-war period

2 Avril. – A 11 heures chez Mussolini. Il était très contrarié d'une publication, *Amour noir*, qu'on a fait retirer de la circulation. Il s'agit des amours d'un Italien avec une négresse. Inadmissible de la part d'une nation qui veut créer en Afrique un empire.¹⁷

It's probable that Mussolini didn't read the novel. If he had, he would have approved of its ideology, which reinforced white supremacy, in line with Fascist beliefs. The problem was the cover, which depicted a sensual scene with a white woman in the arms of a black man. This was done to attract attention and increase sales, but it was not cautious enough in regards to race. The book was planned to be sold in every newsstand in Italy, but the racial matter on the cover caused controversy.

During the weeks leading up to the Ethiopian invasion, Mussolini was particularly sensitive to the idea of interracial relationships. This is why the release of *Sambadù*, a sentimental novel featuring a relationship between an African man and an Italian woman, was so controversial. When the full version of the novel was released by Rizzoli, complete with a cover illustration that depicted the African man in a sensual embrace with the white woman, it set off a chain of events that would lead to significant changes in the censorship laws of Fascist Italy.

On April 2nd, 1934, Mussolini came into possession of the magazine featuring the novel and was reportedly upset by the cover illustration. It is not entirely clear how he came across the magazine, but it is believed that the head of the police brought it to his attention. The following day, every copy of the novel was seized and Mussolini made significant changes to the censorship laws. Under the new laws, every editor or printer was required to submit three copies of their publication to the Prefecture before it could be released, exposing them to the risk of having their entire print run blocked. This led to editors being more cautious in their publications, seeking forms of approval before releasing anything.

The change in censorship laws also affected the activities of the prefectures, which saw an intensification of their efforts. According to the Minister of the Interior, in the first three months of 1934, only three volumes were banned, all of which had been released abroad. In the two months following the new circular, the number of banned books rose to 13, and between April 1934 and August 1935, a total of 260 books were banned, with an additional 74 volumes requiring editing and cuts.

The genres of literature most affected by the new censorship laws were romance and Catholic books, which saw some cuts imposed. This showed a veiled distrust towards the Vatican on

¹⁷ Baron Aloisi, *Journal*, Plon, Paris 1957, p. 185.

Mussolini's part, particularly after the Lateran Treaties in 1929. In addition to anti-fascist works, there were also some pro-fascist works that were banned due to their poor taste and style. This censorship marked a turning point for the control of the press and publishing industry in Fascist Italy, and its effects were far-reaching.

Dissent, but not too much.

In the 1920s, while the publishing house Arnoldo Mondadori was growing with the rise of Fascism, several other prestigious publishing houses were also established. Bompiani and Einaudi, for example, were founded in the early 1930s. Valentino Bompiani started his publishing career under the tutelage of Arnoldo Mondadori, where he was hired in 1922. He quickly gained the trust of his employer and became responsible for the non-fiction works of foreign authors. In 1928, he took the opportunity to move to the publishing house Unitas in Milan, which served as a stepping stone for his career.

When it came to the Fascist regime and Mussolini, Valentino Bompiani was always careful to have the approval for his projects to ensure government funding. Some cases of censorship, such as the anthology by Elio Vittorini, *Americana*, helped to create the image of a hidden anti-Fascism that was stronger than it actually was.

When Arnoldo Mondadori was approached as a possible publisher for the Italian release of *Mein Kampf* by Adolf Hitler, he declined the offer, as he believed that such a long and wordy book would not have a large audience in Italy. However, when Valentino Bompiani received the proposal in July 1933, he saw it as an opportunity for a direct collaboration with Mussolini. The translation started without hesitation, and after multiple requests, Hitler agreed to write a special preface for the Italian edition. In March 1934, *La mia battaglia*, *My Fight*, was released in Italy. It was not the complete edition of *Mein Kampf*, but rather only the second part of the book, which contained the political manifesto of the National Socialist leader, while the first part, an autobiography, was reduced to a hundred pages. This new format was a success, selling enough copies that a third reprint was available by September. In May 3rd, 1938, Valentino Bompiani decided to publish the complete first part of *Mein Kampf*¹⁸ in Italian, under the title *La mia vita*, *My Life*. The release was accompanied by a big advertisement campaign, including a poster that was released in bookstores in Florence, Milan, and Rome, after receiving the approval of Mussolini and the Minister of Popular Culture.

Valentino Bompiani's business acumen proved to be even better than his former boss'. His

¹⁸ Adolf Hitler, *Mein Kampf*, Max Amann, Munich 1925.

publication "La mia vita" sold even more copies than "La mia battaglia" and was reprinted 15 times until 1943. Bompiani maintained a good relationship with the censorship authorities of the time, as it was crucial for him to avoid problems with his publishing activities¹⁹. At times, he even aligned with the political ideology of the regime, such as creating a register of publishers which would have led to increased political control in the publishing industry. Bompiani believed in Mussolini's view that press censorship was not suppressing freedom of speech but granting freedom within a fascist press. He continued his collaboration with the government until the last months of the regime and was part of Mussolini's E42 project, which aimed to promote the initiative through a bi-monthly magazine. He also showed his support for Italian soldiers on the battlefield, offering 10,000 copies of propaganda volumes to the armed forces.

In 1938, Bompiani was among the passive Italian intellectuals who were unaffected by the Anti-Semitic laws. He even requested a signed picture of Mussolini with a dedication to display in his office, just like Arnaldo Mondadori. It was common among intellectuals to maintain their relationship with Mussolini and proudly show their support during the regime.

Anti-Semitism and censorship during the war period:1939-1943

Book remediation

In the post-war era, the relationship between the publishing industry and the fascist regime was not a primary focus for literary historians. In fact, even in the late 1980s, it was still a somewhat obscure and uncomfortable area of study. One example of this was a conference organized by the Fondazione Mondadori in February 1981, which was dedicated to the publishing industry in Milan during the two wars period. During the conference, after an introduction by Arnaldo Mondadori's daughter, Mimma, several speakers, including Valentino Bompiani, discussed the subject without addressing any negative aspects of the industry's connection to the fascist regime. Instead, they praised the business acumen of the first publisher from Milan, Arnaldo Mondadori.

This was typical of the general attitude towards the matter at the time, and the situation was even worse when it came to more serious issues like the effects and consequences of the anti-Semitic legislation of 1938. The fascist regime implemented measures aimed at suppressing thousands of books written, translated or edited by Jewish people, and distancing personnel of

¹⁹ Irene Piazzoni, *Valentino Bompiani. Un editore italiano tra fascismo e dopoguerra*, LED edizioni universitarie, Milano 2007, pp. 166

Jewish origin from the publishing industry, including both low-level workers and business leaders. The role of Mussolini in this remains a subject of debate among historians. He had previously mentioned the possibility of a racial turn in fascist cultural politics, but it wasn't until the invasion of Ethiopia and the building of the empire that the situation became more pressing. In November 1936, Mussolini stated that the racial problem had to be faced and introduced into fascist doctrine and literature, and he soon ordered the interruption of collaboration with Jewish writers and journalists in "Popolo d'Italia." This increase in anti-Semitic publications shows how focused Mussolini was on manipulating public opinion and gradually shifting the focus to the racial issue.

The publishing industry soon became aware of the situation. In a letter to Arnaldo Mondadori, the president of the Association of Fascist Editors, Franco Ciarlantini, wrote that he had warned the other editors about the situation since the beginning of 1938. Mussolini himself intervened and ordered the seizure of the translation of three books written by the popular Austrian writer Stefan Zweig due to his Jewish heritage. This happened on February 1st, 1938, during Zweig's exile in Great Britain.

The situation escalated even further in May when Mussolini officially had to deal with Nazism. Disappointed with the rise of Nazi Germany, he believed it was necessary to shake up Italy, and he launched new initiatives to forge the soul of the Italian people. Some of these initiatives, the so-called "bonifica linguistica", *linguistic remediation*, like the decision to introduce the use of "Voi", *You*, and the attempt to suppress loan words, had little to no impact.

In the autumn of 1938, guidelines for the publishing industry began to emerge, but the industry was not caught off guard. At first, the focus was on banning books by Jewish authors who had fled Austria and Germany, such as Stefan Zweig. In June 1938, the president of the Fascist Federation of Booksellers suggested that all books written by Jewish authors be removed from store displays. By August, school textbooks written or published by Jewish authors were banned from the market, and in September, a special edition of the bibliographical journal "Il libro Italiano"²⁰, *the Italian book*, was dedicated to the racial issue, in collaboration with the Minister of Popular Culture and National Education.

A commission led by the Minister of Popular Culture was established to oversee the book ban, with representation from the Italian publishing industry. Mussolini, however, seemed to

²⁰ Guido Bonsaver, *Mussolini censore, storie di letteratura, dissenso e ipocrisia*, Editori Laterza, Bari 2013 pp. 129

avoid direct involvement and instead embraced his role as an occasional censor, although there are a few instances where he acted directly. One such instance is the case of the Laterza publisher, which survived fascist censorship thanks to Mussolini's calculated liberality. This showed Mussolini's respect for pre-fascist liberal culture, but it was also a strategy to maintain the illusion of freedom of speech in Fascist Italy.

However, Mussolini's tolerance was limited to a select few cases. The acceleration of book censorship was in response to a similar initiative in Nazi Germany, where in April 1940, the "Totalverbot" banned the publication and distribution of any works written by Jews, with exceptions made for some essential scientific works. In the following months, as the French were occupied by the Nazis, Goebbels' attention shifted to the French publishing industry, and with the forced collaboration of French publishing houses, a list of 1060 unwanted newspapers and books was released in October 1940, known as the "Otto List." *Otto lists*, probably named after the German ambassador in France, Otto Abetz.

In 1942, the list of banned authors in Italy was sent to various organizations and government bodies, including publishing houses, libraries, and prefectures. Five months after the Nazis made their request, the Italian list was shared with the Minister of Foreign Affairs on April 11th, and eventually reached the German Embassy in Rome on July 4th.

Compared to the German list, the Italian list was significantly longer, with a total of 893 names (912 if mistakes and duplicates were included), compared to the German list's 602 names (640 in a later version). The difference was mainly because the Nazi censorship mainly focused on German-speaking authors. The Italian list also included writers, composers, comedy writers, and around 300 foreign writers, whereas the German list only had a few foreign authors.

It's worth noting that the Italian censorship was sometimes stricter than the German one, with names like Sigmund Freud and Hermann Hesse appearing on the Italian list, but not on the German list. The Italian list was clearly influenced by anti-Semitic beliefs, as around 800 of the names on the list were of Jewish origin, with another 100 anti-fascist writers included.

Women out of place

Being a female writer during the era of Italian Fascism was a significant challenge. Despite the fact that Mussolini never considered women to be equal to men, his collaboration with the highly educated woman Margherita Sarfatti was full of contradictions. For instance, the Futurist movement founder Filippo Tommaso Marinetti was openly misogynistic, as was evident in the Futurist Manifesto. Elsa Morante wrote that Bottai's magazine "Primato" excluded women writers, which was confirmed by the magazine's overall index. Similarly, the

editor-in-chief of the regime newspaper "Il Popolo d'Italia", Giorgio Pini, never reviewed a book by Gianna Manzini, even after being requested to do so by the literary critic Giuseppe Villaroel. Given Pini's dependence on Mussolini's direction, it can be assumed that the Duce himself had the final say on the women allowed to be featured in the magazine. There were exceptions, such as the poet Ada Negri, who was also Mussolini's protege, and Gianna Manzini, whose work was later positively reviewed in the newspaper by the Duce's approval. Margherita Sarfatti and Gianna Manzini both faced challenges in their careers due to Mussolini, but for different reasons and in different situations. Margherita Sarfatti collaborated with magazines linked to the Socialist movement. When she met Mussolini, she taught him about the arts, foreign literature, architecture, and how to communicate with people from diverse backgrounds. This was extremely important for Mussolini, who relied on her knowledge and trust when he was expelled from the Socialist Party and founded "Il Popolo d'Italia" in November 1914.

