

Success Stories and Witch Hunts – Women in Book Publishing

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1. Introduction

In 1984, the most prestigious German publishing company *Suhrkamp* brought Roland Barthes' biography of one of his favourite writers of the 19th century to light: Jules Michelet². A chef-d'oeuvre of this French historian, which Barthes discusses with great care in his book, is about the myth and social role of witchcraft.³ For Michelet, the history of witches has been closely connected with the discrimination and oppression of women.

It is, of course, pure coincidence, that some 20 years later Suhrkamp became itself the object of an unprecedented "witch-hunt". When the last patron of the company, Siegfried Unseld, died in the Autumn of 2002, his wife, Ulla Unseld-Berkéwicz, took over the management of the business, causing what the French daily *Le Monde* (06.05.2004) saw as massive public "power struggles and internal thunderstorms". The son of Unseld fought a public war with his stepmother (who owns a share of 51% of the company's stocks). Important authors such as Martin Walser defected to other publishers, the director of editing and other staff members left and the advisory board composed of such venerable men as Hans-Magnus Enzensberger or Adolf Muschg dissolved itself. Critics attested that Mrs. Berkéwicz, who had assisted her husband in directing the company over many years, could never be a suitable successor and take over the top position of Suhrkamp, a house that had become "synonymous with intellectual aristocracy" (*The Guardian*, 01.11.2002) and a symbol for the best tradition of European publishing with authors such as Ingeborg Bachmann, Norbert Elias, Michel Foucault, Hermann Hesse, James Joyce, Karl Kraus, Nelly Sachs, Claude Lévi-Strauss, Marcel Proust or Jorge Semprun. Some even whispered about her "esoteric mind" with no other concrete proof than that of the style – supposedly a "black mass" – in which her husband's funeral had been organized.⁴

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² Barthes, Roland: *Michelet*. Frankfurt am Main: Suhrkamp, 1984.

³ English translation: Michelet, Jules: *Satanism and Witchcraft: A Study in Medieval Superstition*. New York: 1992.

⁴ So the arguments of critic Marius Meller in: *Der Tagesspiegel* (Berlin), 17.10.2003.

However, if seen from another perspective – as no real changes in the editorial policy of Suhrkamp took place after the death of Unseld – one could hardly overlook the fact that, with the exception of Ulla Unseld-Berkéwicz herself, all of the main actors in the fight were men. Since most of the latter have been leading figures in German literary life during the last 30-50 years, could it be that we witnessed a final rebellion of traditional power figures against new realities in publishing and also against their inevitable loss of influence? Or, is the time still not ripe for women to occupy top positions in major publishing houses? If empirical trends were to show no real progress in gender diversity at decision making levels, what could be the main obstacles for women rising to the top?

During the past 1 ½ years, the *Culture-Biz* team has studied these and similar questions, with particular emphasis on the publishing business in Austria, Finland, Germany and Portugal. In addition to providing overviews of domestic publishing industries, trends in the labour market were observed, training opportunities evaluated, interviews with key figures and newcomers conducted, statistics on leading positions generated and other information on this market recorded. The reports of the national teams come up with a variety of answers – some of them quite surprising – which are summarised and, where possible, compared in this introductory chapter. While the main emphasis of *Culture-Biz* lies on the evaluation of gender-differences in decision-making positions at different stages of the book production and distribution chain, the authors of the reports did not forget, during their qualitative and quantitative work, to “recognize both the cultural and economic significance of the book sector”.⁵

From a more theoretical side, this should remind us of the *communicative processes* of contemporary cultural production where more than just a single creative mind is involved. Philosopher Jürgen Habermas⁶ sees “communicative action” taking place in the “lifeworld”, as opposed to systems where only power and money strategies reign. For him, interaction can be facilitated through a “communality of mutual comprehension” which is based on the recognition of the compatibility of individual value claims. Shared communicative action towards achieving a common end, such as a literary work, should then lead to a publishing and management concept that goes beyond the rationalities of returns on investment or of the technical side of production. A “cultural” understanding of the communicative process involved would comprise all actors, authors or translators, the decision

⁵ As called for in the Resolution of the European Expert Conference “What Future for European Books?”, held under the Greek Presidency of the EU, Athens, April 10 and 11, 2003.

⁶ Habermas, Jürgen: *The Theory of Communicative Action*. Vol. I and II, London 1981 and Cambridge 1987.

makers and the regular staff in publishing houses, distribution companies and book shops. As well, it should even include the end-users of a book, who are not simply the “customers” of a ready-made product but rather participants in the process, with their own potential for individual action. As author Salman Rushdie reminds us:

“If books are able to generate love as well as hatred, we have a proof for their potential to alter existing conditions... Tyrants fear the truth of books, since it is not obliged to anyone. They fear it, in particular, because this truth is incomplete, has to be completed by the readers themselves; so in the end, the truth of a book looks a bit different for every reader. This is exactly the real, revolutionary power of literature: it emerges from these invisible, intimate talks between strangers, from these small revolutions in the minds of the readers.”⁷

Obviously, women should have an adequate role when it comes to setting free this kind of power of ideas and values in a new book or series, but also as regards decision-making on the future orientation of publishing in the overall culture and media industries – not the least because of the fact that women account for the majority of book readers.⁸

2. Book-Biz – Between Market Forces, Technological Innovation and Public Intervention

In contrast to film production, where most of the private companies could not sustain their activities without direct, production- and distribution-related public subsidies or at least co-operation (orders, co-productions) with public broadcasters/TV companies, book publishing appears to be, at first sight, a separate economic field where most activities are carried out by profit-oriented business enterprises under strict market conditions. In all four countries participating in the Culture Biz study, this concerns the whole value chain, starting with the preparation of content and the production process as well as the distribution and the retail sales. A second look, however, shows a somewhat different picture:

⁷ Frankfurter Allgemeine Zeitung, 16.07.2005. This leading German newspaper will run a series portraying women publishers in the Summer of 2005.

⁸ The 8th „KulturBarometer“ of ZfKf, a representative survey of cultural practices and interests in Germany, carried out in Spring, 2005, shows an interest for literature and book reading among 21% of the male population of 14 years and older, as compared to 37% among women.

- On the one hand, the book market enjoys *indirect public support* through the general application of the lower VAT rate and is also protected from price competition via a *fixed book price system* in three of the four countries highlighted in this study (Finland as the exception). *Copyright and contract law* is worth mentioning, in this context. In addition, some countries with smaller markets give *direct subsidies* to independent publishing houses, e.g., in Austria.
- On the other hand, the book market is characterised by concentration processes from which a few trans-national *multimedia consortia* emerged, which integrate e.g. film, music and television companies as well as production and distribution facilities in the whole audiovisual sector (which, however, did not hinder the development of small and “niche” publishing houses).

Therefore, book publishing, on the whole, should not be seen any more as isolated from other parts of the culture industries, including their links and interdependencies with publicly funded arts, education and media organisations.

2.1 Recent Market Trends in the EU Book-Market

To work with reliable (and comparable) data on the book publishing industry is not such an easy task as one might suppose. Cultural and industry statistics in the European countries and in the EU as a whole, show great differences in their overall development as well as in their scope and definitions.⁹ A standard-setting body, like the European Audiovisual Observatory does not exist in this domain and which has been detrimental to the work of the Culture-Biz teams in the participating countries and to the task of providing comparative information. “Publishing-Watch”, an independent group of specialists located in Finland, Germany and the UK which oversees the publishing market in Europe, points to the large differences between Eurostat data on the economic dimensions of book publishing and the results of a very recent industry survey undertaken for the Federation of European Publishers (FEP):

“FEP’s study, which draws its information from the industry via national trade associations and is based on a well-founded process and methodology, suggests that the annual turnover of book publishers in Europe is approximately 21 billion Euro. This must be compared with the data from Eurostat, also based on a well-established process and methodology, which suggests that the annual turnover of book publishers in Europe is nearer to 30 billion Euro.”¹⁰

⁹ Hofecker, Franz-Otto/Tschmuck, Peter: *Kulturpolitik, Kulturforschung und Kulturstatistik*. Vienna 2003

¹⁰ <http://www.publishing-watch.org/documents/books.aspx>. The figures in the text refer only to EU countries and not to “Europe” as a whole.

If we use the latter figures, the publishing industry in the four countries participating in our study would, with a *turnover* of approx. 9.3 billion Euro (latest figures), would represent ca. 30% of that market, which has been relatively stable in the past years. If the annual production of *book titles* is taken into account, which shows a slight trend downwards, the output of the four countries (ca. 103 000 titles) would represent less than 1/4 of the EU market (producing ca. 466 000 titles/year). In the end we relied on data published in the latest FEP survey (mainly from 2002¹¹) which point to some other trends:

- German *language* books have the largest market (ca. 24% of the turnover), followed by books published in English (23%), Spanish and French (both approx. 15%);
- Children’s books are the *main growth area* in book publishing (up 9.5% from early 2000), which the authors of the present study would probably attribute to the “Harry Potter” phenomenon, as can be read in the Austrian, Portuguese and Finnish reports;¹²
- *Domestic sales* stabilized (figures up 25%), which could signalize a blow to the far reaching global ambitions of some of the big players;
- Full-time *employment* amounted to ca.129 000, a slight downward trend (these figures are, again, not comparable with Eurostat data, which have been published in the Introduction to this book).

