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# “THE RISE OF A SERVICE-BASED ECONOMY AND ITS TRANSFORMATION: THE CASE OF RIMINI”

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## The rise of a service-based economy and its transformation: the case of Rimini

### 1. Introduction

Although there have been many studies on industrial sectors' contribution to European nations' initial economic development, little is known about the role played by the service industry (with the exception of financial services). In recent years, the increasing economic importance of tourism has led many scholars and policy-makers to explore tourism as an engine of growth in less-developed regions. Recent studies have focused their attention on the tourist sector's positive impact on redressing the balance of payments, but no study has yet analysed its effect on regional development and the formation of a local supply of industrial goods.<sup>1</sup>

This article presents the case study of the Italian province of Rimini in Emilia Romagna, which currently boasts a per-capita GDP over and above the national average (in 2002 it stood at € 23.672 compared with a national average of € 19.403), and an economy based largely on two sectors, tourism and manufacturing industry (which stand respectively for 25% and 15% of GDP).

Today, the province of Rimini boasts some 15 million hotel presences a year (7% of the national total), and is considered to be the seaside holiday capital of Italy, as well as being home to numerous manufacturing industries. It would have been difficult to foresee such a result one hundred years ago, when the tourist industry was just beginning to get off the ground, and manufacturing was practically unheard of in an area whose economy was based almost exclusively on agriculture: indeed, 71% of the population were employed in agriculture in 1871. Moreover, this sector was dominated by sharecropping and smallholdings, and as such had shown little propensity towards change (crop rotation with forage was still unheard of, and cash crops were still a rare occurrence), and had failed to stimulate the creation of any food-processing companies. The only dynamic element within the province was the presence of a medium-sized town, Rimini, which displayed a certain liveliness as shown by the publication of numerous local newspapers, the presence of some provincial banks (as the Savings bank of Rimini set up in 1841) and the existence of many artisans and shopkeepers: between 1860 and 1900 some 62 papers came out (20 of them focusing on tourism).<sup>2</sup>

Rimini's economic history is very interesting for many reasons. First of all for its organisational model that has always been based on small businesses instead of large corporations. As a matter of fact the distinguishing characteristic of Rimini's tourist and manufacturing companies – which have displayed a remarkable continuity over time - is their size: in fact, the majority are either small or very small. Just over one hundred local companies have managed to grow beyond such dimensions, in terms of both workforce and turnover, to become members of the category of medium-large manufacturers, albeit ones still run along family lines.

Consequently, it wouldn't be possible to understand the development of Rimini and the success stories of thousands of small companies without taking into consideration the literature on the networks of small and middle size enterprises, on industrial districts and Putnam's essays on institutions (1993). Putnam emphasizes in particular how civic traditions and the presence of many related non-profit associations improve the efficiency of a region's institutions, above all political ones. Becattini's research on industrial districts shows that civic traditions are of fundamental importance in understanding the network of informal relationships built through local associations and institutions. According to Becattini, these informal relationships stimulate collaboration among entrepreneurs and the diffusion of information among small companies, which provide the basis of their competitive capability. The most important feature of the local community is thus its relatively

homogeneous system of values and views on work ethic, family issues, cooperation and even acceptance of change. In a district, a system of institutions and rules usually develops in such a way as to spread the values throughout the area, shaping in the end the so called “social capital” which allows the natural springing of many interrelated industrial initiatives.<sup>3</sup>

This is the very context in which Rimini’s tourism and industry have grown. The presence of a district can be gathered from the network of connections and cooperation that link the different social groups living in Rimini: the lively middle class who created and managed the businesses, the city administration, the local banks and the members of its numerous associations, as recent literature has pointed out.<sup>4</sup> Thus, we can say that its district identity was a powerful engine of growth for local development, the middle class was embedded with the well known “industrial atmosphere” which pervades the territory and addresses entrepreneurial talents towards different business activities.

The aim of our work is to highlight two mechanisms that enabled seaside tourism to become an engine of growth for the local economy. Sections 2 to 4 focus on the creation of a tourist district and the first-ever group of local entrepreneurs during the Twenties. Section 5 explores the way in which tourist demand after the Second World War encouraged the growth of industry, with the development, on the one hand, of those industries supplying the instrumental goods associated with the tourist and building boom (brickworks, cement works, timber and furniture production, manufacturers of furnishings, plant production and certain sectors of engineering); and on the other hand, with the radical effect of mass tourism on the growth in the numbers and size of food manufacturers and of those companies producing consumer goods bought directly by tourists: clothing, shoes, pottery and ceramic ware, and souvenirs of various kinds. Industry in the Rimini area subsequently consolidated its position independently of local tourist demand, and proved capable of developing into a valid labour market during the crisis years of the seaside holiday model. In conclusion, in the Fifties and Sixties the tourist district widened its base through a demand induced growth of local industrial producers and in the eighties a new autonomous industrial district was finally able to grow on its own. This is how tourism has fostered local industrial development in the case of Rimini.

## 2. The bathing establishments: from pastime to industrial status

Tourism was the first non-agricultural economic activity to be developed in the province of Rimini, as the Chamber of Commerce repeatedly points out in its annual reports: in 1872 it stated that the advent of bathing establishments had produced “a growth in all arts and crafts, and in particular in the sale of fabrics, clothing, knick-knacks and foodstuffs”; while in 1884, it noted that the bathing establishments represented one of the major economic sectors in town since, in attracting outsiders, it had led to an increase in trade.<sup>5</sup>