Margherita Sarfatti was a prominent woman writer in Italy during Fascism and made significant contributions to several magazines and newspapers of the time. Her signature appeared in articles related to contemporary art and women's affairs in "Il Popolo d'Italia," a newspaper founded by Benito Mussolini after he was expelled from the Socialist Party. She was also a crucial collaborator in the foundation of magazines such as "Ardita" and "Gerarchia," of which she became the official editor between 1925 and 1934.

One of her most influential contributions was the biography of Benito Mussolini, "The life of Benito Mussolini,"²¹ which was released in its English translation in the autumn of 1925. The book initiated a process of sacralizing the figure of the Duce and was aimed at securing the devotion of all Italians. The Italian edition of the book, titled "Dux," was released in 1926 by Arnoldo Mondadori and became a best-seller, selling over a million copies and having 17 reprints. However, certain stories were cut from the Italian edition, such as the story of the New Year's Eve night in 1922-23 and their night walks in Rome, to avoid the implication of a romantic relationship between the two. Despite the initial physical attraction, their relationship started to change as their focus shifted towards intellectual work. The rise of Fascism and Nazism, and the increasing pressure on the Jewish matter, also put a strain on their relationship. Margherita converted to Catholicism in 1928 in an attempt to prevent this, but it wasn't enough for Mussolini. By that time, he had enough experience and didn't need Margherita's help in matters of culture and propaganda abroad. Additionally, their relationship

²¹ Margherita G. Sarfatti, *The life of Benito Mussolini*, Thornton Butterworth Ltd, London 1925.

had started to fade and Margherita was easily replaced by other women, particularly Claretta Petacci, who started an exclusive relationship with Mussolini. In conclusion, being a woman writer in Italy during Fascism was a challenging endeavor, with women never being on the same level as men according to Mussolini's views. However, Margherita Sarfatti made significant contributions and left a lasting impact on the cultural and political scene of the time, despite the obstacles she faced. Margherita Sarfatti's departure from Italy was a turning point in her life and career. Her association with the fascist regime, along with her Jewish heritage, made her a target of persecution in a country that was rapidly becoming more and more racist. Given her close proximity to the Swiss border and her lack of ties to anything that could implicate her, it was a fairly easy decision for her to leave. Although her works were in line with fascist ideology, and the success of Mussolini's biography meant that her contributions would not be easily forgotten, it was the gossip and rumors surrounding her that ultimately forced her hand. One such incident was the comments made by British journalist Paul Cremona in a July 1938 article for the "Christian Science Monitor." In the article, Cremona mentioned that Mussolini was obliged to be lenient with Jewish individuals like Margherita Sarfatti, who had helped him financially. This information caused Mussolini to become furious, and he ordered Cremona's expulsion from Italy. He even threatened to have Cremona tried in a special court if he hadn't been a British citizen. Another event, on August 10th, 1939, involved a wiretapping conversation between two editors discussing the anti-Semitic measures for the publishing industry. They noted that Margherita Sarfatti's works would likely not be affected. Although Mussolini did not take any direct action against the individuals involved in the conversation, the consequences were felt by Margherita Sarfatti and the government's censorship regime. He first ordered all of her works to be removed and then extended the book remediation that had previously only affected books published after 1918 to include all books published from 1850. This effectively ended Margherita Sarfatti's career as a writer and editor. Despite the challenges she faced, Margherita Sarfatti continued to live a full and meaningful life after leaving Italy. She sought refuge in other countries, where she could continue her work as a writer and an advocate for women's rights and other social causes. In many ways, her experiences served to strengthen her resolve and deepen her commitment to making a difference in the world. In the end, despite the obstacles she faced, Margherita Sarfatti's legacy lives on, and her contributions to the world of contemporary art and politics continue to be recognized and celebrated today.

Alba De Céspedes (1911-1997) was a woman who faced censorship during a challenging time in history. Born in 1911 in Rome to a Cuban diplomat and an Italian, she lived a life marked

by adversity. At the young age of 15, she married and had a son two years later. However, after divorcing in 1931, she sought a new direction in life and started a career in the publishing industry.

In 1938, her first novel "Nessuno torna indietro"²², *No one comes back*, was published by Mondadori and received significant marketing support. The book was about university students in a boarding school and was a commercial success, with 12 reprints in its first year. Despite the popularity of her first novel, her second volume, a collection of short stories called "Fuga" (Escape), drew the attention of censorship.

De Céspedes made the unfortunate decision of sending a copy of her new work to Mussolini, who reportedly labeled it as immoral. This move led to accusations of trying to use her political connections to get closer to Mussolini, despite her arrest during the Ethiopian war and the controversial subject matter of her work. The situation only escalated when, in 1941, two anonymous letters accused her of hosting anti-fascist meetings at her home and listening to the "Radio Londra" program on the BBC. Despite the lack of evidence, the accusations were taken seriously, and in June of that year, Mondadori himself suggested that there may have been a smear campaign against her.

In August, the Minister of Popular Culture imposed an indirect censorship, banning the marketing of any of De Céspedes' works. This was a harsh blow to her career, and despite the suggestion of a smear campaign, the accusations against her were never fully cleared. The lack of recognition for her work, despite its popularity, is a testament to the challenges faced by women during that time.

In conclusion, Alba De Céspedes' case of censorship was a specific and challenging one that highlights the difficulties faced by women and the literary community during a time of political turmoil. Despite her bravery in pursuing her passion and her talent as a writer, she faced unjust accusations and was ultimately silenced. Her story serves as a reminder of the importance of free speech and the ongoing struggle for creative freedom.

Alba De Céspedes' journey with censorship was far from over. In September of the same year, she requested a meeting with Mussolini but was rejected. Meanwhile, Mussolini requested a report on her activity, which he received on October 13th in the form of a record from the Political Police, outlining her misadventures with the authorities. However, Alba refused to give up and reached out to the head of the Minister of Popular Culture. She revealed that she had received an advance payment of 60,000 lire for the film rights to her novel and now the

²² Alba De Céspedes, *Nessuno torna indietro*, Mondadori, Milano 1938.

directors were demanding their money back. She begged for the ban on her novel to be lifted and for permission to produce the film. Alba even offered to edit out any controversial elements from the script. On November 20th, 1941, her request was granted and the screenplay was edited further before the movie was finally released in 1943. Unfortunately, the authorization for the movie did not mean a return to her publishing career, as the ban on her novel was still in place, along with other restrictions. In November 1942, Alba requested a renewal of her passport so she could move to Germany and France, where she intended to write articles for a Mondadori newspaper, likely the prestigious "Tempo". This request sparked a letter exchange between the Minister of the Intern, who was effectively Mussolini, and the head of the Minister of Popular Culture. On November 26th, 1942, Alba's visa request was officially denied.

Last evidence of censorship

During a global conflict, the entire nation and those responsible for propaganda and censorship must be mobilized. As a result, the Duce changed the leadership of the Minister of Popular Culture to someone who was militarily experienced and culturally advanced. At 36 years old, Alessandro Pavolini became the Minister, despite his youth, his background showcased his hierarchical experience.

As the son of a university professor, Pavolini was involved in the March on Rome and became a federal deputy of Florentine fascism at only 23 years old. He quickly rose through the ranks, becoming an official federal a few years later. Despite his tough measures against publisher Laterza during the book remediation process, Pavolini was vetoed by Mussolini in the first few months of his appointment. After a long discussion, the commission accepted Pavolini's firm decision against Jewish authors, following a defense of the publishing industry by Arnaldo Mondadori.

Pavolini's energy and determination was restored following the fall of fascism in September 1943, and he became the Duce's most determined lieutenant. He founded the Black Brigades, watched the trial and death sentence of his former friend and protector Galeazzo Ciano, and acted as party secretary. Mussolini's role as "censore maximo" became rarer during the war years.

Despite censorship, the North American wave of book sales continued to thrive in Italy, helping to balance the publishing industry. Publishers such as Arnaldo Mondadori were caught between maintaining a good relationship with Mussolini and protecting their business. During the war, popular novels such as *Gone with the Wind* by Margaret Mitchell, *The Rain Came* by Louis Bromfield, and *Northwest Passage* by Kenneth Roberts, sold over 50,000

copies, with *Gone with the Wind* selling over 1,000 copies in 1942. These numbers are significant, as the first runs of Italian novels by major publishers usually sold no more than 5,000 copies.

During the time of Mussolini's reign, publishers like Arnoldo Mondadori tried to take advantage of their relationship with him to further their interests. However, as authorizations to translate books from English became more scarce, Mondadori had to find alternative ways to get his works published. This led to the release of the popular Hungarian novel *Abel Alone* by Áron Tamási, which was authorized with the premise of cutting the erotic content from the translation. Despite initially appearing to have given in, in 1941 Mondadori released the complete text, much to the surprise of the Ministerial Officials.

Mondadori was lucky enough to avoid any repercussions for this bold move, but later on when he requested a meeting with Mussolini, he was rejected due to the disappointment with his choice to publish the complete text of the Tamasi novel. In an attempt to prove that the publication was not his intention, Mondadori tried to convince Mussolini that it was due to the curators' distraction. However, Mussolini was not swayed by this argument, having prior experience with Mondadori's methods.

In addition to his relationship with Mussolini, Mondadori's publishing house was also in danger due to the actions of its co-director, Luigi Rusca. Rusca was openly hostile towards Fascism, and was often charged by the Political Police for expressing his irony and sarcasm towards the regime. Despite being monitored by the police, Rusca was never proven to be involved in any anti-Fascist organizations. However, Mussolini still saw fit to punish Rusca, leading to his arrest. In order to avoid further problems for his publishing house, Mondadori avoided taking Rusca's side. Fortunately, the Political Police was unable to gather enough evidence of anti-Fascist activity regarding the publishing house. The reason for Rusca's condemnation now seems absurd, as he was accused of being an "Antifascist mormoratore", or someone who subtly says anti-Fascist things.

Another publisher, Valentino Bompiani, also became concerned that his collaborations with the regime would reach its limit of toleration. Bompiani's catalogue placed a great emphasis on foreign literature, which often put him in conflict with the regime's directives. In January 1942, Pavolini introduced a new law which required every publishing house to release one foreign book for every four Italian ones. This regulation gave the Minister the convenient excuse to justify his actions.

One of the most striking examples of censorship by Mussolini was the book "Parlo con Bruno," or "Talk to Bruno." This was a volume of memories dedicated to Mussolini's son,

who died in a plane crash in August 7th, 1941. Despite the book being filled with real emotions that a father would have for his son, and despite describing him as the perfect Fascist and Italian, Mussolini asked that the press not give him attention and the editor Hoepli not run any marketing campaigns for the book's release. He did not want people to flatter him solely because of the book.