The FEP data also shows us that the overall share of *first editions* (as compared to reprints etc.) has been increasing (from 69 to 73%). This rate is close to the figures in Germany and Portugal, while figures for Finland (over 90%) and Austria (only about 10%!) are extreme cases. High rates in first edition prints can be seen as supporting the claim that “the life-cycle of mainstream books is continuously decreasing”, since many book-biz managers are now mainly focused on quick returns on investment and are downsizing their operations. On the other hand, this practice has fuelled the rise of discount markets and stores which sell “scrap books” and assists sales managers wanting to circumvent fixed book price regulations.

¹¹ Due to its recent publication, the full report could not be evaluated, the only source for it being a press release disclosed by publishing-watch.org.

¹² Of course, this situation is not only relevant in the field of children’s books as discussions among branch professionals about the “midlist problem” show: More and more, mainstream fiction publishers make their profits just with a few international best-sellers, while print runs for average titles go down and such books may be taken out of the regular market after just two or three years. Similar to the “blockbuster”-problem discussed in the film part of this study, these bestsellers block large parts of the marketing budgets and jam distribution channels and thus prevent other works from getting into book stores.

2.2 Concentration and Diversification

The European book market has undergone major changes over the past decades. It first experienced a series of *horizontal mergers and take-overs of publishing companies* e.g. in the Nordic countries and in the United Kingdom. These enlarged publishing companies became *vertically concentrated* as they began to acquire book-shops, distribution companies, printing facilities etc. Since the 1980s, a third step/shift was taken towards *multimedia (or "diagonal") concentration*, as many important publishing houses became integrated into larger, often trans-national multimedia consortia, some of which operate globally and include film, music and television companies as well as production and distribution facilities throughout the whole audio-visual sector.

Among the main conglomerates in Europe that have a high stake in book publishing and are also conducting important trans-national activities are¹³:

- Bertelsmann/Random House (main seat in Germany/United States = D/USA);
- Bonnier AB (S);
- Grupo Planeta (ES);
- Lagardère/Hachette (F);
- Mondadori (I);
- Pearson/Penguin(UK);
- Reed Elsevier (UK/NL).

The executive boards of five of these groups have been examined by the ERICarts team to determine the share of women among their decision-making circles (see section 4).

Assessing the influence of these conglomerates in the European and world-wide media landscape is an issue of constant debate¹⁴ and goes beyond the scope of this study. What we can retain from these discussions are a few points:

¹³ Some of these groups have formed partnerships in order to enter into new / regional markets e.g. in 2001, Random House and Grupa Mondadori formed a joint venture to enter into the Spanish speaking market.

¹⁴ See, for example, Robert W. McChesney: "Global Media, Neoliberalism and Imperialism" in: *Monthly Review*, March 2001, the Internet services of "Oligopolywatch" (<http://www.oligopolywatch.com/stories/2004/01/31/bookPublishing.html>) or Andrew Bibby: *Global Concentration in the Media*. Nyon: Union Network International, 2004. On the other side of the argument see a memorandum of the European Publishers Council, a group of 29 Chairmen and Chief Executives of European media corporations, sent to the European Parliament on March 5, 2005. This group advocates for self control mechanisms

- Through their vast financial resources, conglomerates may help to open up international market opportunities and to make the necessary R&D investments in areas such as the development of new technologies. These activities are beneficial for smaller firms and may even facilitate co-operation in specific areas of common interest e.g. with specialized scientific publishers. As well, the management and marketing experience of larger companies is said to be stimulating a realistic, customer-oriented view on the “biz”-side of the book trade;
- Since avoiding risks and maximising profit or “shareholder-value” is considered as the main rationale of multinational media corporations, “cultural profiles”, national literary heritages and media diversity are expected to be of lesser concern to them. For the same reason, negative effects on (national) labour markets and working conditions cannot be overlooked in areas witnessing a mushrooming of conglomerates. According to critics, they are also striving to maintain good relations with the dominating political powers, which could endanger freedom of opinion. With their marketing power and “blockbuster” strategies, they can make content appear less attractive to booksellers and customers and therefore gain control of markets and minds beyond their own company structures.

While in countries with large markets mergers and other concentration processes with sometimes trans-national dimensions are to be expected, smaller countries seem to be more vulnerable as a single company or an oligopoly structure takes control of domestic markets. For example, in Norway, together with horizontal integration,

“there has also been substantial vertical integration, since the Gyldendal and Aschehoug publishing houses have been investing strongly in the book retailing sector, particularly in large towns. They control almost 40 per cent of the book retail trade. This has caused unrest in the book sector in recent years.”¹⁵

and national instead of European regulations to secure media content diversity (<http://www.epceurope.org/issues/MemorandumPluralismMediaConcentration.shtml>). Such positions need to be balanced with more in-depth, empirical approaches to the issue, such as the report of a group of experts for the Council of Europe: *Transnational Media Concentrations in Europe*. AP-MD (2004) 7; Strasbourg: 2004, or Alfonso Sanchez-Tabernero and Miguel Carvajal. *Media Concentration in the European Market. New Trends and Challenges. Media Markets Monograph*. Pamplona: Servicio de Publicaciones de la Universidad de Navarra, 2002. The issue of multimedia concentration has also influenced part of the debate about a *Convention on the Protection of the Diversity of Cultural Contents and Artistic Expressions* of UNESCO (still ongoing at the time when this book was published).

¹⁵ Norwegian Ministry of Culture and Church Affairs: *Cultural Policy up to 2014*, Report No. 48 to the Storting. Oslo: 2003.

In the countries surveyed for Culture-Biz, as in most other parts of Europe except in the former socialist countries, the vast majority of professional publishing houses were originally family-owned companies, where different generations of the same family contributed to the “profile” of their company and which often figured under the brand-name of their founder. In *Portugal*, this family structure continues to be widely maintained, since the country has not been considered particularly attractive for take-overs from leading international book and media companies. The main reason for this lack of interest, as seen by the Portuguese team, is because in a very small domestic and export market (about 3.5% of the turnover achieved in Germany), the perspectives for growth are limited, especially considering the low levels of reading habits in the country. In the other three Culture-Biz countries, the situation is quite different:

- In *Finland*, domestic cross media concentration has drastically transformed the book market since the mid-1990s. This development has culminated in the formation of a giant media corporation in 1998-1999, when the leading newspaper corporation (Sanoma Oy) and the leading book/journal publishing house (WSOY) merged and, after further expansion came to control more than 40% of the country’s book market. On the other hand, such concentration processes seem to have paved the way for many new small publishing houses, which serve either special niche markets or operate “with a mission” that can counteract mainstream marketing strategies. As stated in Culture-Biz Finland, “women have had a significant role in this business re-generation.”
- A similar development has taken place in *Austria*, thanks also to some public intervention. While the market for scientific and general consumer books is now “dominated by foreign (mostly German) media conglomerates”, a sizable number of smaller publishing houses managed to survive and new, “issue-driven” initiatives are emerging. The latter seem particularly attractive to women, despite (or because) there is “a lot of idealism involved”, as is demonstrated in the Austrian report with the example of the feminist publishing house, “Milena Verlag”.
- The book trade in *Germany*, with 80 971 titles including 61 538 genuinely new publications, continues to be the most important branch of all culture industries in the country and is among, next to the USA and the UK (which have, of course, larger export opportunities), the leading book markets world-wide. In Germany, horizontal and vertical concentration processes began already in the 1960s and 1970s and continue on. While in 1994, 7% of the book publishers (which, however, amounted to 234 different companies) made up 78% of the total turnover, in 2001 only 4.4% achieved a share

of over 82%.¹⁶ Despite this fact and the emergence of some global players like Bertelsmann/Random House, we can still speak of a relatively diverse sector, which is characterized, especially in the fields of literature and children's books, by the participation of independent, medium-sized companies. It has been estimated that concentration in the book market is lower than in many other economic fields which can also be highlighted by the fact that 95% of the – highly feminised – book shops are still family-owned.

Table 1 Book Markets in Austria, Finland, Germany and Portugal: Key Data

	Austria	Finland	Germany	Portugal
Professional Publishing Houses	ca. 180 (out of 1 000)	ca. 350 (two dominate)	ca. 1 900 (out of 12 000)	ca. 300
Titles Published	7 809 (2002)	9 924 (2002)	80 971 (2003)	10 708 (1999)
<i>of which:</i> First Editions (%)	9.2%	91%	76%	68%
Turnover	293 Million EUR (2001)	479 Million EUR (2003)	8.14 Billion EUR (2003)	345 million EUR (2002)
Book-Shops	ca. 1 200	ca. 300	ca. 4 500	ca. 300

Source: Culture-Biz country profiles; European Booksellers Federation; Archiv für Kulturpolitik

2.3 Publishing in the Context of the “Digital Revolution”

The scope of action for employees, decision makers and freelance professionals working in/for publishing houses, distribution companies and book stores is increasingly under the influence of the “digital revolution”. New forms of production and distribution such as “print-on-demand”, increasing amount of book trade being done through the Internet (with the most prominent global player “Amazon” at the fore) and the possibility to download texts/articles from the Internet are among the developments which have changed and influenced the working methods and styles, the general concepts and management strategies in the publishing field.

¹⁶ Lammert, Norbert: “Szenario 2010 – Verlage, Buchhandlungen und Bibliotheken in der Informationsgesellschaft”. In: Die Deutsche Bibliothek (Ed.): *Wissenschaftspublikation im digitalen Zeitalter : Verlage, Bibliotheken, Buchhandlungen und Bibliotheken in der Informationsgesellschaft*. Frankfurt: 2002 (via the Internet: <http://www.ddb.de/produkte/pdf/wisspubl13.pdf>), comes to the following conclusion: “In Germany today (2000), 25 groups of companies account for three quarters of the turnover, ten years ago, 20 companies controlled one quarter of the market.”