Rimini is a seaside resort with a beautiful town centre that embodies two thousand years of history. In fact Rimini’s history began in 268 B.C. when the Romans founded the colony of Ariminum, that was a road junction with connections to central and northern Italy and opened up trade by river and sea. The Roman age left an important heritage to the town such as the Arch of Augustus (built in 27 B.C. as an honorary gate to celebrate Octavian Augustus), the Tiberius Bridge (began under the Emperor Augustus in 14 A.D. and completed under Tiberius in 21 A.D) and the Amphitheatre (which dates from the second century). In the fourteenth century the city became a municipality and numerous convents and churches were built, providing work for many artists: Giotto inspired the fourteenth-century Rimini school. The most important monument of the time was the Malatesta Temple, designed by Leon Battista Alberti and considered the origin of Italian Renaissance, with important frescos inside (by Giotto and Piero della Francesca). Besides, in 1437 building work on Sigismondo Malatesta’s residence-fortress began and lasted around 15 years (today, only the central nucleus remains). At the end of the sixteenth century, when Rimini had already become a small town of the Papal States, the municipal square was redesigned. For

example, a small temple dedicated to Sant'Antonio of Padua and the Clock Tower block were built in the 'grand square', which was where markets and tournaments were held, giving the square its present shape and size. During the seventeenth and eighteenth century some grand tourist like Montesquie dwelled in Rimini for some days and got a positive impression of the town: "Rimini, beautiful city...Two beautiful squares and some ancient monuments...The Saint Francis church is magnificent...". Rimini is also the native town of Federico Fellini (1920- 1993), the well know Italian art director, who won four Oscars for his films *La Strada*, *Le notti di Cabiria*, *Otto e 1/2* and *Amarcord* and one for his career.<sup>6</sup>

Despite this important heritage Rimini never became a cultural tourism destination but linked its success to seaside tourism. As the fine work by Alain Corbain recounts, the "invention" of the seaside and of seaside bathing was deeply rooted in Italian tradition: the travel diaries of those writers who had embarked on the "Grand Tour" mentioned bathing and water sports enjoyed by groups of young people along the Italian coast from the late 16<sup>th</sup> century onwards.<sup>7</sup> As regards the Adriatic coast (the coast along which Rimini is situated), various police reports mention this pastime, which from the 19<sup>th</sup> century onwards involved all age-groups and social classes.<sup>8</sup>

Public ordinances provide further proof of the fact that the bathing fashion had become quite popular, and as such was deemed to require the moral control of the authorities. Indeed, an ordinance issued in the town of Pesaro (50 km south of Rimini) on July 15<sup>th</sup> 1814, stated: "nobody must appear naked on the seashore at bathing time .... All those who wish to bathe are forbidden from taking off their clothes unless they have reached the point where they intend to bathe, and must enter the water without delay"<sup>9</sup>. The same public notice contained an invitation to the local administration to visibly separate the spaces reserved for women from those reserved for men.

During the first half of the 19<sup>th</sup> century, a number of seaside resorts along the Adriatic coast developed economic interests based on this new bathing phenomenon, which was gradually transformed from a pastime to a marketed service. The growth of this phenomenon in Italy was fifty years behind the development of bathing establishments in England and around the coasts of northern Europe. This delay can be put down to three principal factors: the distance of the coast from those urban centres that furnish the demand for such services – that is, the large industrial and administrative cities of that period; the environmental characteristics which made seaside holidays in the winter rather unappealing; the general economic backwardness of Italy compared with other countries, which slowed the formation of the demand for tourist services. In fact, the development of tourism along the Adriatic coast was based almost exclusively on domestic demand (which could perhaps be better described as "local" demand), and followed the pace of Italian industrialisation, which we all know only really got underway during the last few decades of the 19<sup>th</sup> century. The only exception to this trend was the Venice Lido, which thanks to its proximity to one of the most popular cities of art among tourists from all over the world, managed to create a winning image in the eyes of European visitors, and at the beginning of the 20<sup>th</sup> century became a meeting place for wealthy persons from a variety of different countries.

In general, investment in tourism along the Adriatic coast was characterised by a common pattern: in the period between 1820 and 1890, the first bathing establishments were built; between 1880 and the First World War, the first forms of tourist accommodation (in this case seaside villas and a few luxury hotels) were built; finally, the interwar period saw the growth of a local hoteliers class. It should be said that the development of such an entrepreneurial class was hardly a universal phenomenon at that time.

The first sizeable investment consisted in the construction of the earliest bathing establishments (albeit made of wood)<sup>10</sup>: initially this phenomenon was restricted to larger towns such as Trieste, Ancona and Venice, which could count on a sizeable local clientele: the bathing establishments played a similar role to the public gardens, that is, they constituted a recreational centre for local residents. It was only some time later that they were built in smaller towns such as Rimini, Pesaro, Fano and Senigallia, as an initial form of tourism began to take shape around these establishments.

Generally speaking, the management of the 19<sup>th</sup> century bathing establishments did not prove to be a particularly profitable activity: there was still relatively little interest in bathing, and the limited number of holidaymakers prepared to pay for the privilege made it difficult to cover running costs. Initial investors came from the upper classes, and included landowners, the professional classes and the more important traders; but soon after, their place was taken by local councils, as a result in fact of the losses made by the former: this happened in Rimini, Senigallia, Porto Corsini (Ravenna) and Cesenatico. In other resorts, such as Grado, Cervia and Cattolica (the latter situated in the province of Rimini), the local councils beat private concerns in building the first bathing establishments<sup>11</sup>. Overall, these initial investments failed to produce a new entrepreneurial class, since they remained rather sporadic events (there were only one or two bathing establishments in each town) and because they did not manage to create successful enterprises (most in fact had to be rescued from bankruptcy by the local council in question).

During the second half of the 19<sup>th</sup> century, those places that had set up the first bathing establishments began to realise that they had a problem accommodating the growing number of visitors: this dilemma was resolved by the construction of a series of small holiday villas and by the layout of towns along garden-city lines, regardless of the fact that this model had been specifically designed for the working-class towns of Britain rather than for the holiday resorts of the Adriatic coast.<sup>12</sup>

The town of Rimini was one of those that adopted this model of town planning: in 1882 there were about 30 such small villas, whereas there were no hotels other than a couple of inns in the town centre for passing trade. In 1885, the first specific accommodation for holidaymakers was provided after the local council had purchased a vast expanse of coastal land from the state, and then sub-divided it into smaller plots to be sold to private buyers wishing to build holiday homes. The main local bank, the Rimini Savings Bank (Cassa di Risparmio di Rimini), was also involved in the parcelling-out of the said land, constructing three villas and granting small loans to private buyers.