Mussolini's focus on himself and the Minister of Foreign Affairs, as well as his involvement in fields outside of his expertise, such as censorship and the publishing industry, was a paradoxical example of his lack of knowledge in these areas. One such example was when Bottai, the Minister of Italian Africa, asked Mussolini if an essay he was about to publish would be better suited for the series of the Minister of Italian Africa or Pnf. Despite approving the essay for release on Italian Africa, two months later the last Italian soldier in Africa surrendered.

At this point in time, the collapse of the fascist regime led by Benito Mussolini was only a matter of time. During the night of July 24th and 25th 1943, members of the Gran Consiglio had a pivotal meeting. Two out of four members of the council conspired against Mussolini, and as a result, the two decades that saw him in control of Italy's publishing industry came to an end. He would soon become a shadow of his former self, far removed from what remained of fascist Italy. Behind the scenes, Mussolini returned to his journalist roots and wrote over 90 articles under a pseudonym for the new press agency "Corrispondenza Repubblicana" or Republican Correspondence. Despite the funds provided to his inner circle of intellectuals, the two decades of totalitarian rule failed to change Italians, and his circle of intellectuals was not a loyal army of supporters. Thus, it was not surprising that the Italian people turned against Mussolini as well. On July 25th 1943, when news of Mussolini's arrest was made public, Arnoldo Mondadori, according to his daughter Mimma, broke the frame containing the picture of the Duce and stepped on it, expressing his pent-up rage and frustration. Mondadori, meanwhile, fled to Switzerland with his two sons, Alberto and Bruno, and the publishing house was left in the control of the new regime until the end of the war. As we know now, Mussolini tried in vain to reach the Swiss border in April 1945. Among the papers in the luggage that Mussolini tried to bring with him was a telegram from Arnoldo Mondadori. The fact that Mussolini decided to bring this document with him might suggest that until the end, he wanted to share something with someone who was a true authority in the world of publishing and writing books. However, an encounter between Mussolini and Mondadori in Switzerland was impossible.

Chapter 4

A publishing industry analysis through data

In the next chapter, I delve into a comprehensive comparison of data regarding the sales, readership, distribution channels, and market shares of the publishing industry in Italy, primarily over the past two decades from 2000 to 2022. The aim of this analysis is to discern the changes and evolution that have taken place in the publishing market over the years and examine how the industry has adapted to new trends and the evolving needs of its readers. The chapter is divided into two parts. The first part focuses on the decade from 2000 to 2012, a period when e-books started gaining popularity in Italy. Despite being introduced much earlier in the global market, this was the time when the medium was starting to make its presence felt in Italy as well. In the second part, I focus on the years from 2013 to 2022, a period that saw the digital book market grow even further, largely due to the impact of the COVID-19 pandemic. This decade saw a significant increase in digital book sales and their relevance in the market.

By analyzing the data, I hope to provide a comprehensive view of the changes that have taken place in the Italian publishing industry over the years, and how the market has responded to new trends and reader demands. The ultimate goal of this analysis is to shed light on the evolution of the publishing industry in Italy, and to understand its strengths and weaknesses as it has adapted and grown.

2003 - 2013 The publishing industry of the new millennium

The 2006 Italian Publishers Association (AIE) report on the state of publishing in Italy aimed to inform those in the publishing chain, as well as those in cultural policies, about the changes in the industry. The report noted that there was a hard core of strong readers in Italy, but also a significant portion of the population (57.7%) who did not read any books. The report showed an increase in published titles, but a growing divide between regions and between readers and non-readers. Italy's weight in the European publishing industry had declined, and it remained heavily dependent on acquiring publishing rights from abroad, primarily from English works. The digital content market was expanding, but e-books had limited demand confined to the academic market. The report emphasized the need for a deep understanding of the publishing industry to adapt to the digital era.

A 2013 survey by Bookcity - Indagine Ipsos showed that the majority of Italians read less

compared to other European countries, averaging 7 books per year. The majority of participants were occasional readers, with a smaller portion being strong or the strongest readers who are big consumers. There were more readers in the northern part of Italy, and women read more in the region. Younger people up to 34 years old were considered moderate readers. The survey revealed that e-books were known by almost all participants, but only 36% used them, with 64% preferring traditional physical copies. The stronger the reader, the more likely they were to also be an e-book reader.

Valori%

	Superlight (1-2 libri)	Light (3-5 libri)	Medium (4-10 libri)	Strong (11-20 libri)	Book Addicted (>20 libri)
si ma mai usato	80	61	48	49	30
si e ho usato	17	36	51	50	70
non conosce	3	3	1	1	

Ipsos Public Affairs November 2013²³

Data suggests that regular e-book readers value the practical aspect of e-books, while those who prefer physical books view the reading experience as more emotional and connect with the tactile elements, such as the feel and smell of paper, as well as the ownership of a physical copy.

2014 - 2022 From the rise of e-books to our days

This information suggests that the Italian publishing market has been impacted by the Covid-19 pandemic and the resulting closures of bookstores. However, the market is slowly recovering, with a reduced loss of revenue from April to July of the same year. Bookstores and large retailers have seen a partial recovery in market share compared to online stores, and the book market is seen as a way to restart the Italian economy. Online channels, such as the Arianna circuit, have continued to grow in recent years, and the closure months may have accelerated this trend. The way people choose and buy books is also changing, with an increasing shift towards online channels and the use of search engines to find books to read and buy. This highlights the importance for publishers to think about their presence in different commercial channels and to improve their management and quality of metadata.

²³ Book city, Ipsos Public Affairs November 2013, p. 10

Information and Purchase: From book selection to the choice of sales channel

The way readers choose and buy books is evolving. In 2018, online stores accounted for 24% of the total sales of books (excluding education and digital products like e-books and audiobooks). Physical bookstores remain the primary channel for book purchases, as they offer an immersive and exploratory shopping experience. 34% of readers cited the atmosphere of the bookstore as a factor in making a purchase, while only 19% cited the depth and variety of the book selection. On the other hand, 33% of readers choose online stores because they can find books that are not readily available in physical stores. The rise of e-commerce has increased the number of commercially available titles, making it more important for publishers to have a presence in multiple sales channels.

The ways in which people find information about books is also changing. 26% of book recommendations come from digital sources, such as websites and social media, as opposed to traditional sources like newspapers and television. These digital sources generate different recommendations for different readers and genres, making it challenging for publishers to manage their marketing efforts effectively. Additionally, the benefits that readers seek from different sales channels are changing. For example, some readers might buy books from a physical bookstore and an online store, or at a book fair, while others might buy books from a grocery store. The growing trend towards multi-channel purchasing means that publishers need to think carefully about how to reach their target audience through multiple channels. Finally, the increasing number of available channels is enabling stronger readers to make the most of the opportunities to find books they want to read, with 38% of readers reporting that they use search engines to find books they want to purchase.

Where readers buy books

Bookstores in various forms continue to be the most popular place where readers get their books. 81% of those surveyed prefer bookstores, including chain stores (59%), shopping center locations (30%), independent bookstores (12%), and small bookstores and stationery stores (11%). 18% of readers prefer newsstands for obtaining books to read.

Online stores are the second choice for readers, with 31% of the indications, followed closely by "other bookstores" which includes used bookstores and stationery stores. The GDO book stand is less popular, indicated by only 9% of readers. Book fairs, salons and literary festivals are also not very popular, only 4% of the respondents answered that they purchase books from them. The library is not a popular option for obtaining books, indicated by only 11% of respondents. 26% of those who received a book as a gift is distributed mainly among

bookstores and online stores. These numbers indicate that bookstores and online stores are likely to see an increase in their share.

The Multi-Channelity of Purchase

A multi-channel reader is emerging, with 43% choosing their purchase channel based on their needs and circumstances. However, 49% of readers still primarily buy from one channel, with 80% of these choosing retail formats such as bookstores, independent or chain. Only 10% of single-channel buyers purchase solely through e-commerce.

31% of readers who buy from online stores are more likely to purchase from other channels as well, while only 58% of those who buy from chains and shopping centers are inclined towards multi-channelity. This means that publishers need to be physically present at the store or have their books listed in the bibliographic database with necessary metadata. This propensity for multi-channelity is correlated with the number of books read, with 67% of strong readers falling into this category compared to 25% of weak readers.

The choice of which channel to buy from is increasingly influencing the choice of which book to read. For example, 39% of respondents choose the grocery store as their purchasing channel because it is the easiest place to reach, and this value increases to 43% in smaller municipalities and decreases to 37% in larger municipalities, likely due to the presence of bookstores. A similar relationship is seen with online stores, with 11% choosing them because they don't have a library or bookseller nearby, and this value increases to 14% in smaller municipalities and decreases to 9% in larger ones.

The top drivers of choice for purchasing channels are "Atmosphere" (34%) and "Exploration" (45%) for bookstores, "Promotions" (44%), "Convenience" (36%), and delivery speed and availability (33%) for online stores, and "Atmosphere" (45%), "Exploration + participation" (43%), and "Exhibition" (40%) for fairs. The drivers for grocery stores have remained the same, indicating a lack of transformation in public perception and a stable offering.

Why abandon the bookshop?

66% of readers (aged 15-75) who purchased books from chain and independent bookstores, including newsstands, reported buying the same amount of books in 2018 as they did the previous year. 7% of these readers said they bought more books, while the remaining 27% reported buying fewer. The decrease in book purchases was more prominent among the central section of the population (25-44 years old), while the decrease was less prominent among the extreme age groups and weaker readers (33%) and non-readers (35%).

The decrease in book purchases was centered around three main factors: the lack of interesting book offerings (22% of responses), the closure of nearby bookstores (15% of responses), and lengthy delivery times and difficulty in determining availability (13% of responses). These variables are also correlated with the size of urban areas, with a higher increase in the decrease of book purchases in smaller urban areas and larger urban areas.

Reader behaviour towards used books

The growth in the purchase of used books by readers is a notable trend. 27% of people aged 15-75 claim to have bought a used book from a variety of sources such as bookstores, fairs, stalls, and online stores. This percentage is closely linked to the reading index, with 28% of weak readers (those who read 1-3 books) and 53% of strong readers buying used books. 9% of buyers who purchase used books are non-readers and are likely making these purchases as gifts.

The audience for used books is young, with 50% of buyers being under 25 years old and younger than the average age of book buyers. This group has its own multi-channel purchasing behavior, with 67% of those who bought used "various" books also buying new books in chain bookstores, 51% in family-run bookstores, 25% in newsstands and GDO, and 39% in online stores. This helps to explain the changes in the offerings of many physical and e-commerce stores currently underway.

Reasons for reading a book, an e-book, or an audiobook

The primary reasons for choosing a book, e-book, or audiobook to read and buy are "interest in the topic" (63%) and "interest in the author" (37%) with an additional 7% indicating "depth on current topics." These reasons can be attributed to the publisher's ability to stay on top of popular topics and to publishing houses' focus on authors. Recommendations from friends and family (28%) and bookstore exposure (20%) also play a role in the decision-making process, with discounts only being a factor for 18% of readers. The methods of communication that influence reading and purchasing decisions have changed from 2017 to 2019, with traditional forms of communication like newspapers and magazines declining in influence (13% to 9%) and social communication forms and book influencers becoming more important (14% to 16%). Bookstore exposure and the advice of librarians have also increased (13% to 20% and 6% to 10%, respectively).

Influence of social media on book purchases

The behavior of buyers when it comes to social media and book purchases has been analyzed, and it has been found that this behavior is prevalent among the young population and strong to medium-strong readers. Around 59% of those who responded positively to buying a book inspired by reading blogs and social media are under 44 years old, with even higher percentages among strong and medium-strong readers.