As pointed out in the “European e-Business Report 2002/03”¹⁷, media and printing industries, including book publishing, are experiencing “far-reaching structural changes, which are not only altering organisational structures, but also the products and services produced by this sector.” Among the implications of digitisation and new information and communication technologies (ICT) for individual enterprises are:

- Massive *changes in the workflow and value chain within companies*, where some traditional steps become obsolete or are conducted by other (also external) actors, which puts great pressure on the administration of companies and increases the need for change;
- Similar *changes in the relationship with external business partners and customers*, which increases the need to network with other companies and to employ sub-contractors; the question of how to secure copyright protection has become an urgent issue in this regard;
- The advent of *new products and services*, such as texts offered for download on a pay-for-use basis on the Internet or the recent boom in “audio-books”, whereby prominent personalities from the arts and social life read full texts or excerpts from books, some of which are directed at car drivers, others at children.

While these and similar challenges may have severe implications for those companies that stick to traditional business models or have no means to invest in new distribution channels, they can be seen as opportunities for those that engage in diversification or specialisation processes. Of course, the catchword *cross-media* describes processes or intentions which are not really new to the world of publishing, e.g. co-operation with the film industry:

“By the late 1940s, book publishers had already begun to defray a sizeable percentage of their costs by selling subsidiary rights, and editorial decisions were already influenced by that dependency. Long observes that by 1949, the movie industry had already becoming actively involved in the process of acquiring literary properties that could be realised as books and movies in heavily orchestrated campaigns.”¹⁸

Contemporary cross-media services, however, require more than a “nose” for special opportunities; usually, they rely on strong ICT skills as well as advanced

¹⁷ *The European e-Business Report 2002/03, A Portrait of E-Business in 15 Sectors of the EU Economy*, 1st Synthesis Report of the e-Business W@tch, March 2003.

¹⁸ Nicholas Jones: „The Bottom Line and the Big Book. Is Publishing Becoming an Industry of Bean Counters?” in: Internet Journal *The Culture of Publishing*, 2nd Edition. Oxford Brookes University: 1997.

marketing capabilities and may thus be out of reach for many small and medium sized enterprises (SME). As the failed strategy to introduce so-called “e-books” in the late 1990s and, generally, the crash of the dot-com hype at the stock market a few years later have shown, it is mainly the large companies or those with a sound financial backing that have the financial strength to shoulder large investments and risks. Even “Amazon” needed 8 years before it could make its first profit and current trends show¹⁹ that the Internet giant, facing stiff competition in a book market which has adjusted its marketing repertoire to the new technical possibilities, cannot sustain its growth rates, despite its diversification strategies.

On the other hand, examples given in the Culture-Biz national reports show that SME’s can definitely profit from the digital revolution, since new soft- and hardware allows the typesetting and design of a new book to be accomplished on a single computer or, as the Finnish report notes, enables the fast transfer of “technical tasks to the Baltic cheap-labour countries”. It is more than just a speculation if we say that it has never been easier and less costly – also for women publishers with an entrepreneurial mind – to start their own business than now, in the digital age.

2.4 Publishing in the Context of Cultural Policy and Support Frameworks

In many countries, the problem of sustaining a meaningful and diverse body of literature, especially as regards the position of high quality fiction and poetry in the national languages versus translated international bestsellers, is left mainly to the abilities of authors and private publishers themselves. As the Finnish study puts it, the latter

“are expected by and large to solve the problem by making publishing profitable enough so that high quality prose, poetry – belles lettres – can be subsidised by the companies themselves from the profits of other commercially more successful products. These expectations have shaped and are still shaping the institutional structure and orientations” of the owners of publishing houses as well as those of managers and other professionals working for them.”

Whether they are able to reach that goal depends, however, to a high degree on the conditions they find in their national markets and also on the existence of appropriate *cultural policy frameworks or incentives* which assist them. While legal frameworks play a decisive role in all countries highlighted in our study, more direct support policies and incentives are becoming less relevant in Finland and have only partly been developed Germany; however, according to the national reports, they are of great importance in Austria and Portugal.

¹⁹ <http://www.presetext.com>, 16.07.2005

Earlier comparative research²⁰ found as many as 35 distinct types of support for literature via funding measures and legal or policy frameworks in 25 countries, which could be grouped into four major areas:

- Direct funding measures for individual creators;
- Market support measures;
- Exploring (new) audiences and broadening the reception of literature;
- Legal and social frameworks.

As regards the aims and intentions of governments, public agencies and partly also private foundations or sponsors in this field, later studies²¹ identified three main lines of support:

- a “creativity line”;
- a “professional marketplace line”; and
- an “interventionist line”.

Of course, in the face of globalisation and widespread deregulation of national markets, not all of these measures have really worked and, as well, not all of them are equally important for all types of publishers. However, the staff and executives especially of small and medium-sized publishing houses with a focus on “high quality” fiction and children’s books will need, in most countries, a lot of experience and also the necessary contacts with relevant support and regulatory bodies to master the opportunities and problems connected with such programmes and conditions.

As regards *legal frameworks and interventions*, the following are of particular interest for publisher’s associations or other professional bodies, but usually concern also the individual companies and their management:

1. A *lower VAT rate* for books is charged by the tax authorities in most European countries (an exception is Denmark). In some countries, publishers and customers even enjoy a zero-rate VAT on books such as in Ireland, Norway, Poland or the UK. Since this rate applies to all types books, regardless of their “cultural value”, it could be seen as an incentive for publishers and book shops to give quality products or those not necessarily attractive for the majority of customers a better place in their publishing programmes and marketing strategies.

²⁰ Wiesand, Andreas Joh./Zentrum für Kulturforschung: *Literaturförderung im internationalen Vergleich*. Cologne: 1980.

²¹ Cliche, Danielle; Mitchell, Ritva and Wiesand, Andreas Joh. in co-operation with Ilkka Heiskanen and Luca dal Pozzolo: *Creative Europe: On the Governance and Management of Artistic Creativity in Europe*. Bonn: 2002.

2. *Copyright/droit d'auteur* legislation as well as provisions regulating *contracts* have always figured high on the agenda of publishers associations²² and their members. This does not come as a surprise, since publishers are confronted with new (re)production and digital distribution techniques which can circumvent traditional value chains and also endanger their usually strong position vis-à-vis the authors. As well, in many countries they can claim up to 50% of the royalties distributed by collecting or “author’s societies”. In some cases, also *special publishers’ laws* exist, which – like the German “Verlagsgesetz” – regulate the basic relationship between the author and editor or – like in the Ukraine – make provisions for language minorities.
3. *Fixed-book price systems* are in force in many European countries. The exemptions from regular national and EU competition rules are intended to support diversity both in the supply of literature and in points of sale (small book shops are able to compete via the single price system with the larger chains and their marketing capabilities). Frequently these systems come under fire, especially from the EU Commission, while others such as the Council of the EU, based also on a “cultural” understanding of the role of books and their trade, took a more cautious approach.²³ Of course, trans-national distribution and new marketing techniques (e.g. via the Internet) are less successfully implemented in countries where a fixed price system is in force.
4. Among *other special regulations* (of differing relevance), we can mention e.g. social security measures for self-employed authors and translators; customs rules; laws and regulations concerning the relations between publishing houses and (national) libraries, e.g., with regard to book deposits; reduced postal rates for books and magazines; and sometimes even internal trade rules developed and enforced by professional bodies.

There are also important *direct or indirect support mechanisms*, which help to maintain school book markets and a more or less extensive network of public libraries, which purchase books from a wide range of fields. In addition, we can highlight the importance of public policy measures with a few examples, many of which have been listed in the Internet information system of the Council of Europe and the ERICarts Institute, *Compendium of Cultural Policies and Trends in Europe*²⁴.

- In *Austria*, independent publishing houses with a programme of cultural relevance can claim direct subsidies (up to an amount of 163 800 Euro per

²² Cf. <http://www.fep-fee.be/eframprinc.htm> (Federation of European Publishers).

²³ Council Resolution of 12 February 2001 on the application of national fixed book-price systems (2001/C 73/03).

²⁴ Cf. <http://www.culturalpolicies.net>

year) from the Federal Government; the subsidies are allocated by a jury composed of professionals from the literary field.²⁵

- In *Bulgaria*, the National Book Centre of the Ministry of Culture has supported, through its “Book Aid Programme” (created in 1991), publishers of certain types of literature on a competitive basis such as: contemporary Bulgarian literature and literary heritage; Bulgarian humanist studies; reference works; and translated literature.
- In *Estonia*, state ownership of some companies relevant for the cultural field has been maintained, such as “Periododika”, the publishing house for cultural periodicals.
- In *France*, the Centre National de Livre runs several lines of support to publishers²⁶, some of which concern poetic and dramatic works for adults and youth, “grands projets” of works published over a span of several years, subventions to copyright royalties for collective or multimedia publications, and basic support measures for the economic development of independent, small and medium-sized publishing houses of “national significance”.
- In *Greece*, the National Book Centre has started a broad ranging programme of subsidised translations and other activities to promote Greek literature.
- In *Ireland*, the “author’s royalty scheme” provides grants and/or loans to publishers to enable them to pay royalties to writers in advance of publication and for translation from Irish into English.”²⁷
- Special funds in the *Netherlands* and in the *Flemish part of Belgium* (and, as a matter of fact, also in other countries worldwide), offer substantial support for translations of Dutch literature as well as for literary events and promotional activities abroad. While these subsidies usually go to foreign applicants, they benefit, of course, also the national authors, translators and the rights portfolios of publishers.
- In *Norway*, there are state purchasing schemes for national literary works, which are considered to be “successful literature and language policy instruments which should be maintained.”²⁸
- In *Slovenia*, the Ministry of Culture devotes ca. 3% of its budget (2002) to aid the publishing of books in the fields of literature and humanist studies,

²⁵ More: <http://www.bundeskanzleramt.at>

²⁶ <http://www.centrenationaldulivre.fr/aides/aide.htm>

²⁷ Coffey, Stella: “Ireland – Policy Profile”, posted on the website <http://www.creativeurope.info>

²⁸ Norwegian Ministry of Culture and Church Affairs, op. cit.

non-commercial journals in the areas of art, culture and magazines for the young, and to a lesser extent also to projects in the areas of reading culture, literary festivals and international activities. The government supports around 250 book titles annually, or around 15% of all first titles published, and around 55 non-commercial journals.