In 1905 Rimini had some 200 small villas but only 5 hotels, two of which were situated in the town centre and were normally used by travellers passing through (rather than by holidaymakers as such), while the other three had been transformed from pre-existing villas: Villa Adriatica, from 1896 on rented by an aristocratic family (Umberto De Comis and his wife, Baroness Antonietta Benzi) and transformed into a luxury hotel; Hotel Lido, the management of which had been taken over by a hotelier from Rome, one Mr. Mengani; and a third hotel, of which no information is available. The supply of hotels was strengthened in 1908 with the opening of the Grand Hotel (built by a Milanese company, and then taken over by a second company with Austrian and Hungarian shareholders) and the Hotel Hungaria (set up by a Russian magnate, Dimitri De Gravenhoff, and managed by a Hungarian hotelier). Up until the First World War, Rimini was not very different from the other resorts along the Adriatic coast, except that it was slightly ahead of the others. The few hoteliers were much like other Italian entrepreneurs of the Belle Epoque: they had the ability to deal with wealthy customers, and they had learnt their trade either abroad or in one of Italy's many artistic or religious cities or towns.

The period between the two wars represented a watershed from this point of view, in that it saw the arrival of a new social class in the Adriatic's seaside resorts, consisting of office workers, professionals, traders and the like who wished to spend their holidays in less ostentatious surrounds than those provided by the grand hotels of that age. It was during this period that the increase in tourism, and thus in the demand for accommodation and other services, was to lead to the growth of the local hotelier class; Rimini was one of the first resorts to experience this new development.

There had been a clear transformation during those years: the number of hotels in Rimini rose from 14 in 1913 to 137 in 1938, while the number of bathers increased from 18,750 in 1922 to 74,953 in 1934 (see table 1 above). This radical change had been encouraged, among other things, by the luxury hotels built in the town prior to the First World War, and by the presence of certain important political figures among the town's holidaymakers, including Benito Mussolini himself,

who spent his holidays on the beaches of Rimini and of nearby Riccione. Rimini's success was based on the town's ability to exploit such opportunities and also to create structures capable of accommodating the middle-classes who had by now begun to frequent the area's beaches. In other words, the merit of having triggered off the development of tourism in Rimini and having created the premises for the town's industrialisation, goes to those entrepreneurs who set up and ran Rimini's first 137 hotels and guest houses: they gave life to the first-ever Italian tourist district.

Even if the war interrupted the steady growth of tourism in Rimini, as elsewhere, the re-awakening of the tourist industry since 1947 marked the beginning of a remarkable period of growth, due in part to the winning formula of average or low-cost services, which saw the rapid expansion and popularity of Italian tourism: in 1963 more than 1300 hotels housed 385.000 tourists (which corresponded to 5.700.000 overnight guests). The renaissance of tourism was also aided by financial help, in the form of the Marshall Plan, whereby those funds granted were employed to renovate the town's existing hotels. The Adriatic Riviera was the first area to recognise "the changed social and psychological conditions in Europe", and not surprisingly, one-third of tourist presences during the 1950s were provided by flows of foreign tourists.<sup>13</sup> Directors of tourism and financial operators within the Rimini area were the first to realise that after the war, tourism was no longer the "preserve of the few, but the need of many".<sup>14</sup> In the 1950's and 1960's Rimini became one of the most famous European mass tourism resorts. During the Seventy's, since competition from foreign resorts had grown, Rimini's business leaders invented the leisure district. Discothèques and amusement arcades were the new reference point for holiday makers. Finally, after the crisis of sea algae in 1989, local administration and hoteliers largely invested in conference and trade fair tourism.<sup>15</sup> In conclusion Rimini's tourism history is the example of a great and lasting success due to the network of a myriad of small and middle size enterprises, that is to the creation of a tourist district. Because the formation of this district dates back to the interwar years, in the following sections we will investigate the history of entrepreneurs and companies which had been set up in those years.

### 3. The formation of an entrepreneurial class: the case of Rimini

In order to understand how Rimini's entrepreneurial class was formed, we have constructed a database of all those who set up hotel businesses in the town during the interwar years.

Using the Forlì Chamber of Commerce's companies archive, we have been able to draw up a list of the hotel companies set up during the period 1928-1938, complete with the names of their owners (unfortunately the information pertaining to those years prior to this period is not available). We were then able to use the Rimini registry office's archives to establish the professions exercised by the owners of the said businesses (and by their family members) in the five years prior to the opening of their hotels. Thus we were able to build a database of the 131 hoteliers, of their spouses and, in the case of unmarried persons, of their parents, including the respective professions they exercised in the five years leading up to the opening of the hotel in question, their ages and their places of origin.<sup>16</sup>

The first interesting point to note is that the majority of hoteliers were women (57%) who had had no prior stable job, most of them having been housewives (80%) up until that point. Thus the growth of the tourist industry coincided with the initial appearance of significant numbers of women on the labour market, some of whom in important positions (see table 3).

The second significant result is the high percentage of married hoteliers: in a context in which the majority of people begin working at a relatively early age, this figure would seem to suggest that the running of a hotel required the contribution of the entire family, and thus was something that most people embarked upon only after they had got married (see table 2).

The most important characteristic is, however, the social background of the new entrepreneurial class: the majority of them were from the urban middle classes – small traders, craftsmen, railway

workers, private-sector white-collar workers – whereas very few came from the rural classes (be they landowning or labouring) (see tables 3 & 4).

The reconstruction of the characteristics of the early hotelier class in Rimini enables us to analyse those factors that contributed towards the emergence of such a talented group of entrepreneurs. The first of these factors is without question the presence of the town itself, its business activities and its network of social relations, which made it possible to create what we may define as the all-important “culture of hospitality”. Despite the prominence of agriculture, Rimini was an ancient town (see section 2) that housed the traditional urban activities such as artisans, shopkeepers, different kind of employees (in school, in the railways company, in the City Council), newspaper and books printers and editors and so on. It is interesting to note the relatively limited presence of landowners, who in previous years had shown a certain interest in tourism, and had in fact set up the very first bathing establishment in Rimini in 1843. The capabilities to welcome people and to relate to foreigners were strictly connected to the Rimini urban tradition.