Publishers are presented with new and diverse consumer profiles due to these changing behaviors, which involve a mix of in-person book browsing and social media usage, a preference for book influencers over traditional reviewers, and an emphasis on "face-to-face" word of mouth. These behaviors are particularly relevant for younger age groups, and publishers will need to take them into consideration for future prospects.

In terms of market concentration, 13.6% of readers (15.2% of buyers) generate 40% of the market in terms of copies purchased. On the other hand, weak readers (1-3 books per year), who make up 46.8% of readers (and 38.9% of buyers), generate only 18.8% of copies sold. This has been a structural characteristic of the market, as indicated by a Nielsen survey conducted in 2012. A decrease in strong readers or in the average number of books purchased can have a significant impact on the market, as indicated by a 0.5% decrease in strong readers resulting in a 0.7% decrease in copies sold or a decrease in average volumes purchased resulting in a 13.9% decrease in copies sold.

The market: A Positive 2018

The publishing industry in Italy showed a slight positive growth in 2018, with a 0.7% increase compared to the previous year. This marked the fourth consecutive year of positive growth for the industry. Despite this positive trend, the industry has not yet reached the values seen in 2011.

The trade channels for adult and children's books showed a slowdown in growth compared to the 2017 figure of 4.7%, due to a combination of factors. Structural issues, such as the ongoing crisis in large-scale retail trade and the closure of a major distributor, contributed to a decline in the sector. Additionally, temporary difficulties in logistics services, the absence of major bestsellers, and financial difficulties faced by family-run bookstores also impacted the sector. This led to a reduction in the breadth and depth of their offerings and an increase in multi-channel and customer migration, resulting in a loss of occasional customers.

Despite these challenges, the publishing sector remains the leading cultural industry in the country, excluding advertising, hardware, and public contributions. School publishing showed

growth with a 3.5% increase, and the educational publishing industry as a whole exceeded one billion euros.

For the first time in 2018, the children's and young people's sector saw a negative growth with a 0.9% decrease in value and a 2.9% decrease in copies sold. The e-book market showed a 4.7% increase, but this growth was lower than expected. This was partly due to the high rate of piracy in the sector, with 31% of e-book readers reporting that they obtained the books for free.

A market for audiobooks is being established, but the limited size of the catalog of Italian titles is currently the main challenge. Podcasts and audiobooks are seen as new ways of reading and thinking about new editorial products for the network, but the market is difficult to quantify economically. The sale of rights abroad showed a 9.0% increase, slower than the 10.1% increase seen in 2017. Growth was driven not only by children's books, which made up 39.0% of sales, but also by Italian narrative authors, which accounted for another 25.4% of sales. In 2001, only 3.7% of published titles found interest from foreign publishers, but this figure rose to 10.6% in 2018. Despite this growth, it is estimated that the overall value of exports is still no more than 5%.

The publishing industry in Italy has become more international, but a small portion of the turnover of companies and the supply chain still comes from the international market.

Stagnant growth but (in the end) positive

The market for various products including education, online sales, B2B, etc. showed a slowdown in 2018, contrary to expectations of continued growth. The market value in 2018 was 2.793 billion euros excluding Amazon and had a growth of +0.7%. However, the actual market size is believed to be wider and could reach around 3.170 billion euros if the value of other areas such as after-school activities and other educational products are included.

In 2018, the adult and young adult fiction market saw a decline of -0.6%. This was due to a -0.8% decrease in physical product channels, offset by a +4.7% increase in the e-book market. On the other hand, the school adoptable market showed a positive trend with a growth of +3.5%. As a result, the total value of this group of channels, which mostly deals with both product categories, was +0.8%.

The educational sector has now exceeded the value of 1 billion euros and is worth several tens

of millions more compared to the 1.3 billion euros of the adult and young adult fiction market.

Rapporto sullo stato dell'editoria in Italia 2019, Ufficio studi AIE²⁴

**70. ANDAMENTO DEL MERCATO DEL LIBRO NUOVO, E-BOOK E SERVIZI EDITORIALI VIA WEB:
2016-2018***
(Valori in .000 di euro e in %)

	2016 (.000)	2017 (.000)	2018 (.000)	Δ % 2018/17
Librerie (indipendenti e catena)	818.000	841.000	827.000	-1,6%
Cartolibrerie, pv minori	44.000	44.000	43.000	-2,3%
Gdo	131.000	109.000	90.500	-17,0%
Vendite online	199.000	257.000	277.500	+11,4%
Edicola ¹	11.500	11.000	9.000	-18,0%
Bookshop, musei e mostre	22.600	23.400	26.000	+11,0%
Saloni, festival, ecc. e altro	22.600	23.400	24.000	+2,6%
e-book	62.000	64.000	67.000	+4,7%
[a] Totale	1.310.700	1.372.800	1.364.000	-0,6%
[b] Libri scolastici di adozione (libreria, e-commerce, Gdo) ²	700.900	722.100	747.700	+3,5%
[a+b] Totale	2.011.600	2.094.900	2.111.700	+0,8%
Rateale per le famiglie, Vpc, collezionabili (fascicoli in edicola), rateale professionale ³	306.600	275.000	257.100	-5,5%
Banche dati e servizi Internet	260.000	279.500	293.500	+5,0%
Vendite a biblioteche (b2b)	43.500	44.700	46.000	+2,9%
Ricavi e vendite (b2b)	34.800	35.000	38.000	+8,6%
Export di libri italiani all'estero	41.500	44.000	47.700	+6,8%
[c] Totale	686.400	678.200	681.600	+0,5%
[a+b+c] TOTALE MERCATO	2.698.000	2.773.100	2.793.300	+0,7%
Collaterali venduti in edicola	80.200	74.100	74.300	+0,3%
Libri allegati a quotidiani	42.000	44.000	50.000	+13,6%
Altri collaterali	38.200	30.100	24.300	-19,2%

* Escluso Amazon

¹ Esclusi collaterali (carta o e-book) venduti con quotidiani e periodici

² Esclusa la parascolastica (dizionari, eserciziari, libri integrativi, narrativa per la scuola e la manualistica per la didattica universitaria)

³ Il valore del rateale professionale - che comprende una stima di vendite anche nei canali fisici e di e-commerce - considera assieme prodotti digitali esclusivamente offline, e prodotti cartacei che hanno integrazioni o estensioni digitali (offline e online).

Fonte: Ufficio studi AIE su dati di fonte diversa

Books read, books purchased

In 2018, the number of books, e-books, and audiobooks read remained around 7.5 to 7.6 per person per year, but the percentage of those who claimed to be readers but did not purchase any of these materials increased, ranging from 9 to 11%. The average number of books purchased directly was between 5.2 and 5.4, driven by a concentration of purchases of new titles (14% of readers accounting for 40% of copies sold) in the context of the country's economic, social, and political challenges. Despite the peculiarities of cultural markets, especially in Italy, with low reading and habitual reading rates, the decline in household spending on book purchases may be explained by these factors.

More E-commerce and chains

E-commerce and chain stores are becoming more popular in the book market, with physical adult and youth general book e-commerce reaching 24% (excluding educational books). While bookstores remain the primary source of new books, they have lost ten percentage points in market share over the last decade, falling from nearly 18% to just under 7%. This change is due to the shift in consumer behavior, the convenience of purchases made on the move, and the shortage of sales points. The shift from family-run bookstores to chain stores or franchises has also occurred, with chain stores increasing from 36.5% to 45.0% and family-run bookstores decreasing from 42.5% to 24.0%. However, defining the boundaries between bookstores, stationery stores, and other retail outlets with small book collections is becoming increasingly difficult. Bookstores are increasingly incorporating dining and events, making the mix between books, food, and events complex, with new and used books, and non-books merging together.

Overall market trend

The publishing industry is a major player in the cultural industries, with a value of 3,170 billion euros in 2018. This value does not include advertising revenues, spending on hardware or devices to access content, or public contributions. The book market is not fully represented by the 2,793 billion at cover price, as it also includes the used market, which is increasingly integrated with the new market, and the sale of books on Amazon, which is estimated to have sold various new books for over 200 million euros in 2018. The sum of these other items, along with the 50 million from the sale of collateral at newsstands and the 23 million euros spent in 2018 for the purchase of e-readers, brings the value of the book market to a larger, estimated 3,170 billion euros.

Cultural Industries Compared

In recent years, Italians have spent 802 million euros on the purchase of e-readers, which should be considered expenses for "reading." Although the market for physical books is declining, the industry remains strong, with the 3,170 billion euros in 2018 representing the largest value among the main cultural industries. The definition of the market and the way it is viewed is also changing, as new channels and products emerge that respond to the changing needs of the public.

Decline in physical copies in trade channels

The trend in the market for new adult and young adult books is characterized by a constant decline in physical copies sold, with a decrease from 109 million copies handled in 2011 to 82 million in 2018. This decline can be attributed to the growth of e-book downloads, which are estimated to be at least 10-12 million in 2018, and the growing illegal market, with 31% of readers who declare to have read an e-book or listened to an audiobook claiming to have done so by acquiring it "free of charge". Additionally, a portion of the disappeared spending has shifted towards other purchases, new products, and new channels that better respond to the needs of the public, but are more difficult to monitor.

European Framework

The European book market is fragmented with each country compiling its statistics differently, making it challenging to gather and systematize data from all 28 countries. However, the European Publishers Federation (FEP) has attempted to collect information on various aspects of the book industry, including market value, e-books, titles, and more. The data for the main European countries is provided in a table and updated to 2018.²⁵ Despite the varying market revenue trends in different countries, there are some common elements observed across all of them: the limited impact of e-books on physical book sales, strong growth in the audiobook market, and the overall decline in print runs. Additional information on other European and non-European markets can be found in the Figures and Numbers section of this volume and on the website www.giornaledellalibreria.it.

²⁵ Antonio Lolli, *Rapporto sullo stato dell'editoria in Italia 2019*, Ufficio studi AIE, Milano

Andamento dei principali mercati

+0,7%	-4,4%	+0,0%	+1,9%	-2,7%
Italia	Francia	Germania	Spagna	Uk

88. I PRINCIPALI MERCATI DEL LIBRO EUROPEI

Valori in euro e in %

	Totale mercato (euro)		Mercato libro digitale (% sui canali trade)		Titoli (novità e nuove edizioni)		Tiratura media	
	Md 2018	Δ% 2017-18	Ml 2018	% 2018	Nr 2018	Δ% 2017-18	Nr 2018	Δ% 2017-18
Italia	2,793	+0,7%	67,0 ¹	4,9%	78.875	+9,4%	2.112	-
Francia	2,670	-4,4%	212,6 ²	8,4% ²	106.799	+2,0%	4.732	-5,3%
Germania	9,134	+0,0%	456,7 ³	5,0%	71.548 ⁴	-1,3%	-	-
Spagna	2,364	+1,9 %	119,0	5,0%	76.202	-12,7%	3.762	-5,8%
UK	3,993 ⁵	-2,7%	724,3 ⁶	18,0%	-	-	-	-

¹ Solo e-book di varia

² Valore relativo alle «ventes numériques» di varia, educativo, universitario e professionale

³ Valore stimato

Fonte: Elaborazione Ufficio studi AIE su dati delle rispettive associazioni.