- As many authors are “cross-subsidising” their literary production through working for radio or TV stations (and other mass media), they can also profit from regulations and quota systems aimed at increasing the programming of domestic productions in national languages, e.g. in *France* or *Poland*.²⁹

What should be noted is the absence of *gender-related provisions* in this field of action; even in funding programmes for authors or among literary awards. However, a revival of the debate on equal opportunities can be registered in the context of the implementation of EU anti-discrimination principles for the private sector economy into national laws (see Culture-Biz Germany) and some countries, e.g. Greece, have also made efforts to encourage the entrepreneurial activities of women. The latter issues are also dealt with in *networks* of women working in publishing.³⁰

3. Job Profiles, Training and Opportunities for Women in Book Publishing

This section aims to provide a general picture of the responsibilities, training possibilities and career paths for those working in book publishing companies. Many of the profiles of authors, translators and critics,³¹ bookshop employees have undergone decisive changes during the last decades and continue to do so, following the market and technical developments mentioned earlier in section 2.³²

²⁹ An overview of such regulatory measures in different European countries has been provided in the 3rd Culture Industries Report: *Kulturwirtschaft in Nordrhein-Westfalen - Kultureller Arbeitsmarkt und Verflechtungen*. Ministry of Economic Affairs of NRW. Duesseldorf: 1998.

³⁰ *Women in Publishing* is an international organisation that aims to promote the status of women in all areas of publishing by encouraging communication among women working in the industry and supporting their professional development. Some of their national chapters, e.g. in Austria and in the UK, are co-ordinated from inside the country’s publishers associations (<http://www.wipub.org.uk/international.html>)

³¹ These and other creative professions have been addressed with in an earlier comparative study co-ordinated by the ERICarts-Institute in the framework of the 4th Medium-Term Community Action Programme on Equal Opportunities for Women and Men – see Cliche, D., Mitchell, R. and Wiesand, A. J. (Eds.): *Pyramid or Pillars – Unveiling the Status of Women in Arts and Media Professions in Europe*. Bonn: 2000.

³² Job opportunities in book publishing, partly based on UK occupational standards, are

While the participation of women working as professionals in book publishing does not reach the levels found in other book-related sectors, such as libraries (70 to 90% share of women)³³ or retail book shops (around 80%), it is, nevertheless, higher than in the labour market, in general, and in the cultural labour market, in particular – see also Table 1 in the Introduction to this book. Women make up nearly 50% of all employees in the whole publishing sector of the European Union³⁴, with Germany and Austria being close to that mark and only Portugal showing significantly lower figures (around one third of all employees)³⁵. From the countries surveyed in this study, Finland could provide more specific data and came up with the highest portion of women employed in book publishing (63%).

3.1 Publishers

Generally speaking, the function of a publisher is to organise and facilitate the exchange of information between an author and a reader. Therefore, a publishing house is not an industrial manufacturer in the usual sense. In traditional publishing houses, the publisher – who is usually a part owner – oversees a process where manuscripts from authors (or editing teams) are transformed into a book or other product that can be sold and later delivered to distributors, to book stores or directly to the final customer³⁶. The publisher also bears the financial responsibility for the product.

As mentioned before, the traditional role of a publisher is changing. In former times, a publisher had the final say in many different fields, from editorial decisions to sales and investment strategies, while also maintaining direct contacts with important authors and playing a key role in public relations. While this profile is still valid in smaller enterprises, it is now disappearing in the larger ones and, as registered in the Portuguese study, is being

“replaced by professional business structures, with complex organisational structures, overseen by professional managers. The traditional owner-editor that exercises numerous functions is being substituted by company managers especially in terms of the company’s administrative functions.”

described in greater detail on the website
<http://www.train4publishing.co.uk/content/careers/careersinpub.pdf>

³³ *Pyramid or Pillars*, op cit.

³⁴ Data collected from EUROSTAT for his study (based on NACE 22.1)

³⁵ This, however may be due to inconsistencies in the definitions used in the data collection, since other sources show results similar to those in Austria and Germany (see Portuguese Report).

³⁶ Uhlig, Christian: „Buchhandel“. In: *Handbuch Lesen*, Baltmannsweiler: 2001.

Chief executives and managing directors in the medium-sized or larger publishing houses are often former editors or sales and marketing directors. However, the executives and board members at the highest levels of big companies are increasingly coming from outside the publishing world, having more experience in general management and investment strategies. This may contribute to lower shares of women among publishers which can be estimated at around or less than half of the general labour market figures mentioned before (e.g. Germany ca. 18%).³⁷

3.2 Editing

The main tasks of editors are to search the market for manuscripts or ideas and maintain contacts with authors and agents. In addition, the editor is also a “gatekeeper” who selects manuscripts, many of which come unsolicited; he or she then determines their value for eventual publication. This decision-making process usually takes place in the context of a pre-defined framework of objectives and interests conceived by the upper management. While most editors have academic experience, much will still have to be learned on the job, particularly the financial implications of decision-making. The career-pathway from copy or desk editor to commissioning editor and chief editor up to other senior positions within the company, is narrowing since companies are ‘economising’ or “downsizing” their staff and are increasingly outsourcing services which were once realized in-house. On the other hand, in smaller companies, such hierarchies are not common and more responsibility is given to only a handful of editors. As can be seen in the Culture-Biz country studies, women are relatively well represented among editors, if not in a majority, as well as in top editing positions (e.g. 44% of chief or managing editors in Austria are women).

Two major trends are influencing the professional field of book editing. On the one hand, it is expected that editors not only have a “good nose for new discoveries”, concentrating on their contacts with authors, but also have the ability to “interpret calculations, observe sales cycles of books, understand cost-benefit-ratios, define and locate target groups.”³⁸ This shift away from authors and the production of books towards marketing and sales strategies is not really a new one, in fact, the change of the profile “from editor to product manager”³⁹ has already been highlighted over thirty years ago.

³⁷ EUROSTAT figures for self-employed with employees in the EU show 24% women (NACE 22.1)

³⁸ Göbel, Wolfram: „Produktmanager, Ghostwriter oder Macher. Die Funktionsveränderungen im Verlagslektorat“. In: Schneider, Ute (ed.): *Das Lektorat – eine Bestandsaufnahme*. Wiesbaden: 1996.

³⁹ Quote from Fohrbeck, Karla and Wiesand, Andreas: *Der Autorenreport*. Reinbek: 1972.

The other transformation took place mainly during the last 10-15 years where, at least in the smaller and medium sized publishing houses, in-house editing was, to a large extent, replaced by freelance editors. This latter trend created new job opportunities, in particular, for women who may search for possibilities to exercise their professional capabilities from a home-based environment, however, at the expense of social security, steady income and other benefits connected with regular jobs. Some freelance editors have tried to compensate these risks by offering publishing houses, “a complete project management service encompassing the entire electronic pre-press operation, i.e. from authors disk to digital file ready for typesetting and printing.”⁴⁰ This in turn, extends the contract of services and also, of course, the level of remuneration. Others engage more as literary agents, which may sever the close ties with “their” particular publishing houses (see below).

3.3 Production Staff

With the exception of very small publishing houses where production is mostly outsourced, medium-sized and larger companies usually have production departments which include persons responsible for design and picture research. Large publishing groups sometimes maintain their own printing facilities which are also used by “external” companies.

The many different jobs in book production have, in the course of the digital revolution, become increasingly complex, especially as technologies are continuously evolving. This puts tremendous pressure on production workers to stay abreast of the latest technological advances and on the ever-evolving design programmes. Without practical experience, built up over many years in publishing, printing and similar domains, a career towards upper management in one of the larger or medium-sized publishing companies is unthinkable. The Culture-Biz country studies show that the number of women in senior posts is relatively low.

3.4 Sales and Distribution Staff

While some jobs within publishing houses face major transformations as well as redundancies, those working in the sales, marketing and distribution department have nothing to fear. Job opportunities exist especially for those applicants with training and experience in marketing and customer relations; of which there are increasing numbers of women.

Sales strategies in the publishing sector, rely heavily on the activities of general or trade representatives, many of which have contracts with several different companies. Their knowledge and experience, gained from close contacts with potential

⁴⁰ Clark, Giles. *Inside Book Publishing*. 3rd edition. London and New York: 2004.

points of sale (i.e. bookshops and department stores, academic institutions, or wholesalers) is valued highly by sales managers and may even directly influence the internal strategies of a publishing house e.g. at regular meetings held between representatives and the management. “Publishers ideally want to maintain continuity of contact and trust with their customers”.⁴¹ The role of the trade rep is key for keeping and building upon such crucial relationships.