However, there is another important factor to be taken into consideration, and this is the correspondence between the social class of hosts and guests: while in the period of aristocratic tourism, luxury hotels were often run by members of the same aristocracy, during the interwar years, both tourists and hoteliers often came from the urban middle classes. It would seem that in a context in which the hotel trade had still to be raised to a professional level, remaining based as it did upon the informal skills and the attitude of the entrepreneurs, membership of the same social class – and thus the sharing of the same rules of behaviour and the same style of life – made it easier to identify the kind of services required by the hotels’ guests. In Rimini, as elsewhere in Italy, there weren’t any hotel school and it didn’t exist the possibility to get a formal training in this sector. The first hotel school in Rimini was inaugurated in 1937.

The financial aspects of the matter are also of importance: since these entrepreneurs often did not possess any capital of their own, nor were they the owners of the hotels, they needed access to bank loans and thus had to furnish guarantees to the banks in the form of either revenue from a trading licence, a fixed salary of one of the family members or the home they owned. Once again the town, with its banks, trading licences and stable salaried employment, seemed the only feasible setting for the development of a local entrepreneurial class.

Another factor that may have facilitated the proliferation of entrepreneurs, and above all of businesswomen, is that of the social valorisation of women. There can be no denying that many of the services provided by hotels required skills which at that time were held prevalently by women, as a result of their experience as mothers and housewives, and thus the considerable presence of women in this sector is hardly surprising. Nevertheless, the fact that many woman were actually proprietors or managers of these family-run hotels required a situation in which women were deeply involved in the social and economic life of the community. In fact, proprietorship of the family business was not a purely formal role, but indicated an important part played in the running of the said business. Those women who during the 1920s and 1930s set up hotel businesses were, in fact, in the main the wives of railway employees (there was an important railway yard in Rimini employing large numbers of workers), of traders, of clerks and other salaried employees; given that the husbands often continued with their careers, they could only make a partial contribution to the management of the hotels.

Having analysed the characteristics and origins of the new entrepreneurial class in Rimini, we need to comment on the local context in which this transformation took place. During the interwar years, Rimini remained a prevalently rural area with very few manufacturing companies: moreover, agriculture, which was still dominated by share-cropping and small-holdings, had showed little propensity towards radical innovation (crop rotation with forage was still unheard of, and cash crops were rare). This economic “backwardness” partly explains the Chamber of Commerce’s frequent reference in its annual reports to the contribution of the bathing establishment sector to the local economy since 1844, and underlies its claim that this sector was indeed the town’s most important since “in attracting outsiders it increased trade”.<sup>17</sup>

There was thus a steadily increasing conviction that Rimini's tourist industry could make a significant contribution to the growth of the local economy. During the interwar years, this conviction was strengthened by the belief that investment was the only thing that could guarantee growth in this sector. "Rimini has to attract considerable investment .... During the past season (the summer of 1925 – author's note) ... the number of hotels has proven insufficient".<sup>18</sup> "This year, thanks to widespread advertising abroad, we have managed to increase the colony of foreigners on our beaches ... If we had had sufficient hotels, many more would have come, especially from central Europe".<sup>19</sup>

Among other things, there was widespread belief in the need to invest not only in the hotel sector but also in providing tourists with holiday entertainment. In 1923, a local broadsheet, the *Corriere dei Bagni*, clearly pointed out that "possessing the finest beach in Europe" was not enough to guarantee the growth of tourism. "Rimini's problem is of two orders: it needs to procure all that is necessary, besides the natural beauty of the place, to provide a pleasant holiday setting for those tourists with refined tastes; and it also needs to ensure that this provides a profit to those who have invested in one branch or other of the bathing industry .... Our season is too short ... because our beach does not offer those, let's say artificial, attractions that can bring in certain categories of tourist before the month of July and persuade others to stay after August".<sup>20</sup>

We could therefore say that during the 1920s and '30s, an entrepreneurial spirit already pervaded a tourist trade which perceived things in terms of investment and returns, and no longer saw tourism in terms of unearned income from the presence of sea and sand. This "industrial spirit", in the words of Becattini, underlay investment not only in the hotel sector but also in that of entertainment.<sup>21</sup>

Another feature of this same cultural vision was that of professional training: in fact, whereas villa holidays only required the presence of maids, the running of hotels and guest-houses called for specialised personnel. In order to resolve this problem, in 1937 the Tourist Office in Rimini, together with the professional bodies in question, set up a three-year course for all those young people who wished to train for a career in the hotel and tourist industry. Moreover, a three-month specialised course, open to everyone, and various foreign-language courses were also set up.<sup>22</sup>

Thus the tourism sector proved of vital importance for the town's economic development, as it succeeded in transforming the skills and knowledge already present in the town into entrepreneurial talent.

##### 5. The growth of two family businesses: the Vanni Mulazzani's and the Calesini's

In this section we will present two case studies which allow us to illustrate how these small to middle sized firms started up and acquired the adequate working know how: the Vanni-Mulazzani's family and the Calesini's family which started their activities respectively during the thirties and sixties. Nowadays, both the Calesini's and the Vanni-Mulazzani's own and manage some hotels in Rimini. More precisely the Calesini's own two hotels, the 54 roomed Junior hotel (3 star) and the 79 roomed Admiral Palace hotel (4 star) which became part of the internationally known Choice hotel group in 1999 after signing a franchising contract. While the Vanni-Mulazzani's own and manage the 30 roomed Nella hotel (2 star).

Despite the different chronology, the two cases share many characteristics. First of all both companies' growth has been financed by accumulated profits, bank loans and credits given by their goods and services suppliers. More precisely both families began their business opening very small guest houses that were converted to middle sized ones only after significant accumulation of profits and thanks to the specific choice of working only with local artisans and local producers of intermediates (construction companies, producers of furniture and frame, etc.) which usually accepted to be paid for their services only when the tourist season was over. This was a crucial aspect because the families' reputation in business was the key which permitted them to pay for services and goods only after the tourist season was over and sometimes the contract of payment

was spread over 2 or 3 seasons. Small artisans could accept these conditions because they had first-hand knowledge on the business viability of their clients and saw the opportunity to place their trust and thus increase their own activities.

Secondly the two case studies demonstrate the high propensity to investment of Rimini's families which repeatedly invested all their savings in their companies. Thirdly the two business histories highlight the role played by the urban middle class in creating new entrepreneurs for the tourism industry. Finally they show how women became managers of these family-run hotels.