⁴ Solo novità

⁵ Pari a 3,6 miliardi di sterline

⁶ Pari a 653 milioni di sterline

Rapporto sullo stato dell'editoria in Italia 2019, Ufficio studi AIE²⁶

Major publishing groups

The 2018 edition of the ranking of the world's largest publishing groups, which is promoted for the twelfth year by Livres Hebdo and Publishers Weekly, has revealed few new developments and continues to be dominated by some of the biggest names in the industry. Despite experiencing a decline in turnover for several years, Pearson remains in first place with 5.077 billion euros in revenue in 2017, compared to 5.312 billion in 2016 and 6.072 billion in 2015.

The top positions in the ranking, which includes 53 publishing companies with annual revenues of over 150 million euros, remain largely unchanged, with the RELX Group (Reed Elsevier) in second place, followed by Thomson Reuters, Bertelsmann, Wolters Kluwer, Hachette Livre, and Grupo Planeta.

In terms of geographic distribution, the ranking shows that over 60% (61.73%) of the total turnover is related to publishing companies with headquarters in Europe, compared to 59.80% in 2016 and 51.40% in 2015. This share is comprised of 28.7% from companies based in the

²⁶ Rapporto sullo stato dell'editoria in Italia 2019, Ufficio studi AIE, p. 67

United Kingdom and 25.4% from the eight publishing companies in the ranking with headquarters in Germany. Meanwhile, the share generated by publishing companies based in North America is slightly declining (28.41%, compared to 31.12% in 2016 and 26.41% in 2015).

It is worth noting that it is not possible to compare the general trend of Asian publishing companies, due to the exclusion of Chinese publishing groups from the ranking. In 2016, the Chinese government changed the selection criteria for the ranking of the country's main cultural companies, which also includes publishing companies, to be based not only on economic values but also linked to the social impact of the activity. This made it impossible to include Chinese companies in the ranking (last year there were five Chinese publishers, two of which were in the top ten positions). Nevertheless, there is still substantial stability in the number and revenue of Japanese and Korean publishing companies.

It is also interesting to note the confirmation of the return of Brazilian publishing companies to the ranking after their absence in 2015, which was largely due to the severe economic crisis that hit the country. There are now two companies present: Somos Educação and Editora FTD. Brazil is the only South American country that has managed to position one of its own companies in the world ranking of publishing groups. When considering the countries where the parent company of the different publishing groups is based, it becomes evident that the revenue of the publishing sector is still concentrated in realities that have their parent company in Europe. In other words, it is still "old Europe" that is attributed with over half of the world's literary copyright.

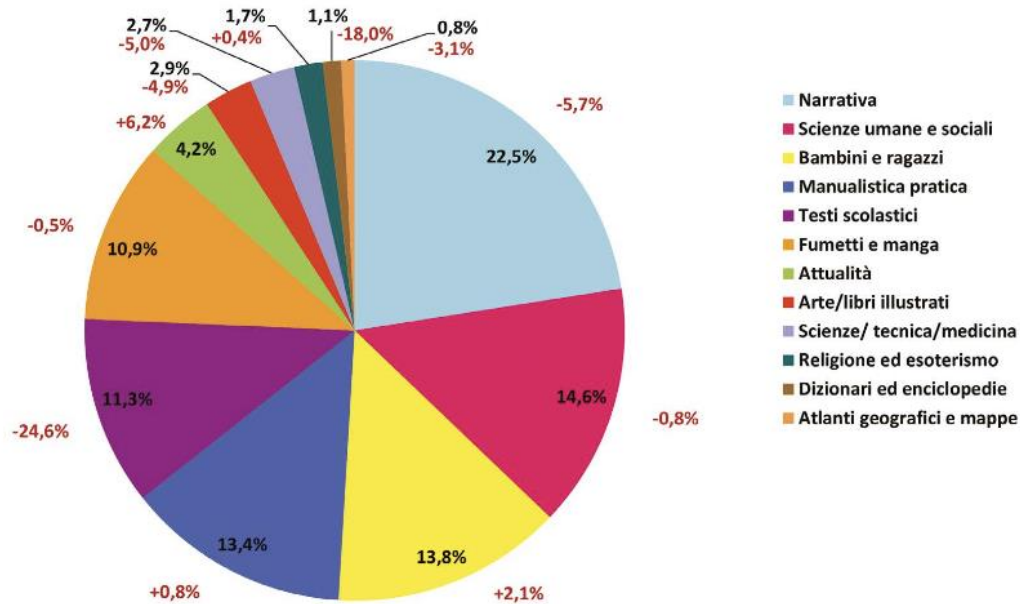
In conclusion, while there are few new developments in the 2018 edition of the world's largest publishing groups ranking, it remains dominated by some of the biggest names in the industry, with the majority of revenue coming from European-based companies.

France

The data from the Syndicat national de l'édition shows a continued downward trend in the net turnover of publishers, with a total of -4.4% compared to 2017, reaching 2.67 billion euros. This includes 2.52 billion euros from the sale of books (in both print and digital form) and 145.4 million euros from the sale of publishing rights. Excluding school textbooks, the turnover was 2.2 billion euros, down 1.6% from the previous year. The reasons for this decline can be attributed to a number of factors, including a lack of real bestsellers, a lack of reform of school textbooks leading to a decrease in the educational sector, changes in people's lifestyles, and the yellow vest demonstrations, which caused many stores to close out of fear

of damage, particularly in Paris during key economic periods for the sector. On the two Saturdays in December when the clashes became more intense, double-digit sales decreases were recorded: -13.9% for Saturday, December 8, and -16.8% for Saturday, December 15 (source: Syndicat de la librairie française).

**90. FRANCIA: VENDITE PER GENERE NEL 2018
(Valori % e Δ rispetto al 2017)**



Fonte: Syndicat national de l'édition

Rapporto sullo stato dell'editoria in Italia 2019, Ufficio studi AIE²⁷

The Sne survey also highlights some trends already detected in 2017, such as a decrease in the number of copies sold (-2.5%), which was 419 million units, compared to 430 million in 2017, a decrease in average circulation (-5.3%), and an increase in the number of titles published (+2.0%). There was a slight decrease in pocket book sales (-0.63%), which represented a slightly higher value share (15.0% of total turnover in 2018, compared to 14.0% in the previous year) and the same volume share (27.0%).

Sales Channels

Regarding sales channels, first-level bookstores - which are considered strategic in terms of turnover and book dissemination - continued to face competition from online bookstores, although to a lesser extent than in previous years. In 2018, 24.5% of sales were made in these

²⁷ Rapporto sullo stato dell'editoria in Italia 2019, Ufficio studi AIE p. 69

bookstores (-2.0% compared to 2017, after -5.1% in the previous year), while 30.4% were made in second-level bookstores (which also include online stores) and marked +1.8% after +2.0% in 2017; 29.7% of sales were made in GSS businesses in France, i.e. large specialized surfaces; and finally, 15.5% of turnover was in the GDO, down from 16.2% in 2017.

Market quotes for genres

In 2018, the children's and youth sector represented 13.8% in value of the total (with a turnover of 347.6 million euros, up 2.2% from 2017), while narrative, with its 567.9 million euros in sales (a sharp decline from the 602 million euros from the previous year), constituted 22.5% of the total.

Rights and co-editions

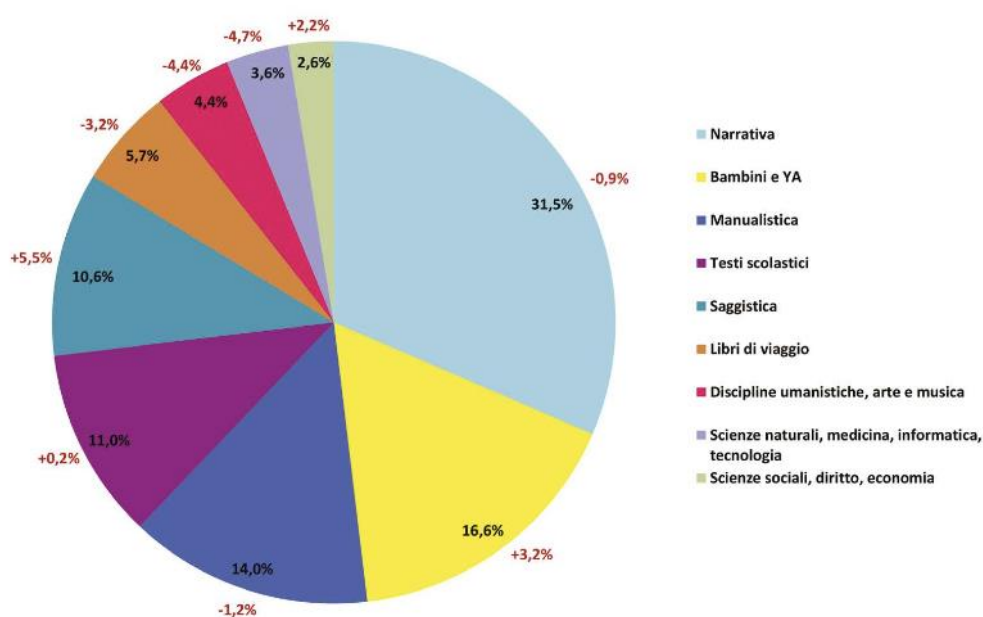
The French publishing industry showed great international growth in 2018, with an increase of 1.6% in the number of French titles sold abroad, following the 8.3% growth from the previous year. This increase in French book sales was also reflected in the number of co-editions, which grew by 4.5%. Italy remained a key market for the French publishing industry, with 1,204 edition rights of French titles sold to Italian publishers. China was the largest market, purchasing 2,285 titles. Italy also led in the number of co-editions, with 438 titles, compared to 333 titles in the previous year, followed by Spanish-speaking countries with 359 titles. When it comes to translations, Italian was the fourth most translated language into French, accounting for 4% of all translations, preceded by English (64%), Japanese (12%), and German (6%).

The digital market saw continued growth in 2018, though at a lower rate than in the previous two years. The sector's turnover was 212.6 million euros, with a 5.4% increase from the previous year. The majority of this growth was driven by sales in the university and professional sector, which accounted for 74% of the total value. In 2017, the increase was 9.8%. However, the overall publisher revenue showed a decrease of 4.4%.

Germany

Germany's book market saw a substantial stability in 2018, with a total revenue from book sales almost constant compared to 2017, estimated at around 9.13 billion euros. This result is similar to the one recorded fifteen years prior, in 2003, when the total revenue was 9.07 billion euros. While the number of new publications decreased last year, with 71,548 in 2018 compared to 72,499 in 2017 (-1.3%), the picture taken by Börsenverein des Deutschen Buchhandels shows a stable market.

91. GERMANIA: VENDITE PER GENERE NEL 2018
(Valori % e Δ rispetto al 2017)



Fonte: Börsenverein des Deutschen Buchhandels

Rapporto sullo stato dell'editoria in Italia 2019, Ufficio studi AIE²⁸

Increase in number of book buyers

The first five months of 2019 showed a positive trend, with a 4.1% increase in value and a 1.7% increase in the number of copies sold compared to the same period in 2018. The real novelty of 2018 is the increase in the number of book buyers in Germany, after five years of repeated negative signs. According to a survey carried out by Gfk on a representative sample of people aged 10 and over, 29.9 million Germans purchased at least one book, compared to 29.6 million in 2017, representing a growth of 300,000 people from one year to the next. This growth is particularly significant in the age groups where there has been the greatest departure from reading, with a 15.2% increase in the 20-29 age group and a 15.8% increase in the 30-39 age group.