However, the economic and technical changes already mentioned also influence the status of trade representatives. Negative impacts come from increased direct sales and marketing strategies as well as from growing immaterial trade with rights and from the emergence of external professional delivery services, which also maintain direct contacts with points of sale. While we could not establish particular policy trends, one can notice that a majority of trade reps continue to be men⁴². The inevitable “nomadic” lifestyle one must lead in this professional domain may be one factor to explain a certain reluctance among women to enter into competition for trade rep positions.

3.5 Public Relations

Public relations and media staff have gained increasing importance over the last decades. In many cases, they are either part of a sales and marketing portfolio or directly linked with the top executive management of a company; in larger firms, top executives are now often represented in the board of directors.

Close connection with the marketing staff is crucial for the work of public relations officers as well as possessing a thorough knowledge of how to filter a book through different channels of the media. Next to media coverage, the organisation and monitoring of special events surrounding a books’ introduction into the market is of paramount importance. Feed-back given to authors, editors, and to other stakeholders within the company may often result in changes to publication strategies.

Work experience inside the media or in specialised public relations and advertising companies, is considered beneficial for job applications in this domain. As can be seen in the Culture-Biz country studies and even in large corporations such as Bertelsmann/Random House, there is an increasing number of women who occupy such positions.⁴³

⁴¹ Clark, op cit.

⁴² cf. the German report and continuous advertisements in the trade journal “Börsenblatt” of the German Publishers Association. This situation may, however, change in the future, since women account for 71% of sales agents who underwent apprenticeship training, during the last 10 years.

⁴³ cf. Fröhlich, Romy, Peters, Sonja B. and Simmelbauer, Eva-Maria: *Public Relations. Daten und Fakten der geschlechtsspezifischen Berufsfeldforschung*. München: Oldenbourg, 2005

3.6 Other Publishing Staff

Larger companies usually have special departments for *business administration*, *accounts* (financial planning), and/or *controlling*. In addition, *rights administration* may be of importance depending on the scope and size of the company. These and similar jobs typically require special training, usually on a university-level of education (though some older heads of such departments may have learned their job in house). The representation of women in these departments varies in the countries observed in this study which, of course, depends also on the attractiveness of these fields to female students. As business and law studies become more and more filled with female students, we may find, in the future, more women acquiring higher positions in these fields.

The number and importance of *independent literary agents* has also increased. On behalf of publishing houses and/or authors, they mediate licenses and contracts with authors and other rights-holders, both in domestic and foreign markets. As the position of literary agents advances in the market, the role of, for example, in house editors which were “the author’s primary contact” will change. However, what could really disappear are the traditional, often long-standing personal relationships of authors with a particular publisher and its top executives, which are traded against a strategy of “shopping for the best deal”.⁴⁴

Literary agents need a wider range of experiences and qualifications, including authority in literary judgments, knowledge of copyright and contract law, language skills and also a talent for personal communication; in this domain, the portion of women is particularly high (e.g. two thirds of the 46 German literary agents registered at the Frankfurt Book Fair 2003 were women).

3.7 Training, Recruiting Practices and Empowerment of Women

In the countries with larger book markets, e.g. France⁴⁵, Germany, Italy, Spain and the UK, institutions offering training programmes for book publishing are commonly found, often in connection with professional organisations or on a university level. Their certificates constitute regular points of entry into a professional job or, via post-graduate courses, necessary for the advancement of a career. As an example we could mention the “Publishing Training Centre at Book House” in London, which provides training for publishers in the UK and overseas and offers

⁴⁴ Tyldesley, David: “The Trouble With Take-Overs: A Consideration of the Impact of Corporate Culture upon the Culture of Publishing.” Internet journal *The Culture of Publishing*, 2nd Edition. Oxford Brookes University: 1997.

⁴⁵ Association nationale des éditeurs de livres (ANEL): *Perfectionnement Professionnel*. Programme des activités, Printemps-été 2005 (<http://www.anel.qc.ca/PDF/Formation2005.pdf>).

more than 60 open courses, covering a complete range of publishing and management skills, including electronic publishing.⁴⁶ The Centre also runs in-house training courses, distance learning programmes and services for freelance professionals. In addition, there are 14 universities or colleges in the UK which offer specialized study programmes in this field. In contrast to this, the training infrastructures in smaller countries are often less developed or formalized. However, first steps towards European co-operation in this field have been taken.⁴⁷

In the Culture-Biz country studies, the landscape for education and training is mixed:

- In *Austria*, professional training opportunities in the publishing sector are less developed, especially on the academic level. However, the 'Fachkolleg buch|medien' of the branch organisation of the Austrian book trade organises – sometimes in co-operation with other partners such as the Donau-Universität Krems – workshops and courses on relevant topics. Participation of women is high (66% in 2004). Publishing as an apprenticeship was officially recognized in 2004 and its training programme puts more emphasis on the business side of the trade.
- The *Finnish* report highlights the “rather limited role” of formal education in the recruitment of professionals for the book publishing sector. Complemented by some courses offered by the Finnish Association of Publishing Professionals, in-house training is most important and trainees often come from university study programmes of Finnish language and literature; the majority of students in these programmes are women. The result has been a large number of women being recruited to occupy middle and lower level jobs in publishing companies. This is viewed ambiguously by one of the interviewees since, on the one hand, feminisation of such positions has led to “a professional and impartial corps of readers and editors which the authors trust”, on the other hand it cannot be considered “fair from the point of view of gender equality” as men still occupy the majority of upper management positions.
- In *Germany*, professional training is highly developed and particularly attractive to women. Over the last decade, 4 out of 5 trainees/apprentices were women. On the university level, a variety of study courses related to publishing are offered. For example, a Master's degree in book science, including the economics of the book sector, is offered by the universities of

⁴⁶ cf. <http://www.train4publishing.co.uk/>

⁴⁷ The Association of Bookseller and Publisher Training Organisations in Europe (ABPTOE) offers a platform of experts on current and future training issues and aims at organising cooperative programs between several training organisations.

Erlangen, Leipzig and Mainz; the University of Munich runs a Bachelor's programme and post-graduate courses in book publishing. The percentage of women in such programmes is high (from 60 to over 90%) and is still growing, with the more technical oriented courses occupied mainly by men (around 30 to 40% female students). As concerns further training and education opportunities for trained book publishers, commercial clerks in publishing houses, experts and top managers or for people who access the profession through the side door or who return to the sector after a career break, the "Akademie des Deutschen Buchhandels" in Munich offers a wide range of courses. In 2004, women made up 68% of the students participating in special courses related to publishing and book selling. The lowest share of women (44%) was found in managerial courses.

- In *Portugal*, no specific academic qualification or formal training exists that may constitute a pre-condition for initial recruitment. Practical work experience as well as good contacts with authors and the media are still considered keys for building a career in the publishing sector. However, gradually, a university degree (mostly in languages which, of course, favours women) is seen as a future requirement, together "with a set of personal attitudes and tastes related to books and reading". Since 1994, a post-graduate "specialisation course for publishing staff" exists in the Literature Department of the University of Lisbon and its mostly younger students are predominantly women.

While there is an increasing amount of training or formal education courses on book publishing and a key interest on the part of publishers to recruit students of business management, building one's way up a career ladder in the sector is still reliant upon in-house experience. In this context, "mentoring" becomes a very important part of career building for trainees or newcomers (as has been highlighted in former ERICarts studies⁴⁸). While there are few women-targetted mentoring programmes in house, they are networks which help to fill this void. For example, the German Branch of the *Women in Publishing Network* ("Netzwerk Bücher-Frauen") provides a mentoring programme specifically for women. They connect an experienced female mentor with a younger qualified professional ("mentee") over a period of one year, advising her and supporting her development. In an Interview for this book, Hanne Knickmann, press officer of the Network, pictures the mentor as

⁴⁸ *Culture Gates*, op. cit. For a general empirical study of the role of mentors for both men and women (including also the importance of different socio-political contexts) see Palgi, Michal and Moore, Gwen: "Social Capital: Mentors and Contacts". In: *Current Sociology*, May 2004, Vol 52(3).

"a colleague who is at least two steps ahead of the mentee on the career ladder, most of them women with a very busy schedule who participate in the programme on a voluntary basis. They usually meet their mentee once per month to discuss professional questions."

Another positive "empowerment" example has been reported to the Women in Publishing Network from inside a large company, Penguin (UK):

"Working alongside the editorial assistants, I learned about their tasks and duties as well as undertaking some myself... All in all, my five weeks at Penguin were really valuable, and I recommend work experience there to anyone interested in publishing. Penguin is a really big company so you can experience working in many different areas. I have heard stories from people who have done work experience at other publishers but were only given menial tasks and no real insight into the company, whereas at Penguin I was valued for the skills I had and was given a real chance to get involved with the department."⁴⁹

4. Women as Leaders in Book Publishing – Light at the End of the Tunnel?

4.1 Big Business Structures – Glass Ceilings and Walls Persist

In order to complement the data and information on national business structures in the following country chapters, an empirical assessment of the gender dimensions at top decision making levels in structures with a trans-national dimension has been conducted by the ERICarts Institute. On the one hand, this concerns large corporations active in book publishing and distribution, some of which dominate the European landscape, on the other hand, we examined important book fairs which serve as meeting points in Europe for book publishers and their partners or customers.