The Vanni-Mulazzani family entered the hotel industry in 1936, when Nella Vanni (1898-1981) decided to transform part of her house into a five roomed guest house. Born in Tuscany, after marrying Salvatore Mulazzani, a tax officer, she travelled a lot (Bolzano, Genova, Ancona) until in 1932 she settled in her husband's native town, Rimini. At the time she was a housewife with four children<sup>23</sup>. When the elder son started secondary school, Nella decided to contribute to her family income and entered the hotel industry. Her small guest house welcomed a great variety of customers: from the Italian middle class to the foreign wealthy bourgeoisie (coming from Switzerland, Czechoslovakia and Hungary). Nella without any formal training in this field managed the guest house and was directly involved in buying supplies and cooking. The laundry and the cleaning room activities were carried out by seasonal workers, generally women residents in Rimini. During the war the building was seriously damaged and the tourists' arrival was interrupted. After the war the guest house was rapidly restored and reopened in 1947. At the time, Ilio Mulazzani, Nella's youngest son, began to help his mother in running the business. Differently from his sister and brother he couldn't finish secondary school because of the war and therefore his father oriented him to the hotel business. As soon as tourists returned to Rimini Nella's guest house welcomed an increasing number of customers to the extent which in the first half of the fifties the family made the first important investment, building a new floor and tripling the rooms: from 5 to 17. The clientele was composed of members of the Italian middle class and some German and Dutch tourists.

In 1962 Ilio Mulazzani got married and his wife soon started to work in the hotel. After the widening of the family and considering the positive trend of Rimini tourism, Ilio who at the time had already taken over his mother's business, began to plan further investments. 1966 was an important turnaround in the family history because with the profits accumulated over the previous decade and thanks to a Bank loan (by the Savings Bank of Bologna), the Vanni-Mulazzani decided to demolish the old guest house and build a new 30 roomed hotel. The new hotel was entirely built during the winter in order to be ready for the summer season. The investment was huge in respect with the size of the family business and wouldn't have been possible without the deferment of credit by the construction companies and the producers of intermediate goods. All the services and goods (the building's construction and the provision of furniture and frame) were provided by local artisans and small size companies.

The increased size of the hotel stimulated the Mulazzani's to adopt a relative more aggressive marketing strategy. During the second half of the sixties they advertised their hotel on a Dutch magazine and began to travel in the Netherlands and Germany during the winter. A very original marketing strategy was adopted for the Dutch clientele. In fact since the beginning of the seventies they took the habit of organizing a party in the Netherlands, at Nijmegen for their clientele (with Italian music and some catering). The local newspaper reported and commented the event in 1984<sup>24</sup>.

During the second half of the eighties, the hotel was handed over to the new generation of Mulazzani: after taking a hotel school certificate Ilio's daughter, Claudia, started to work in the hotel; the other son, Salvatore followed some years later. Since 1995 the two have been running the hotel, with the support of their parents.

Quite similar was the experience of the Calesini family (Armando, his wife Vanda and his brother Domenico), residents in Rimini, which entered the hotel industry in 1964, when they rented the Hotel Albion, a 30 roomed hotel located on the seafront<sup>25</sup>. The twenty-five year old Domenico was the only family member to have had a formal training in this field: after attending hotel school

he accumulated experience working in hotels all over Europe (in Germany, in Spain, in Luxemburg, and in Great Britain as hotel manager). On the other hand none of the other Calesini's had any hotel management experience: the wife was a shopkeeper and her husband a civil servant. They invested all their savings in the project, including profits from the sale of the shop to start their business and above all to pay the hotel rent in advance. At the beginning only one member of the family, Vanda, the wife, worked full time in the hotel, whereas the others kept their previous jobs until the profitability of hotel was solid. Each member of the family carried out a different function: Domenico welcomed the customers, allotted the rooms and oversaw catering operations, whereas Vanda was responsible for buying supplies, her mother for preparing food, and the others helped in different ways.

In 1965 the Calesini's rented a bigger hotel with 70 bedrooms, the Rosabianca, and took on 6 workers, all unskilled from Rimini. Typically they were housekeepers who accepted all types of duties (cleaning rooms, laundry, washing up, etc.). They worked more than 10 hours a day and were employed on a fixed wage.

The Calesini's did very little advertising apart from nurturing existing customers with Christmas or Easter cards included with the next Seasons' brochure. However they did keep in touch with a few foreign travel agencies (French, German and English ). Some of them were Domenico's contacts when he had worked abroad. Foreigners were a significant percentage of their customers.

1966 was an important turnaround in the family history as it had been for the Vanni Mulazzani's because the Calesini's bought a villa near the sea and converted it into a 35 roomed hotel, the Junior. The villa was renovated to medium quality hotel standard; each room had its own bathroom and televisions and telephones were widely introduced. The hotel's motto became: clean, comfortable and good cuisine. With the Hotel Junior opening, the Calesini's started to manage two hotels. In addition they also rented out rooms or flats very close to their hotels in order to accommodate the increasing number of customers. This kind of organisation allowed them to satisfy all different type of demand and customer budgets.

The increased capacity and the centralization of the many functions (industrial relations, buying, marketing, tax administration, etc.) represented an attempt to exploit economies of scale whereas the ties with the flat owners allowed to maintain a certain degree of flexibility and reduced the impact of possible crisis. The Calesini's strategy can be described with three concepts: economies of scale, flexibility in production level and diverse level of services.

In 1970 a new phase of expansion started. The Calesini's bought Villa Elena, an eleven room guest house, close to Hotel Junior and rented a 50 room Hotel (in charge of Vanda's sister had). The Calesini's managed one guest house, the hotel they owned and the two hotels they rented. During this period the support of the main local bank was very important because the profits accumulated over the previous years would not have been enough to finance growth.