Trend and genre quotes

Non-fiction books saw the best result in 2018, with a 5.5% increase compared to 2017, largely due to the success of Michelle Obama's autobiography, which reached the top of the

²⁸ Rapporto sullo stato dell'editoria in Italia 2019, Ufficio studi AIE, p. 71

non-fiction best-seller list within a few weeks of its publication in Germany. Children's and young adult books also saw a positive trend, with a 3.2% increase compared to 2017, as well as titles in the social sciences, law, and economics, which saw a 2.2% increase. On the other hand, fiction saw a decline of 0.9%, while the most significant decrease in sales was in the natural sciences, medicine, computing, and technology, with a -4.7% decrease.

If the best-selling non-fiction list is dominated by international authors, the fiction list is led by German writers. The best-selling fiction book of 2018 was "Der Insasse" by German writer Sebastian Fitzek, followed by the original version of the new science fiction thriller by Franz Schatzing, "La tirannia della farfalla." The decline in sales of fiction and natural sciences, medicine, computing, and technology books highlights the need for publishers to continue adapting to the changing reading habits of German consumers. Nevertheless, the overall stability of the market and the increase in the number of book buyers shows a positive sign for the future of the German book market.

Book Market revenue: 0,0%

GDP trend: 1,5%

United Kingdom

The United Kingdom's political and economic landscape has been tumultuous in recent years, primarily due to the country's efforts to negotiate its exit from the European Union. This process created significant uncertainty and affected various sectors, including the book market. In 2018 and 2019, the British economy experienced deep uncertainty due to the difficult negotiations, leading to the resignation of Prime Minister Theresa May on May 24th, 2019, and the subsequent election of Boris Johnson as the leader of the Conservative party. On July 24th, 2019, Johnson became the new Prime Minister of the United Kingdom, announcing the date of October 31st for Brexit, with or without an agreement with the EU. As a result, many industries faced challenges in forecasting future demands, with the book market being one of them. In this complex scenario, the book market, both in print and digital format, saw a contraction of around 2.7% in 2019, with a turnover of £3.6 billion (around 4 billion euros).

The decline in the book market was mainly due to the negative performance of the physical book, which recorded a -5% compared to 2017. On the other hand, the result of digital formats was positive, with a turnover of £653 million and a +5%, always compared to 2017. This trend may reflect broader changes in consumer behavior as more people turn to digital media.

Trend and genre shares

Data published in the annual report of the Publishers Association show a decline in the performance of fiction books and an increase in those of non-fiction and children's and young adult books. In particular, fiction recorded a contraction of 3%, with a turnover of £588 million, also due to the reduction in sales of physical books (-7% against +4% of digital formats). In contrast, non-fiction overall obtained +1%, and the children and young adult sector recorded a 3% increase.

The educational sector suffered the most significant decline, with a 6% drop in turnover, reaching £319 million. This decline may be related to the uncertain climate in the education sector, as schools, colleges, and universities struggled to adapt to the ongoing COVID-19 pandemic. Similarly, the academic-professional sector recorded a -9% and a turnover of £1.1 billion. This sector is particularly sensitive to economic changes, and the ongoing uncertainty and challenges related to Brexit may have played a role in this decline.

The difference in performance between physical and digital books was most notable in the academic-professional sector, where physical book sales declined by 13%, but digital sales increased by 7%. This trend may indicate that academic and professional readers are increasingly looking for digital formats that can be easily accessed and are often more affordable than their print counterparts.

Overall, the UK book market faced a challenging environment in 2019 due to political and economic uncertainty. However, the trend towards increased sales of digital books indicates that the industry is evolving and adapting to changing consumer preferences. It remains to be seen how the ongoing Brexit negotiations and the COVID-19 pandemic will continue to shape the UK book market in the coming years.

Digital Sector

The digital sector makes up roughly 18% of the book market in trade channels, with audiobooks experiencing significant growth at a rate of +43% compared to 2017, albeit from a small base, while e-books have seen their revenue decrease for the fourth consecutive year, with a -2% compared to the previous year.

Translated titles from other languages

Despite the uncertainty surrounding Brexit, data from Nielsen indicates that the UK remains interested in international literature and continues to maintain and strengthen its relationships with European countries. In 2018, sales of translated narrative titles increased by 5.5%, reaching a turnover of 20.7 million pounds in trade channels. The subcategory of "general narrative in translation" saw an even more significant growth with a +20%, while the

corresponding subcategory of original works in English remained relatively stable.

Translated narrative now accounts for 5.63% of total sales in the UK book market, nearly double the 3% of just a few years ago. Most of the translated titles are from European languages, with French being the most translated language, representing 17% of total copies sold, followed by Norwegian, Swedish, Japanese, German, and Italian.

In terms of new titles published, Norwegian and Swedish literature have seen a real boom in the last five years, and this is also true in terms of the number of copies sold in 2018. Two of the most popular translated titles in 2018 were by Norwegian writer Jo Nesbø, with *Seven* and *Macbeth* selling 123,066 and 111,206 copies respectively. Elena Ferrante's *"L'amica geniale"* also performed well in English translation, selling 26,627 copies, along with Elena Varvello's *"La vita felice,"* which sold 18,897 copies.

Book Market revenue: -2,7%

GDP trend: 1,4%

Spain

The publishing industry in Spain is showing signs of both growth and contraction, with the print book driving the market while the digital format is experiencing fatigue. The Federación de Gremios de Editores de España (FGEE) recently released their annual report, *Análisis del Mercado Editorial en España*, which provides insight into the health of the sector. According to the report, the total revenue in 2018 was 2.36 billion euros, representing a growth of 1.9% compared to the previous year. However, the school text category recorded the only negative performance among the main editorial categories, with a decline of 4.2% compared to 2017, which had a significant impact on the overall results.

If we exclude the school text category, the overall market shows a growth of around 4.7% compared to 2017. The positive sign in 2018 fits into the gradual recovery trend that has characterized the editorial sector in recent years. In 2014, the sector saw a weak increase in revenue of 0.6% compared to 2013, after several years of negative trends. However, despite this growth trend, the sector has not yet been able to recover from the vertical drop recorded during the crisis. In fact, from 2008, a total of 25.8% in value has been lost.

Trend of genres

Looking at the performance of various genres, 2018 saw a positive sign for all the main categories except school texts. The fiction category showed the highest growth, with a revenue increase of 8.1%, totaling 488.2 million euros. The children's and young people's book category followed closely behind with a growth of 6.0%, amounting to 303.3 million euros. Non-fiction also experienced a positive trend, with a growth of 3.7%, totaling 696.6 million euros.

However, the number of published titles recorded a significant decline of 12.7%, reaching 76,202 titles, which is a worrying trend. Additionally, the average print run decreased by 5.8%, reaching 3,762 copies per title. This trend could be an indicator of decreased investment in new content and potentially stifle future growth. On a positive note, the average price of books in Spain was around 13.96 euros, which could signal increased willingness from consumers to invest in high-quality books.

Revenue concentration and market shares

The Spanish publishing sector remains concentrated in the cities of Barcelona and Madrid. According to the Federación de Gremios de Editores de España (FGEE), these two cities together generated 93.2% of the total revenue in 2018. In fact, Barcelona companies alone accounted for 50.8% of the revenue, while Madrid contributed 42.4%.

This year's edition of the FGEE report also provides insights into market shares according to

the size of the publishing house. As expected, it is the large publishing companies that generate the majority of the sector's revenue at a national level, accounting for 62.1% of the total. Medium-sized companies follow, with 24.5% of the revenue, while smaller companies generate 13.6%. This suggests that the publishing industry is dominated by a few large players, which may present challenges for smaller and independent publishers.

Sales Channels

The FGEE report reveals that bookstores remain the main channel for buying books in Spain, representing 53.0% of the total revenue. However, there was a significant growth in online book sales in 2018, with a 7.6% increase compared to the previous year. This indicates that more and more people in Spain are turning to online channels for buying books.

Digital Market

The digital book market in Spain has seen less favorable times in recent years, with revenue remaining unchanged in 2018 and standing at 119.0 million euros. This is a significant departure from the positive trends of previous years, such as the 1.6% growth in 2017, 1.5% growth in 2016, 4.9% growth in 2015, and even a 37.3% growth in 2014. Despite this, the digital book market still had a considerable impact on the total Spanish market, accounting for 5.0% of the total revenue in 2018.

The number of digital format titles published in 2018 decreased significantly, with 19,236 titles representing a 29.7% decline compared to 2017. This may suggest that publishers are less interested in producing digital books, or that they are investing less in marketing these books to consumers. However, the digital format catalog available for sale still comprises a total of 178,908 titles, which is a 0.4% increase compared to the previous year.

Overall, while the print book market continues to grow in Spain, the digital book market has faced some challenges in recent years. However, the growth in online book sales suggests that people are still interested in buying books, albeit through different channels. It will be interesting to see how the industry continues to evolve in the coming years, and how publishers will adapt to the changing landscape of the market.

Denmark

According to the Danish Publishers Association's annual market report, the Danish book market in 2018 remained largely stable, with a boom in audiobook sales. The total revenue from the sale of both paper and digital books was DKK 1.716.5 million (approximately EUR 230 million), which was a decrease of -0.4% compared to the previous year. Although paper books

remained the most popular choice among readers, digital sales increased and accounted for 20.6% of total sales, compared to 18.5% in 2017.

Genre trends

In terms of genre trends, sales for fiction and non-fiction both decreased (-3.6% and -2.7%, respectively), while the revenue generated by books for children and young adults increased by 1.6%. The negative performance of fiction was mainly due to the absence of strong bestsellers, which was in contrast to the +5.6% increase seen in 2017, thanks to the success of titles such as Dan Brown's *Origin* and Ken Follett's *The Column of Fire*.

Digital

Regarding the digital market, a decline was observed in the incidence of e-books, which accounted for 16.7% of total digital formats in 2018, compared to 18.4% in the previous year. Meanwhile, audiobooks continued to grow in popularity, making up 28.3% of the digital market in 2018, compared to 27.3% in 2017. Among digital formats, audiobooks recorded the largest sales increase in 2018, with a turnover of DKK 100 million, a +14.7% increase compared to 2017, while e-books experienced a decrease in sales.

Book market revenue -0.4%

GDP trend +2.2%

Netherlands

According to data released by KvB Boekwerk and Gfk, the Dutch book market has remained largely stable in 2018 with a slight increase in value due to higher prices for both books and e-books. The turnover increased by 2.1% to 541 million euros, while the copies sold decreased slightly from 41.2 million in 2017 to 40.9 million in 2018. The average price of books increased by 2.5% to 13.10 euros and that of e-books by 3.5% to 8.95 euros. However, the number of books sold is still lower than before the economic crisis, with an average of 2.4 books per head in 2018, compared to 3.1 in 2008.

Digital

E-book sales have gradually increased compared to total book sales in recent years, accounting for 7.6% of total sales of trade channels in 2018, up from 7.4% in 2017.

Genre trend and share

In terms of genre trends, narrative remains the largest category of books sold, representing 39% of sales, but has declined in recent years from 43% in 2012. Children's and young people's books have grown progressively and accounted for 26% of total sales in 2017, compared to 21% in 2012. The non-fiction category remained stable at 29% in 2012 and increased to 31%

in 2017. Four out of five books are still purchased at a physical point of sale, such as bookstores and stationery stores, while the rest are bought online. Despite showing a slight increase in value, the Dutch book market is still recovering from the economic crisis as it has not yet reached the number of books sold in 2008.