4.1.1 Publishing Corporations

From the top companies and media conglomerates active in book publishing, five companies from different part of Europe were selected for our study. They are: Bertelsmann/Random House (Germany/USA), Bonnier/Books (Sweden), Groupe Lagardère/Hachette Livre (France), Grupa Mondadori (Italy), Pearson/Penguin

⁴⁹ Mills, Rebecca: "Getting Started – My Work Experience at Penguin". In *WiPlash*, February 2005.

(UK). Where relevant information has been available,⁵⁰ the following top positions were studied: President, CEO and CFO of parent company, management team of the main book publishing arm (comparable information on other staff structures of publishing divisions have proved to be very difficult to obtain).

a) Bertelsmann/Random House

Bertelsmann is a global multimedia giant and Random House is the world's largest book publishing company with subsidiary companies in many countries.

- All 7 members sitting on the Executive Board of Bertelsmann are men
- The Supervisory Board is composed of 15 members of (1 women, Liz Mohn, the wife of the former Head of the Bertelsmann group and main shareholder, representing the Bertelsmann Foundation)
- There are 13 members of the Board (1 woman responsible for Treasury and Finance)
- 5 members of the Board of Random House (one women responsible for Random House UK)
- In the Board of Directors (Geschäftsleitung) of the German subsidiary *Verlagsgruppe Random House* with many different publishing companies are 5 men and 1 women.
- In 7 of the individual publishing houses of the German subsidiary specialising in fiction, biographies etc., all 13 chief executives listed in the Random House websites or in the ILMP 2005⁵¹ are men.
- On the other hand, 9 out of 10 of the heads of Press/Public Relations departments of these companies are women

b) Bonnier

Bonnier AB is a family-owned international media company based in Sweden. It operates over 200 companies. Its operations are divided into six business areas: Business Press, Newspapers, Books, Magazines, Entertainment and Business Information. Bonnier Books comprises book publishers in several countries (mainly in the Nordic countries but also owns books publishers in the UK, France and Germany).

- 11 members sit on the Board of Directors – 5 of which are women (45%)
- 9 executives sit on the Management Board (8 men and 1 woman – Maria Curman - who is President for Books)

⁵⁰ Information collected from annual reports and web presentations of the individual companies, from the *International Literary Market Place 2005 (ILMP)*. Medford, NJ: Information Today, 2004, *Who is Who at the Frankfurt Book Fair* and other sources.

⁵¹ ILMP, *ibid.*

c) Groupe Lagardère- Lagardère Media-Hachette Livres-Hachette Littératures

350 companies make up Groupe Lagardère. Lagardère Media is one of two main business segments dividing the company (the other is Lagardère High Technologies); it is involved in everything from print to audiovisual media (each operating as legally independent companies). Hachette Livre and Hachette Littérature are the two divisions responsible for fiction publications.

- The Executive Committee of Lagardère Media is made up of 12 members, 1 of which is a woman (VP Strategy and Development).
- The Executive Committee of Hachette Livre is made up of 14 directors, 7 of which are women including Director General Dalloz, Directors of Distribution, Communication, Literature, Education, Development and Hachette Illustrated. Those positions held by men are CEO, President-Director General Group Anaya, Directors of Corporate Affairs, Finance, Human Resources, DG Larousse and Director of UK Operations.
- The team of Hachette Littérature is directed by a woman. The editorial group is made up of 5 positions including Chief Editor, Assistant Editor, Press, Foreign Rights and Finance. All these positions are held by women. There are 5 directors of special collections e.g. French literature one of which is a woman (who is the director of essays published by HL on societal issues such as the family, religion, education, etc.)

d) Gruppo Mondadori

Created in 1969, Gruppo Mondadori is Italy's largest publishing house; book publishing represents 52% of its business activities (the remainder being, magazines, printing, advertising, marketing).

- In 2003, Marina Berlusconi became Vice-President of the Group.
- Top Executives of the company sit on a *Management Committee*. In addition to the President, there are 11 Directors sitting on this committee, one of which is a woman (Director of External Relations and Communication).

e) Pearson/Penguin

Pearson is an international media company based in the UK and is the owner of the FT Group, Pearson Education and Penguin Books.

- The Management Team of Pearson is comprised of 8 executive officers – 2 of which are women (Chief Executive Officer and Chief Financial Officer).
- The Chairman and Chief Executive Officer of the Penguin Group is John Makinson and Anthony Forbes Watson is the Chairman and CEO of the Penguin Group (UK)

- According to a case study on the Penguin Group (UK), carried out by the Work Foundation in 2004,⁵² half of the Board members are women. As stated in the report, Penguin UK is to be considered

“a creative environment with a high percentage of female employees... The business is fully committed to diversity in every sense in all activities.”

This assessment of Penguin UK is underpinned with e.g. a rate of 67% female employees and 99% women returning to the company after maternity leave (up to one year with 26 weeks at full pay). Other “Work-life policies” of the company, such as 4 weeks paid paternity leave for fathers; childcare allowance; up to 15 days “compassionate leave” for family or domestic problems, show indeed a commitment that might still be difficult to match by other larger or smaller publishing houses in- and outside of the UK.

On the whole, the picture in the 5 major European media conglomerates with important publishing activities looks less convincing than this last report suggests, at least as far as top decision making positions are concerned. If we consider the positions of President/Chair, CEO, CFO and Chairperson of book publishing divisions, only in 4 out of 20 cases women have made it to the top. Of course, as one can see in section 4.2.1 below, the national assessments in Austria, Finland, Germany and Portugal did not really produce higher figures and, as well, the situation in some of the book publishing divisions can be much better (Hachette!). Results are, nevertheless, disappointing not only in the sense of a loss of experience and compassion, but because companies with women on the top seem to be particularly successful also in economic terms.⁵³

4.1.2 Leading Book Distribution Companies in the EU

Amazon.com

The company is the world leader in book distribution via the Internet, however the scope of Amazon is constantly expanding towards many other types of consumer goods.

- In February 2004, there were 8 Executive Officers of Amazon.com (1 woman, Senior VP, General Counsel and Secretary = 13%) and 6 members of the Board of Directors (1 woman = 17%). As well, the Managing Director of the leading European subsidiary, Amazon.co.uk, is male.

⁵² http://www.employersforwork-lifebalance.org.uk/case_studies/penguin.htm

⁵³ Catalyst: *The Bottom Line: Connecting Corporate Performance with Gender Diversity*. London: 2004

The types of qualifications requested for top positions in this innovative field, can be assessed by examining a job advertisement in 2005, when Amazon.co.uk looked for a *Director of Business Development*. Here is an excerpt:

Experience/Skills:

- 10 years+ enterprise software sales experience with a concentration of enterprise sales experience in the technology, commerce, or retail industry;
- experience selling nascent (embryonic/start-up) products/services into new markets is desired;
- demonstrated track record of closing complex, solution based software sales into top-level executives;
- entrepreneurial or startup experience a plus;
- experience in defining and bringing to market a software solution or product;
- superior communication and presentation skills, the ability to thrive in an ambiguous environment, and a drive for results is necessary;
- passion for success and winning;
- Education to bachelor's degree is required; an M.B.A. is preferred. Travel is required.

Arvato (Bertelsmann)

Arvato is the media services division of the Bertelsmann Group. It consists of 60 subsidiaries in 27 countries and of four operative divisions (printing, services, storage media, and distribution). More than 31 000 people are employed. Arvato has six executive positions (CEO, Head of Storage Media, Head of Direct Services, Head of Logistics Services, Head of Printing and Head of Commerce) – all positions occupied by men.

4.1.3 Main European Book Fairs

The gender-balance at top decision making levels of five major European book fairs was studied in 2004: Frankfurt; Göteborg; London; Paris; Warsaw. In London and Paris, the fairs are organised/run by a multinational company which organises fairs around the world (“Reed Exhibitions”). The evaluation concentrates on positions that are found in most of the fairs: CEO/Managing director, exhibition manager, manager of logistics, head of finance, head of press and communications, director of international relations. However, a few relevant posts were added to Table 2 that can be found only at some of the fairs (e.g. managers in charge of programme or marketing).

Table 2 Gender Balance in the Management of European Book Fairs (2004)

Positions	Frankfurt		Göteborg		London		Paris		Warsaw	
	October		September		March		March		May	
	M	F	M	F	M	F	M	F	M	F
CEO / President	X		X				X		X	
Managing Director				X	X			X		
Conference Manager				X						X
Exhibition Manager	X			X		X				X
Manager of Logistics*						X		X		
Programme Co-ordinator				X						
Programme Assistant				X						
International Department		X								X
Head of Finance / Accounts		X		X		X			X	
Press and Communication	X			X		X		X		X
Sales Manager	X				X					
Marketing Manager						X				
Administration						X				
TOTAL	4	2	1	7	2	6	1	4	2	4
Share of Women in %	33%		88%		75%		80%		66%	

Source: ERICarts evaluation (Internet sites, catalogues)

* Specifications of stands, health and safety regulations etc.

M = Male, F = Female

The result of the exercise somewhat contradicts our earlier findings:

- In all cases, the CEO or presidents of the book fairs are men;
- Top positions on the management teams of the Göteborg Fair (88%), the Paris Salon du Livre (80%) and the London Fair (75%) are “feminized”, with Warsaw following closely behind (66%).
- The Frankfurt Book Fair (33%), the largest in Europe, is below the expectations.