In 1976 the Calesini's rationalized their activities. Villa Elena was annexed to Hotel Junior in order to create an higher quality standard hotel with 54 bedrooms, several meeting rooms inside (one bright dining room, one breakfast room, a large cocktail-room) and a nice garden outside. The hotel services were upgraded to cater for the new and more demanding customers of the time: each room had its own television and telephone, parking facilities were supplied, catering was greatly improved introducing an "a la carte" menu and a wide variety of cuisine (it was necessary to hire a chef) and various different rates were implemented (full board, half board, bed and breakfast, etc.). In 1981, they were among the first to computerize their hotel accounting. The rented hotels, that couldn't be renovated, were reserved for less demanding and lower budget customers. During the Seventy's it became increasingly difficult to employ Rimini residents and Calesini's went to southern Italy looking for staff as many others did. Rimini was no longer a poor and agricultural area whose inhabitants accepted any kind of job. Now it had become a rich town and its residents looked for stable employment and would not accept temporary jobs in the hotel industry.

At the beginning of nineties the Calesini's bought the 79 roomed Admiral hotel, located on the main street, and converted it into a four star hotel. Nowadays in total Calesini group has 42

employees (part of them only in summer) in addition to the family members, although it has maintained the family touch.

During the Nineties the new generation of Calesini entered the business: after accumulating experience in hotel management all over Europe, the eldest son became responsible for marketing, communication and the booking of the two hotels whilst the youngest son (after taking his degree in Economics) became responsible for the accounts and staff management. Vanda is still responsible for buying supplies and Armando for hotel provisions.

4. The influence of the growth in tourism on the construction industry and the development of associated industrial sectors.

During the period of growth, hundreds of new hotels and guest houses were opened, constituting an authentic “miracle of private enterprise”: from the 580 businesses existing in 1949, numbers had risen more than fivefold by 1961, with a grand total of 2,824 hotels and guest houses in the Rimini area. The construction industry did not even have time to register the fall in demand for houses (due to the termination of the programme of post-war reconstruction), as demand for the construction of hotels rocketed, driven on by the recovery of the tourism sector in general.

By the mid-1950s, the building boom had totally transformed the urban and seafront geography of the town, to the extent where developments were considered by some to constitute the “Americanisation” of the local landscape: “Rimini has been transformed into an American-style beach. This phenomenon is now common to this region, as we have seen, and constitutes a blend of so-called Emilian “materialism”, of the region’s love of all things technical, and a futuristic approach capable of absorbing new models”<sup>26</sup>.

In 1951, the construction industry was already one of the most important sectors of the local economy in the Rimini area; with approximately 11 workers per company and a total of over one thousand workers, it contributed enormously to reducing local unemployment. Employment in this sector, in fact, represented around 40% of total employment in all industrial sectors.<sup>27</sup> From the mid-1950s onwards, the construction industry was characterised by extreme dynamism: by 1961 the number of construction companies had almost doubled, while employment had risen by 134%; likewise the average number of workers per company (which had risen from 11 to 17). The construction sector and commerce were together capable of absorbing a good part of the excess, or underemployed, labour force resulting from natural and social increments and by the drop in requirements for agricultural labourers.<sup>28</sup> Thanks also to the construction industry’s flexibility, this sector played a fundamentally important role in absorbing the temporary workers leaving the tertiary sector after the summer. Indeed, the construction industry was to constitute a cornerstone of the local economy for nearly twenty years; in 1961 it accounted for almost 16% of the workforce, and in 1971, at the end of the vast tourist-residential building boom, it still employed some 12% of all workers.<sup>29</sup>

Demand coming from the tourist district played a vital role in fostering the development of all industrial sectors connected with the construction industry. Entrepreneurship of small local producers of brickworks, cement works, timber, furniture, clothing and shoes (just to mention a few) was spurred by a strong local demand and the decision to invest in the enlargement of production and modernization of the firm was often the result of this buoyant demand coming from the Riviera (as some case studies will show).

From the 1950s onwards, all energy of both a public and private nature was focused on investment in the building of residential and hotel structures: tax policy itself was geared towards facilitating tourist sector construction, with a reduction of 50% in the tax on those building materials employed in the construction of hotels and of the furniture used to furnish the same hotels.<sup>30</sup> The sustained expansion of the construction sector, together with the rapidly rising tourist demand, in turn induced growth in various other areas of manufacturing, and in particular in the engineering and timber industries.<sup>31</sup>

As can be seen from Table 6 below, in 1957 the major local employers were a heterogeneous group of companies, ranging from those closely linked to the construction industry (producers of cement, furniture, timber), to those associated with the manufacture of niche products (rosaries) or with local demand amplified by tourism (Ghini the pasta manufacturer was the largest employer in the Rimini area).

The sector producing machinery for working wood, although it emerged as a result of the demand from local furniture manufacturers, nevertheless expanded largely due to the growth in the external market. Local company Gemmani Nicoletti (later to become the SCM – Società Costruzione Macchine), which employed 110 workers in 1957 and was one of the largest companies in the Rimini area (see table 1), was to experience a much greater boom during the decades to follow. In 1952 the SCM group started producing small and low cost machines for working wood meant to supply local artisans and small firms that produced wooden products for the local market (construction and furniture firms). The building boom along the coast of Rimini was able to guarantee the success in sales of the new combined woodworking machine called “The Invincible”. In the 1960s the SCM invested in the industrial scale production of the new machine and by the end of the decade it had already expanded sales to the national and international market.<sup>32</sup>

For all the companies situated in the Rimini area, the advent of mass tourism was to constitute an important engine of growth which enabled the more successful of them to go beyond the confines of the local market and penetrate both the national and international markets. However, the demand induced by the expansion of tourism was to end up being a limit to the more solid growth of manufacturing industry.

## 6. The long-term growth of industry in the Rimini area

A close examination of census results provide an even clearer idea of the way in which industry in the Rimini area has in fact grown: while prior to the Second World War the manufacturing sector revolved around a number of small clothing and footwear manufacturers, after the war the building and tourism boom had significant positive effects on certain areas of manufacturing, such as the wood industry (furniture and furnishings), the working of non-metallic minerals (bricks and ceramics) and structural steel.

As Table 6 clearly shows, the most important and rapidly expanding sector was engineering, which at each census from 1927 to 1961 saw the doubling of the total number of employees, although there was then a period of stagnation between the 1961 and 1971 censuses. Once again, many service activities (such as mechanical repairs) or structural steel work derived from local demand induced by tourism or by the construction industry. This is shown by their rapid growth in the 1950s, the building boom years, and static presence thereafter, and by their small size (0-9 employees in the vast majority of cases) which confirms the strong connection with local demand.