Book market turnover +2.1%

GDP trend +2.7%

Russia

In 2018, Italy was the honored country at the Moscow Fiction/Non Fiction Book Fair held from November 28th to December 2nd. The Italian Publishers Association (AIE) played a significant role in the cultural program's organization and the coordination of the business area for B2B meetings and the library for the exhibition and sale of books by Italian authors written in Italian and Russian translation.

The event was a great success with 12 publishers present, and the Italy Pavilion saw 250 appointments with publishers, with many deals activated and concluded. The event provided an opportunity to review the evolution of the sale of rights between Italy and Russia and to propose initiatives for further development of relations and collaboration projects.

The partnership between the two countries is evident from the increase in the sale of rights to Italian titles in Russia, even within editorial trends that are not always linear. In a context where Europe remains the primary exchange market for the publishing industry, covering approximately 50-52% of the sale of edition rights, the Russian publishing industry accounted for over 4% of these sales in 2017, which was just over 2% in 2007.

The purchase of rights to titles by Russian authors by Italian publishing houses has remained stable. However, it is noteworthy that many classics of Russian literature are in the catalog of books in commerce, with 2,695 titles of fiction by Russian authors from the 19th and 20th centuries.

Book Market Revenue

According to the results made public in October of the last year, 2018 was a year characterized by a strong growth trend in the Russian book market. Non-fiction and fiction, e-books, and audio books showed particularly positive results, with an increasing impact of online sales. The market has grown in value by 7% to 8%, reaching a turnover of 79 billion rubles (about 1.1 billion euros). For 2019, a positive sign is expected, which should lead the sector to a turnover of around 83 billion rubles. The figures reflect the positive trend in the

Russian book market and the growing interest in Italian literature and culture, making it a potential market for Italian publishers.

Digital

In Russia, the book market is seeing a rise in e-books and audio books, with e-book sales increasing by 30% and audio books generating a turnover of 500 million rubles. The digital market in Russia is valued at 3.7 billion rubles, and LitRes and Storytel dominate this market. LitRes is a major digital content retailer, especially for e-books, and has a 57% share of the audio book market. In 2017, LitRes experienced a 72% increase in audio book sales, and by 2018, its sales volume had increased by 19%. On the other hand, Storytel arrived in Russia in 2017, and has a 15% share of the market, which is similar to the share held by the traditional sector in Italy.

Sales channels

Despite the rise of online stores, physical libraries, whether independent or chain, remain the primary channel for book sales in Russia. Ozon.ru and Labyrinth are two of the major online bookstores in Russia. Sales volumes for Ozon.ru grew by an estimated 40% in 2018, and around 14 million books were sold on the website in 2017, generating a turnover of 4.6 billion rubles. In terms of books sold online in Russia, Ozon.ru accounts for 35% of the total.

Genre trends

In 2018, non-fiction books experienced the highest growth rate among all book genres, with an 18.5% increase and a turnover of 2 billion rubles. This growth rate was nearly double that of fiction and children's and young adult books, highlighting the significant increase in non-fiction compared to the 2% growth rate in 2017. In 2018, the book market turnover increased by 7.5%, while GDP increased by 2.3%.

Book market turnover +7.5%

GDP trend +2.3%

Sweden

Sweden's international reputation remains strong due to its robust economic and productive structure, a focus on technological innovation, low unemployment, and high female participation in the workforce. In 2018, the country's GDP saw a growth of 2.4%, following a 2.5% increase in 2017. Additionally, data from the Swedish Publishers Association (Svenska Förläggareföreningen) reveals that the book market experienced growth in 2018, with an increase in both value and copies sold, equivalent to 5% and 3%, respectively. The total turnover from publisher sales across major channels rose from SEK 1,786.7 million in 2017 to

SEK 1,875.5 million in 2018 (approximately SEK 184 million), largely due to the positive performance of top titles by Swedish authors such as Hans Rosling, Lars Kepler, and Thomas Erikson.

Genre trend

In terms of genre trends, non-fiction book sales saw a significant boom in 2018, with a 26.3% increase in value compared to the previous year. Sales turnover increased from SEK 325.1 million to SEK 410.5 million. Children's and young adult books also experienced growth (3.5%), while sales for fiction remained largely stable (0.6%).

Digital

The growth of digital sales continued in 2018, primarily due to the success of audiobooks. Sales of non-fiction audiobooks increased by 22.9% in value compared to the previous year, while sales of audiobooks for children increased by 129.8%. Digital formats now account for 23% of book market sales.

Best

sellers

In terms of bestsellers, local authors dominate the book sales charts in Sweden, as is common in all Nordic countries. However, three books by Italian authors made the top rankings in 2018, including two books by Elena Ferrante and one by Francesca Cavallo and Elena Favilli. Ferrante's books "Story of the Lost Child" and "Story of Those Who Leave and Those Who Stay" ranked in seventh and eleventh place in the fiction chart, respectively, while Cavallo and Favilli's book "Bedtime Stories for Rebel Girls" took second place in the children's book chart. The success of these international authors demonstrates the potential of the Swedish publishing sector and the ability of Swedish authors to capture the attention of readers beyond linguistic and geographic boundaries.

Book market revenue +5.0%. GDP Trend +2.4%

TAB.22 PRIMI 20 EDITORI E MARCHI EDITORIALI PER TITOLI DI E-BOOK PUBBLICATI: 2017-2018
Valori in numero di titoli e in %

2017				2018			
Ranking	Editore ¹	Titoli	%	Ranking	Editore ¹	Titoli	%
1	Harper Collins Italia	1.613	2,43%	1	Harper Collins Italia	1.531	2,98%
2	Newton Compton	1.322	1,99%	2	Franco Angeli	937	1,82%
3	Franco Angeli	876	1,32%	3	Newton Compton	858	1,67%
4	A.Mondadori	466	0,67%	4	Bompiani	749	1,46%
5	Giappichelli	448	0,67%	5	Giunti Editore	671	1,31%
6	Gangemi	353	0,53%	6	A.Mondadori	671	1,31%
7	Feltrinelli	305	0,46%	7	Giappichelli	341	0,66%
8	Bompiani	289	0,43%	8	Feltrinelli	317	0,62%
9	Giunti editore	253	0,38%	9	Il Sole 24 Ore	297	0,58%
10	Il Sole 24 Ore	249	0,37%	10	Giulio Einaudi	250	0,49%
11	Garzanti libri	245	0,37%	11	Mimesis	222	0,43%
12	Rizzoli	169	0,25%	12	Rizzoli	219	0,43%
13	San Paolo Edizioni	166	0,25%	13	Garzanti Libri	216	0,42%
14	Laterza	155	0,23%	14	Demetra	207	0,40%
15	Longanesi	150	0,23%	15	Laterza	190	0,37%
16	Giulio Einaudi	148	0,22%	16	Panini Comix	187	0,36%
17	De Agostini	146	0,22%	17	Piemme	183	0,36%
18	UTET	145	0,22%	18	Gangemi	180	0,35%
19	Rosenberg & Sellier	144	0,22%	19	Ipsosa	176	0,34%
20	EGEA	140	0,21%	20	Sperling & Kupfer	174	0,34%

¹ O marchio editoriale (con Isbn diverso). Bisogna tener presente che alcuni valori di produzione possono dipendere dal fatto che in quell'anno l'editore ha deciso una massiccia conversione (in formati diversi: ePub, ecc.) dell'edizione cartacea in versioni e-book
Fonte: Elaborazione Ufficio studi AIE su dati IE-Informazioni editoriali

Rapporto sullo stato dell'editoria in Italia 2019, Ufficio studi AIE²⁹

²⁹Rapporto sullo stato dell'editoria in Italia 2019, Ufficio studi AIE, p. 96

Chapter 5

Readers and editors: how the publishing market in Italy is communicating with public

In this chapter, I will summarize the interview between the translator, influencer and art director Tiffany Vecchiotti and Giulio Passerini, Communication Manager and editor of the book series ‘Gli Intramontabili’ at Edizioni E/O. The following interview will focus on analysing the book market from the point of view of both readers and editors. It is a conversation about publishing and communication. The main points will cover the new DDL S. 1421 - 18^a Legislatura - Senato³⁰ on February 13th, 2020 in support of the independent bookstores; moving on to the criteria that are taken in consideration for the average price of the book, the Unique Selling Proposition³¹ of the bookstore owners, the relationship between bookstores owners and readers and the pros and cons of the services offered by the former. Another focus will be on the lack of communication and planning of events in the bookstores, the possibility to launch new formats to promote said events and the challenges that the publishing houses go through when launching and promoting a new book. From a reader standpoint, the general opinion regarding the book that still views it as something aimed to a more educated part of the population and an industry that still classifies A-tier readers and B-tier readers (as well as genres like young adult or fantasy), how the newspapers talk to an older public promoting the same narrative over and over and the e-book as a medium and its price in Italy.

Finally, there will be a discussion about the distribution of the e-books and the digital books in general in the Italian publishing market and it is worth mentioning that E/O is not available on Amazon because of their choice and regulation about the e-commerce.

The new DDL S. 1421, effects and reactions.

Giulio Passerini starts saying that that law is not perfect and it should have been focused more on libraries. Libraries are the most important touchpoint between publishing houses and readers, because it’s where new readers can discover new books. The law should have been more focused on how to market and sell Italian authors abroad, on a more international point

30 Law n. 15/20 of February 13th 2020, GU n. 63 in March 10th 2020.

³¹ A unique selling proposition, more commonly referred to as a USP, is the one thing that makes your business better than the competition. It's a specific benefit that makes your business stand out when compared to other businesses in your market.

of view also for what concern Italian writers copyrights and also also financing the translation of books from Italian to English, French, Spanish and more, in order to reach foreigners markets.

This law also tackles the discount on books and regulates how often the discount can be made by the publishing houses and Passerini is supporting this aspect stating that is more in line with the French book market for example.

According to the law, the discount applied to books on Amazon and other websites went from 25% to 5% and Passerini says that despite readers not understanding this process it was necessary for all the publishing houses since the mark up of the publishing industry are very low especially for authors and booksellers. To give some data the author can get from the cover price from a minimum of 4% to a maximum of 16-18%, the distribution instead earn the 50% of the cover price, the bookseller earn less than the 20-30% according to the agreement between the publisher and the bookseller.

The law has been made to help the subject in the supply chain that cannot face huge discount like the independent booksellers.

The publisher cannot grant them high discount as in the case of Amazon or great distribution because the quantity they order are of course less.

The costs that an independent bookstore has to face are already higher than the ones faced by the online retailer for example. For this reason, who benefits the most from this law is the independent bookseller. They are important because they make the reader discover new books, even books that are totally different from their taste or books that they would never buy because of the knowledge of the bookseller, this is something that is missing in online retailers and in the GDO. The bookseller also can create a long-lasting relationship between the reader and the publisher and make the reader more informed, more sensitive, more curious to the book market industry. The booksellers themselves are extremely important in small realities where they became a sort of institution that create a sense of culture for the all community.

On the subject Tiffany Vecchietti differs saying that they have a totally different views. First of all, according to her, for what concern the law about the promotion of reading we need to highlight the fact that even though the law is already active there are no funds that have been allocated in order to archive the main goals of the law itself, so this basically means that the library will not have any funds at all, the law has been made to help the libraries through some initiatives that are not specified so it is difficult to understand how with no money and any concrete plans the government want to help them. With no funds the library will not be

able to expand their catalogues with the new releases and this is the main obstacle when it comes to attract new readers, especially those readers that belong to the lower class and are not able to buy any books at all.