4.2 Results of the Empirical Studies in the Culture-Biz Countries

4.2.1 Top Positions in Publishing Houses

An assessment of gender differences in top decision making positions of publishing houses figured among the main activities pursued by the research teams in the Culture-Biz countries. With the exception of Germany,⁵⁴ no coherent source or referential literature was available at the start of the project, which is why a methodology was developed in order to address the topic via surveying relevant examples of 5 larger and 5 smaller publishers (see Annex for details). While this approach proved useful for national based assessments, it did not allow for comparisons across countries to be made. The reasons for this are manifold and include, first of all, the extreme differences in the size and structure of book publishing companies (e.g., a “large” publishing house in Austria would rank at best as “medium sized” in Germany). There were also big differences in the “typical” management structures of such companies among the different countries surveyed.

Despite these challenges, the aim of the project can be met by presenting the data in a more integrated form, as is done in the following Table 3. This table helps us to better understand one of the main results of the Culture-Biz study: *The more money is involved, the more male domination of decision making positions prevails*. This formula has a double meaning, since “money” can refer both to the economic performance or materialized, “bankable” investments of a company and to the level of remuneration or other financial returns that are connected with a top position (the latter often seen, from a “male” point of view, as a material proof for one’s position in the hierarchies of power and prestige).⁵⁵ Looking on the results of previous research carried for projects in this domain that were co-ordinated by the ERICarts Institute (“Pyramids or Pillars”, “Culture Gates”), we can safely conclude that both connotations are also relevant in this study. Table 3, however, can only help us to assess the influence of the size of a company’s financial operations on the gender composition of leadership positions. Data in the first row of the Table shows that the owner-publishers, mem-

⁵⁴ *Frauen im Kultur- und Medienbetrieb III*. op. cit.

⁵⁵ Here we would need to draw upon fields such as social, particularly anthropological, psychological and educational research that lies beyond the scope of this study, especially as regards gender-differences in the development of personal values during socialisation processes which continue to be influential in work environments. See, for example, Montemayor, R., Adams, G., and Gullotta, T. (Eds): *From Childhood to Adolescence: A Transitional Period*. London: Sage 1990. or Williams, C. L.: “The Glass Escalator: Hidden Advantages for Men in the Female Professions.” *Social Problems*, 39 (3), 1992. For a more recent, comprehensive review of the literature, see Andres, Lesley: *Policy Research Issues for Canadian Youth: Transition Experiences of Young Women* - April 2002. Applied Research Branch, Human Resources Development Canada.

bers of the board directors and CEO's of publishing houses are mainly men. Interestingly, the second row in the Table locates women among the publishing ranks as e.g. editorial directors, other heads of departments or similar middle management positions in the Culture-Biz countries which were surveyed.

Table 3 Leading Positions in Publishing Houses according to Size of Company

Publishing Houses	with More than EUR 100 million Turnover*		with EUR 20 to 100 million Turnover**		with EUR 1 to 20 million Turnover		less than EUR 1 million Turnover	
	T	F %	T	F %	T	F %	T	F %
I. Top Positions	56	12.5	131	11.0	76	13.2	60	21.6
II. Other Leading Positions	55	16.4	203	39.9	220	46.8	64***	50

Source: ERICarts evaluation (from the data supplied in the country chapters).

* only German and Finish publishing houses.

** without Austrian enterprises.

*** no German data available.

T = all positions surveyed.

In addition to the already mentioned reasons for gender differences in main decision making positions, we could, first of all, point to a "generation gap" in larger and medium-sized companies, since such positions used to be given primarily to older, experienced professionals (from the men-dominated business world) or to the elder son in a family. However, these conditions are gradually changing and a new generation of well-trained women has started, during the last decade, to occupy a greater share of decision-making positions in the book trade. For example, the share of female editors-in-chief in Austria rose from 27% (1991) to 44% (2001).

Another aspect explaining gender differences could be what is sometimes labelled as "leadership style" which is, of course, a matter blurred by much speculation. What empirical sociological research suggests, is nevertheless that there are marked differences between a more "competitive style of leadership" among men, "whereas a democratic style is the main characteristic of women".⁵⁶ If such general findings were to be translated into the business characteristics of publishing houses, one might come to the conclusion that in an environment which is increasingly shaped by corporate domination and investment strategies, competitive leadership skills are highly sought by companies and their shareholders.

⁵⁶ Nicolaou-Smokoviti, Litsa: "Business Leaders Work Environment and Leadership Styles". In: *Current Sociology*, May 2004, Vol 52(3)

A different perspective is provided in Culture-Biz Finland. The newly emerging SME's are returning to "the traditional mission, according to which publishing houses should not only enhance profitability but also produce 'better books' ". These companies are increasingly being created and run by women and thus could widen the gap between the roles attributed to men and women in the publishing sector.

This perspective regarding the potential differences in objectives or motivations between men and women in the pursuit of a career is also underlined by in an interview conducted with a female editorial director of a major publishing house in Portugal:

"The dream of reaching the top and being a super-woman is rather old-fashioned in my opinion. It harks back to the 1980s and 1990s – at least that's my feeling. I don't have any objective indicator that I'm aiming to achieve. Suddenly women no longer feel that it's important to prove themselves. If I'm able to be a director and have a child I would prefer that option than not to have children. I think women today are more interested in conciliating different issues and achieving a higher quality of life. Women have already conquered a great deal. They're now more interested in getting new ideas across. Of course they need to occupy a specific function but in general terms women feel less inclined to accept what formerly appeared to be an obligation – to pursue a career at any cost."

4.2.2 Distribution, Book Fairs

There are no great differences recorded in the different Culture-Biz country studies regarding gender balances in the area of distribution with two exceptions:

- *large book shops and chains* in Germany (with a turnover above 3.5 million Euro) show similar ownership and management structures as those already illustrated in Table 3: the share of women is below 15%, while it can be up to five times higher in small-scale book stores. Earlier efforts towards "all-women-bookstores" did not prove a very successful business model and most of them disappeared over time.
- *distribution companies* in Portugal are predominately staffed with men whether it be among the decision-making executives or as regular employees or sales agents.

Regarding *Book Fairs*, the Culture-Biz national studies produced similar results regarding the share and position of women among the management teams, with two exceptions:

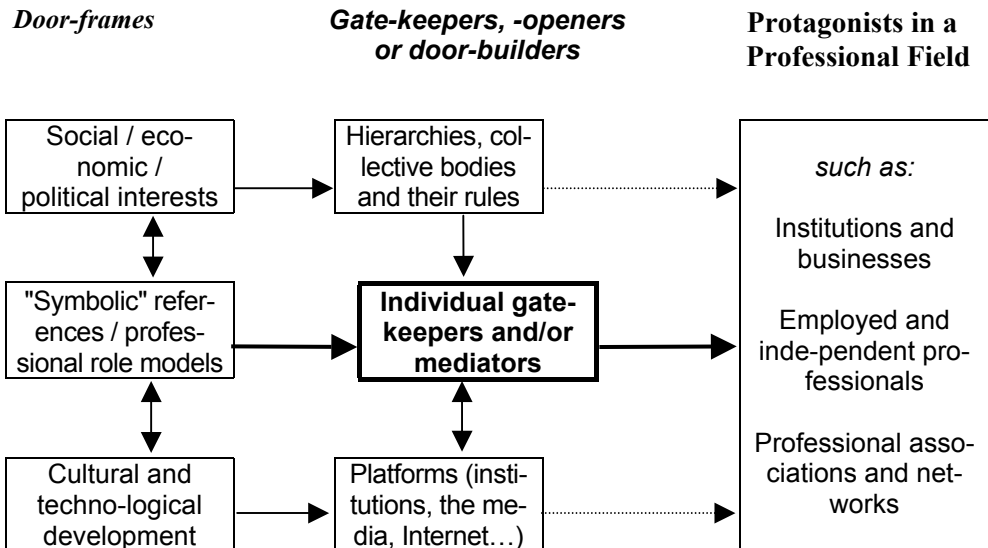
- The share of women among the management teams of book fairs in Portugal is ca. 40%. They are mainly responsible for organisational type jobs and for the cultural programme associated with the fairs.
- Data from the Helsinki and Turku book fairs show a widely feminized field of professional activity: in 2004, only 4 out of 24 responsible actors (management and Boards) were men.

This latter finding is indicative of other European book fairs and may have contributed to the fact that specific feminist book fairs (or those that are at least addressing this field prominently) have become scarce in Europe – which, by the way, is different in other parts of the world, e.g. in Canada and the USA, Asia, Australia.

4.2.3 Gate-keeping Aspects Related to Book Publishing

The concept of “gate-keeping” has been customised taking into account the specificities and dynamics of the creative sector in a former project of the ERICarts-Institute supported within the framework of the EU Community Framework Strategy on Gender Equality:⁵⁷

Figure 1 A Multi-step Model of Gate-keeping Processes



Source: ERICarts 2003.

This concept, if adapted to the book market, would then find e.g. critics, trainers, professors or jury members at the centre as individual gate-keepers, together with

⁵⁷ Culture Gates. op. cit.

hierarchies and top decision makers from the “big market players” above and e.g. networks or Internet platforms addressing issues of relevance to the book market (and its gender dimensions) below.

What we can show from the empirical surveys conducted in the Culture-Biz country studies are a few examples of how gate-keeping functions and their gender balance could influence some of the conditions and standards of book publishing that have been discussed before.