Nevertheless, during this period an original nucleus of machine-tool manufacturers (specialised in the construction of woodworking machinery) emerged which, although receiving an initial impulse from the local market, very quickly became established in national and international markets.<sup>33</sup>

The wood sector saw little change in terms of employees between 1927 and 1951, although the 1950s witnessed the greatest period of growth in employment, with this sector being the second employer in both 1961 and 1971.

The number of workers employed in the non-metallic minerals sector also experienced its largest rise during the years of the economic boom, and in 1961, when this number reached its all-time high, these workers constituted 13.8% of the total manufacturing labour force, third behind the wood sector (19.5%) and engineering (27%).

In 1971, the fourth largest employer in terms of workers, and the second largest in terms of the number of local production units (602), was the clothing sector, which was characterised by extremely small-sized productive units (with an average work force of 2.5 workers). This sector is characterised by a certain static nature: while in 1927 it was of considerable importance in terms of total employees, it only saw a sudden rise in employment in the 1950s, with nearly 500 more workers being taken on at that time, whereas in the 1960s the number of workers levelled out at around 1,500. Its major weakness is the considerable degree of fragmentation, although during the 1960s the number of local units fell drastically while the workforce grew. It was during the 1970s, in fact, that this area of manufacturing became one of the most important in the Rimini area, with the development of three large companies (Aeffe, Gilmar and Fuzzi) capable of combining mass production with high product quality<sup>34</sup>. The success of the clothing-manufacturing sector was undoubtedly due largely to the bathing fashion of the time, as in the 1950s and 1960s there were still no competitors at the national level, while local manufacturers had a ready market along the Adriatic Riviera. Many business success stories began with an entrepreneur opening a boutique on the coast selling items to tourists (as was the case of Alberta Ferretti, whose business began with her mother's boutique in Cattolica: in a relatively short space of time, this dynamic young businesswoman had already founded the highly-successful AEFEE group).

The same can be said for the shoe sector and one of its most famous producer, Sergio Rossi. He recalls how his little artisan firm, located only a few kilometres from Rimini, started to grow after the war when "I had to produce the sandals during the winter to satisfy the growing demand coming in particular from the many German tourists who came to Rimini in the summer."<sup>35</sup>

The local food industry consists mainly of pasta manufacturers and flour mills, and the companies in question were mostly established enterprises prior to the onset of war: in fact, in 1927, they were the second most important employers in the area, and they maintained their importance over the following decades, in terms of both the number of workers and the size of the companies (with an average of 7.2 employees per company in 1961). Once again, in the 1960s the tourism boom was accompanied by significant growth in this sector as well, whereby the number of local producers rose from 189 to 214, while employment figures grew by 28% (from 1,377 to 1,781). Hotel demand played an important role in the growth local of food producers, especially pasta manufactures, which were able to satisfy the needs of a rapidly increasing market. In this case, the market remained local also in the following years, none of the producers proved capable of conquering important spaces at the national level and all had to face growing competition from big national business firms.

Thus the first twenty years after the end of the Second World War were positive ones for Rimini's manufacturing base: average company size began to increase, and nearly 6,000 new jobs were created. As we shall see in the following section, this figure is even more important bearing in mind that from the mid-1970s on, manufacturing industry began to offer a valid alternative to those workers who had become surplus to the requirements of the tourist and construction industries, by now in a phase of recession.

#### 7. The success of the manufacturing sector and its liberation from the seaside resort-based economy

During the 1970s, the construction industry-seaside model crisis (which had been particularly hard-hitting up until 1978, the year the first mega-discos opened) significantly affected those smaller manufacturing companies, linked to the building and tourist industries, with only the local market as a point of reference. In fact, the food manufacturers were the only ones to lose employees (- 298) during this period, whereas the furniture and woodwork machine-tool sectors were guaranteed growth by a much larger, more diversified market, and as such were only slightly affected by the local economic crisis. In the mid-1970s, the woodwork machine-tool manufacturers exported some 60-70% of their production, mainly to France, Germany, Eastern Europe, South and

North America.<sup>36</sup> The largest company (SCM) employed 69% of the sector's total workforce, and provided work to some 250 small companies.

During those years, the engineering companies remained the most important in terms of the number of both workers and local productive units: these companies, besides manufacturing woodworking machinery, also made steel, window and door frames and structural steel for the construction industry. They were to become the main employers in the manufacturing sector: in the space of ten years, their share of employment in manufacturing rose from 24% to 36%, and they made a significant contribution to softening the effects of falling employment in other areas of manufacturing. The clothing and footwear companies also performed well during this period, thanks to both local and international markets. The more dynamic companies were the best performers: that is, those who utilised to the full the significant local market in specialised workers, together with the most advanced forms of technology, and had opened up to the international market.

During the 1970s and 1980s, the industrial and handicrafts sector took off, so much so that the increase in wages in these two areas of manufacturing led to a reduction in the supply of workers to the seasonal tourist sector. Up to one-third of those jobs associated with the seaside trade, which Rimini's residents had left to go into manufacturing, were gradually taken up by workers coming into the area from economically weaker areas.(need stronger evidence to link them to tourism. More detail about nature of tourism would help here and also in section on tourism itself)

This period was to see the definitive separation of manufacturing and tourism as far as the transmission of the effects of a slump, whereas the role of the manufacturing sector as supplier of alternative employment options during moments of crisis in the seaside trade remained of considerable importance.<sup>37</sup>

In the period from 1978 to 1988, tourism recovered thanks to the increased number of Italian tourists and to the invention of the "entertainments area" (discotheques, gaming halls and pleasure-parks). However, at the end of the 1980s, the youthful, transgressive model of tourism began to show signs of decline, and in 1989 this decline precipitated as a result of the sudden appearance of masses of algae in the Adriatic: the public were so shocked by this latest development that presences fell by 35% in just one year, and holiday operators panicked as a result. The ensuing crisis was partly mitigated by the positive performance of the secondary and tertiary sectors, which managed to absorb those who lost their jobs as a result of the crisis in the tourist industry, and also managed to create a number of new jobs.<sup>38</sup>

In the 1990s, some of the characteristics that had emerged during the previous decade were indeed accentuated: for example, the engineering sector continued to expand, and with 661 productive units and 5,311 workers, it became the most important in the entire Rimini area, employing about one quarter of the total workforce.