Passerini agrees when it comes to library and share its experience in Milan and Palermo: “I’ve used the library in two regions in Lombardy and in Sicily. The library in Lombardy has always been well furnished also with new releases, the employers were well informed as well, and they were opened all day. In Sicily instead everything is different, the libraries are not furnished, the employers are poorly trained especially with the new technologies and the social media, there are poor infrastructure, borrowing a book in Palermo is extremely difficult, last time I went to the library in Palermo it took me 40 minutes to borrow a book. On the other hand, in Milan you only need your fiscal code and in 15 minutes you get the book. Also, in Milan students are used to this medium since middle school, while in Sicily you don’t even know that actually there is a library.”

To this, Vecchietti follows stating that The main problem in Italy is the digitalization. Italy is poorly digitalized and this of course affects the libraries as well. It’s even more obvious now than in the past, and the gap between places where you don’t have funds and subsidies like in the South is even bigger. She then moves on talking about the law, saying that it may have made happy the booksellers but sad and angry the readers. She explains that despite the law being more aligned with the market in France and Germany, as Passerini stated earlier, there are other factors that need to be considered like purchase power and the average price of books. It’s true that in Germany the average price of books is almost like the Italian one but the purchasing power is totally different. The average cost of books in Italy is 18 euros, the average price in the UK is 7£.

Passerini then follows explaining that it’s more about profits and losses: selling 10.000 copies of a book can reduce the price because the break-even point will be lower. Since in Italy this is not the case, (the average sale of a book is very low around 150/180 copies), and we should think of the Italian publishing market in terms of small publishing houses.

Vecchietti then shares her personal experiences as a reader and as someone who works in marketing, and states that the perception from a reader's point of view is that the publishing industry does not take responsibility for its problems and instead, it is the reader who is expected to make changes. Passerini agrees and adds that the publishing industry should let readers read in any way they want and that the recently introduced law is not against Amazon, but for independent booksellers to be dynamic and adapt to change. He stressed the importance of creating multiple shopping experiences for different readers and building

relationships through books.

Tiffany Vecchietti shared her differing views, stating that she has found relationships online and not in independent bookshops, and that the quality of service offered by booksellers is often poor. She also expressed her disagreement with the law, saying that it supports booksellers instead of reading and that independent bookshops are stuck in the past. Passerini concluded by mentioning his discussions with a friend about why independent bookshops don't have e-commerce, pointing out that the main difference is that the craftsman sells his own products and are considered USP

Communications and e-books: what is cultural and what is economics

Giulio Passerini, talks about small bookstores that are a reality in Italy and how they should be more promoted and have more visibility and protected by the laws. On the flip-side, Tiffany Vecchietti argues that as much as the small bookstores represent something traditional and important for the Italian publishing industry and history in general, the fact that today smaller and independent bookstores are using the old approach of the word of mouth as a marketing strategy, is like dismissing a bigger problem and ignoring that there are different ways to do marketing and to attract people and to still keep independent bookstores alive and preserved as something part of Italian history and tradition that includes new mediums of communication.

Passerini replies that he agrees on the communication aspect: as someone in charge of the press and communication, he thinks that the format of holding an event for a book presentation with journalists in a bookstore is outdated as a method, and they're trying to make changes but it's a slow process since the people involved are editors, authors and bookstore owners and it's hard to find a common ground because everyone is holding onto their own ideas and it makes the process of innovation much harder.

When discussing about advertising the book as a product, Giulio Passerini explains that he thinks the main focus for them as a publishing house for a new release is making an advertisement campaign in-store or, in general, in-person, something that a reader and potential buyer can feel in order to create an experience rather than a fully online promotion that, in his opinion, works better for books that are not exactly new, like a sequel of a series or a new release from a well-known author.

For Tiffany Vecchietti, the concept of communication and advertisement is broader, it doesn't have to be so selective and it's leaning more towards an online presence that seems to be necessary if we look at how the world and the economy in general is moving. He states that

being on the web for a new release is actually a valid way of marketing because you can reach a broader audience that can convert into sales.

She also mentions the fact that a publishing house and their editors should work on their branding because the idea of associating an offer to a specific publishing house is actually something that can influence the reader and help making a connection.

Giulio Passerini expresses his gratitude for the consideration and he appreciates that she's giving this opinion but at the same time, he says that this is something that could be done in the past, but not now. The main target of the publishing houses now, and the metric that really makes them understand if their sales and strategy is effective, is only when they can reach people who are not considered "strong" readers because they need to be more persuaded to buy a book. If an advertisement and a marketing strategy is going well, it means converting an occasional reader into a regular reader was a success as well as appealing to a public that was not interested before. The main goal of the marketing and promotion in the bookstores, according to Giulio Passerini, is not selling a book, but rather setting a starting point for the book to be picked up by the right people and let the word of mouth do the rest. They later talk about how in Italy people read fewer books year after year and that's a big problem in terms of innovation for the industry. Giulio Passerini states that if the industry would grow of 1-2 million readers it would change everything completely (1h21).

Another subject tackled concerned the e-book situation in Italy in terms of distribution and prices.

Tiffany Vecchietti starts with the question: "Why are e-books so expensive in Italy compared to the paperback and the foreign market?" Giulio Passerini explains that some factors that influences the prices are of economic nature. For example, the net income for the re-sell is the same or slightly more compared to the paperback version, what goes to author rights is more for the digital version than for the hardcopy, and for the distribution channel, it usually takes half the price even for e-books, for reasons related to cash flow management and other technical aspects. If there was only one websites that distributed e-books, there wouldn't be any problem but since this is not the case, the case is more complicated. So, even if the editors don't take a big percentage because the printing cost is cut, there has to be some margin and the ratio with the other parties has to be kept. Moreover, the e-books in Italy don't convert well in terms of sales (5% - 8% of the industry).

He then moves onto analysing rather the perception that the consumer has of the price of the e-book and why the readers perceive it as "expensive". In Italy, the market for digital books is

shaped in a way that sees the paperback reader and the e-book reader separated, for the most part: there are very few people who only read ebook, the majority of the readers buy the paperback and another category is represented by people who buy both paperback and ebook almost evenly. However, this is a generalisation that we don't have to take too strictly because there are some genres like fantasy, romance, essay and books related to self-improvement, and those books that usually after a year are considered not relevant anymore; the digital copies sold for these genres are significant and it's a data that needs to be taken in consideration.

Why as a reader someone think that an e-book in Italy is expensive? In reality, in terms of market price, it's not expensive. It's all because of the association that people make with the paperback and the experience that comes with it: when buying a book, you think of holding something physical, of going to a bookstore and having a whole experience that is more immersive and that you feel like you don't have when you're buying a digital copy hence you shouldn't pay the same price. On the other side, someone who buys an e-book intentionally, is more satisfied and doesn't feel the gap since it meets his expectations.

There is also another element, according to Passerini, that is cultural, concerning the publishing market: all the industries that went through a digitalisation of their core content grew exponentially in few years following the technology speed while the publishing industry did not. The e-book has been around for decades, but it started rising only in the last decade and it went from a 0% to a 5% which is basically nothing. For this reason, it wouldn't be fair to consider the rise of the e-books in Italy slow only for an economic factor but there is something deeper that needs to be taken in consideration which is possibly connected to the idea of the book in Italy and the experience that a reader seek when buying a book, so when something that should be a support and functional like a bookstore is part of the experience. Passerini concludes saying that, the price factor is important but he doesn't think it is as important as the experience that the reader is looking for and that cannot yet be replicated when buying a digital copy.

At this point Tiffany Vecchietti digs deeper into the subject asking another question from a reader point of view. She states that unfortunately, a book is not just a reading so for this reason a book has a physical process that cannot be ignored nor cut when you're producing a paperback. On the contrary, an e-book, is literally a file that once uploaded on different platforms and sent to different distributors, according to marketing laws, once you produce something digital that can be replicated endlessly without you producing anything new, it means your revenue can be quite high. For me at least, the price is a big factor when debating

whether to buy the hardcopy or the digital copy and I think that it might have influenced the rise of the ebook in Italy as well.

To which Passerini answers that he agrees that the price can influence a decision but the prices that ebooks have now in Italy are also a result of experiments made through the year where the e-book were cheaper and it's also based on the selling experience. I think the problem is still that there are people who don't fully understand what is an e-book and we as editors need to understand if that type of potential buyers would actually be interested in a digital copy and convert into sales.

2022 report on the future of the publishing industry: 'What are we reading next year'

The meeting to present the 2022 report on the future of publishing was held at the Giangiacomo Feltrinelli Foundation in November 18, 2022. The report aimed to answer the question of "What will we read next year?" and was moderated by the director of the Foundation, Massimiliano Tarantino. The guests present included professionals from the publishing industry and academia, such as Carlo Antonelli (International Business Director of the Milan Fair), Alessandra Carra (CEO of the Feltrinelli Group), Paolo Costa (a professor of Communication and Modern Philology), and Paola Dubini (a professor of Management and editor of the report).

The report emphasized the importance of publishers to have a far-sighted and demanding approach to the purposes of using digital technology. The report proposed to start from the bottom, meaning starting from reading behaviors, and starting from the surroundings, acknowledging the increased offer of cultural products in recent years. The report discussed the idea that reading has taken on many forms, practices, and experiences and that there is no rigid relationship between the medium and approach to reading.

Alessandra Carra stressed the importance of bookstores and publishers in adapting to social changes, including the crucial theme of young people. The report also noted the ongoing transformations affecting the management of authors and copyrights. The conclusion of the report, by Bruno Pischetta, stated that the book is trying to regain strength and that it is up to publishers to bring the Gutenberg experiment into the future:

We are still in a massified cultural dimension, where interclassism and cosmopolitanism have decisive value. But each of the phenomena that we have called here in a sample way indicates evolution, perhaps antithetical perspectives, according to which the book tries to regain strength on the basis of inexhaustible variations. The Gutenberg experiment seems

far from over, and it is up to the most enterprising, beyond nostalgia and technical adorations, to ferry it into the future.³²

³² Alla Fondazione Giangiacomo Feltrinelli si indaga sul futuro dell'editoria, 2022, Mare mosso, 21 novembre, <https://maremosso.lafeltrinelli.it/news/fondazione-feltrinelli-bookcity-futuro-editoria>

Conclusion

In conclusion, the Italian publishing industry has undergone significant changes and evolution over the past few decades. With the rise of prominent names in the industry, the backbone of the market was shaped with unique publishing strategies, attention to image rights and copyrights, and a love for the idea of a “well-made book”. However, the market faces challenges and limitations in terms of its goals and actual marketing strategy, as well as the gap between the aim of selling large quantities of books while targeting an elitist audience and the potential for a larger market through mass production. The impact of the increasing popularity of e-books in the early 2000s and the shift towards digital books during the COVID-19 pandemic has also had an impact on the publishing industry.

The 2022 report on the future of publishing highlights the need for a change in the approach of the publishing industry to reach a broader audience, adapt to new mediums of communication, and stay relevant in an ever-changing market. Publishers need to have a far-sighted and demanding approach to using digital technology and be able to adapt to social changes. The book is trying to regain strength, and it is up to publishers to bring the Gutenberg experiment into the future. The publishing industry in Italy has a lot of potential for growth and success in the future, but it is crucial for publishers to understand the challenges and limitations and adapt accordingly.

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