- As we have learned, a great majority of students engaging in training and studies related to book publishing are women. Their *professors and mentors*, however, are still predominantly male. For example, 62% of the teaching staff of vocational schools and academies associated with the German book trade are men. Even if such figures are lower than those in other cultural disciplines, they can perpetuate certain role models and stereotypes.
- A similar problem arises, as leading figures, e.g. chairpersons or boards of *professional and promotional associations* are mostly men, while those they are serving or setting the standards for are mainly women. This can be demonstrated with the example of Finland, where the Board of the Association of Finnish Publishers (despite its female President) is composed of 75% men and also the Boards of the influential Society for Finnish Literature and the Finnish Centre for the Promotion of Reading are predominantly male, while the majority of the staff is made up of women. According to the Finnish report, the recipe is quite simple and is found in other areas of the cultural sector:

“The men have the majority in the boards, the women on executive managerial level. A clear majority of employees are women... In maintaining public relations and overall promotion activities, meticulous planning, co-ordination and management tasks are delegated to women, men maintain, however, the control of economic and technical decision-making functions.”

- The control of literary standards and the promotion or dismissal of new names and professional trends is the task of *critics and responsible editors in the media*. These functions are of great importance not only to authors but also to their publishing houses (and, in particular, to the career success of their highly feminised editorial staff). Once again we find grave gender imbalances: in Austria, only 1 out of 7 editors-in-chiefs of the “top literary magazines” is a woman (and even among editors, there is a majority of men). Almost 90% of about 30 “most influential cultural critics of 16 leading newspapers” in Finland are men. In Portugal “only” 62% of the book

critics in newspapers and other media are men. All 9 critics of the influential “Revista Ler / Círculo Leitores” are men.

- Finally, one of the most significant examples of gate-keeping functions in literature can be seen by examining the composition of those members of *prize juries and decision making bodies for grants* and other forms of promotion and funding. First of all: there is a relation between the composition of juries and that of award winners. The Austrian example shows this relation very clearly with a range of awards of international significance: In 1991-93, the share of women in juries was 39%, that of award winners 36%; in 2001-03, this share had risen to 44% both for jury members and award members. Similar trends could be verified in Germany over a period of 25 years. In Finland, women represent exactly 1/3 of all authors nominated for the prestigious Finlandia Prize. A similar share of women is found on their grant-giving boards of relevance for literature.

Is there hope for the future? Gate-keeping structures in the countries surveyed do not leave much room for hope. There are fears that the “institutionalized” part of literary life with its important standard-setting functions will remain, for a longer period, a male-dominated area.

There are, however, some rays of optimism that are starting to break through these dark clouds as a new generation of (female) publishers emerge and are being recognised. For example, the “International Young Publisher of the Year Award” launched by the British Council at the London Book Fair in 2004 is designed to “celebrate the entrepreneurial abilities of a young person working in the publishing sector”. In 2005, the majority of those on the short list were women and the prize was awarded to Maria Deskur from Poland.

5. Conclusions

Despite the challenges facing the upwardly career development of women in the book publishing field - caused by persisting traditional male role models and the glass ceiling between upper and middle management positions in trans-national corporations and national publishing houses - the Culture-Biz analyses have shown there could be a *further feminisation of the book publishing industry*. Some of the main factors and trends contributing to this development which we could identify from the country studies and from additional research are:

- A *traditionally high rate of female participation in the book sector* as a whole and also in book publishing;
- A continuous *market expansion of small and niche publishers*, some of which operate quite successfully;

- The *media, new technologies and the Internet* as facilitators also for women's start-up companies;⁵⁸
- More *qualified women with management, marketing and ICT skills* entering labour markets;
- *Networking* as an increasingly common tool used by women, though exercised in a different, often more professional style than in "old boys networks" or in earlier feminist initiatives of the 1970s and 1980s;
- *Changing lifestyles, working practices and generational role models.*

The changes in practice and in mindsets - albeit slow - are highlighted in two interviews conducted with female managers from Portugal:

"The publishing world has changed a great deal over the last 10 years. The role of the editor has lost relative importance and has been substituted by the role of the company manager, responsible for administering the publishing house. The trend in Portugal is for managers and management staff to be men. (Management) courses were primarily attended by men in the past. This is no longer the case because there are many more women in the universities."

"Attainment of management positions in any structure is always a question of availability. Today the situation is a bit more relaxed. It is possible for a woman to have children and pursue a career. But she will always face problems. In my case, I don't have children. For women of my age it was very difficult to be a mother and advance in one's career to a management position. People are now more understanding of a woman's right to maternity leave, but it is still very difficult. A mother or father is unable to predict when their son or daughter may have problems that make it necessary to stay at home with them. Unfortunately this makes it impossible for some people to occupy management positions."

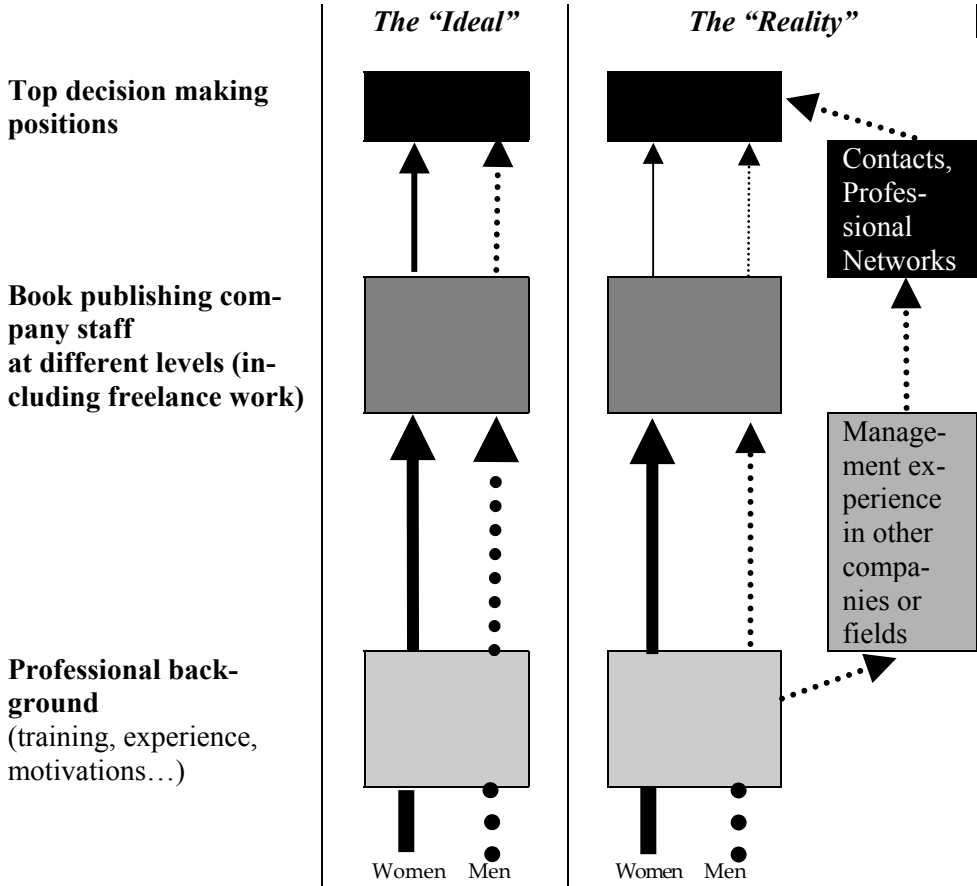
What may not change as quickly is male domination:

- in top positions of large corporate media structures and other companies relevant for book publishing, where a *powerful combination of money – influence – prestige* is at stake; and
- in *gatekeeping-positions* (media, training, juries, etc.), where professional standards are set and new trends are created.

⁵⁸ Today, special networks try to assist women who want to start their own business using new technologies, cf. <http://www.digital-women.com> where we read: "What is a Digital Woman? She is a woman who has a connection to the internet, is TIRED of working the 9 to 5 or for the corporate big guys, wants to network with other women online, wants to start or run a legitimate business of her own choosing..."

With regard to typical *career paths in book publishing* – for both men and women – we can conclude from the evidence presented in the overall Culture-Biz study that there is still a great difference between the “ideal” and “current realities”, as demonstrated in the following Figure 2 which shows how men have traditionally circumvented or avoided long or drawn out processes to achieve “success” in their career paths by reaching the “top” of the corporate or company management ladder.

Figure 2 Career Paths in Book Publishing



Source: ERICarts 2005.

This situation may influence the career decisions made by women and could even discourage some of them from competing for main decision making positions in the book publishing field.

Obviously, some general developments in society as well as improved social and economic conditions can influence and provide a more satisfying working life for women and may even provide incentives for them to start up their own independent businesses. Gender equality policies or anti-discrimination laws are among those conditions which can help, however, they are not considered as priorities in

either the book publishing or in larger cultural sector. Professional strategies of empowerment or mentoring and adequate learning and working environments are considered of great importance. Much of the political talk on the need for more “work flexibility” may sound somewhat strange to women, especially since they are already forced to be flexible in their daily struggles to combine private and work life; much more so than men. What they appreciate, however, are efforts to make this combination more feasible, e.g. as regards family-oriented time schedules (for both men and women) and economic rewards. Measures discussed in different countries under the headline “Work-Life-Balance”⁵⁹, and sometimes already implemented in co-operation between public authorities, employers and staff representatives, would surely benefit women striving for a career in book publishing.

⁵⁹ cf. the example of Penguin UK mentioned under section 4.1.1 and a recent comparative study for the German Federal Ministry of Family, Senior Citizens, Women and Youth, Rürup, Bernd and Gruescu, Sandra: *Familienorientierte Arbeitszeitmuster – Neue Wege zu Wachstum und Beschäftigung*. Berlin: 2005.