The second largest employers (2583 workers) were those companies producing metal goods and working metal in general (from manufacturers of cisterns and tanks to engineering companies working for third parties). Once again, this is a highly fragmented sector, with only two companies employing more than 50 workers. Third place went to the textile and clothing manufacturers: again, fragmentation was clearly evident, and 90% of such enterprises were very small scale, with from 0 to 9 workers in all, although they provided jobs to 12.5% of all those employed in manufacturing.

## 8. The present outlook: few large companies in a small-sized world

In 2002, local manufacturing companies employed 25% of the entire employed workforce, and provided 16% of total value added, against the 26% provided by tourism.<sup>39</sup> Compared with 1995, this figure has changed little as far as industry is concerned, but has fallen from the previous figure of 31% in the case of tourism.

The leading companies, in terms of both profits and employees, are to be found in the engineering sector, the wood industry and the clothing industry. In the vast majority of cases, they

have strong ties with foreign markets, and four companies (Ferretti, FOM Industrie, Fratelli Zangheri and Fuzzi) export more than 90% of their production (see Table 7).

The largest company in terms of turnover and number of employees is SCM, leader in the production of woodworking machinery (a sector that also includes Masterwood and Casadei among the 29 local companies – making Rimini something of a hub for the production of this kind of machinery).<sup>40</sup>

Another engineering company, Ferretti S.p.A., has the second highest net revenue: this company, based in nearby Cattolica, is a market leader in the boat-building sector, and groups together a myriad of companies headed by the owner, Norberto Ferretti. Since 1998, the latter (both owner and manager of the company) has pursued a policy of buying up other concerns, including seven boatyards, one of which belonged to the Riva company: “An opportunity not to be passed up: we haven’t so much bought a boatyard as taken over a mythical figure of boat-building”.<sup>41</sup>

As far as the clothing sector is concerned, the top earners in terms of net revenue include three internationally-renowned groups (all based inland at San Giovanni in Marignano): Aeffe, Gilmar and Fuzzi. All three operate in the field of high-quality *prêt a porter*<sup>42</sup> fashion, and they were all three created by successful businesswomen: AEFPE was set up by Alberta Ferretti, the GILMAR Group by Giuliana Marchini (the Group’s brand names include Gerani, Iceberg, Victor Alfaro and Christian Lacroix), and the FUZZI Group by Anna Maria Fuzzi (brand names – Joop, Hugo Boss). As well as these famous names, Rimini also boasts a great many medium and small companies (approximately 700) which together employ some 3,000 workers. The average company, according to the latest ISTAT figures, employs eight workers.

Fourth place, in terms of turnover, goes to the footwear manufacturers Valleverde, set up in Coriano by the present owner and director, Armando Arcangeli. In 1979, Arcangeli launched his small company (with 35 workers, a turnover of 10 billion lire and an annual production of 100,000 pairs of shoes) onto the Italian market, investing the considerable sum of 600 million lire in TV advertising at that time. This advertising was to mark a turning point for the small local company: this “extraordinary vehicle of knowledge”, as Arcangeli called it, marked the beginning of an incredible success story. Today, Valleverde is among the leading companies in the province of Rimini, in terms of both turnover and workforce, and it currently produces more than one million pairs of shoes a season, 12% of its production being exported abroad.

In the wood and furniture sector, the most important companies are Industrie Valentini and the “Zangheri Brothers” (Fratelli Zangheri). The former company, founded in 1959 by Luigi Valentini (current company chairman and head of the board), is the number one Italian manufacturer of ready-to-assemble “kit” furniture. The Kit Division began operations in 1982, and was immediately successful in the Italian market. Today, 85% of the production of Industrie Valentini is designed for the domestic market, while 15% is for export. The ninth highest earner (with net revenue of 50,827 million euro) of all the companies based in the Rimini area, Industrie Valentini employs a total of 283 workers.

Finally, it should be pointed out that those manufacturers with a turnover in excess of 5 million euro and more than 30 workers are mainly based inland. In fact, the local economy is driven not only by Rimini’s manufacturing companies, but also by a series of firms based in the neighbouring boroughs of San Giovanni in Marignano, Coriano and Santarcangelo. Far from the beach, they have built their success on their manufacturing acumen, making the most of the local craft traditions and the surrounding entrepreneurial “fabric”.

The large employers among the province of Rimini’s manufacturers number about ten (over 250 employees), whereas there are just over a hundred medium-sized employers (113 to be exact). The rest, which together constitute the framework of Rimini’s manufacturing base, are all small family-run companies (accounting for 99.7% of local productive units). Moreover, the very small companies (those with between 1 and 49 workers) employ 84% of all manufacturing workers in the Rimini area.<sup>43</sup>

The characteristic form of the family-run business, as confirmed by the articles of association of Rimini's companies, was initially that of a simple limited partnership, whereby capital stock was sub-divided between the founder and his/her family members, or between the founder members and their respective family members. During the 1990s, there was a generalised move towards the creation of S.p.A.s (public limited companies), although this was substantially a formal transformation, given that company shares and managerial positions remained firmly in the hands of shareholders and their families. Indeed, Rimini's companies employ very few executives and middle-managers (1.5% and 0.8% of total employees, respectively)<sup>44</sup>, as management functions are carried out by the owner-director in the vast majority of cases.

## 9. Conclusions

In conclusion, two aspects of the development of tourism in Rimini stand out from the rest: the first is that tourism has proven it can represent an original path to industrialisation; the second is that both tourism and industry are based on small businesses rather than large corporations, and nowadays both these sectors contribute towards the town's welfare.

As far as the first of these two aspects is concerned, there have been at least two channels by which the tourist industry has facilitated economic growth and the above-mentioned process of industrialisation in the province of Rimini: the creation of an entrepreneurial class and the increase in the demand for intermediate goods.

Rimini's early entrepreneurs emerged in the tourism sector: hotel management represented an opportunity to transform a series of skills and know-how, together with the ability to relate to other people - which is part and parcel of urban living - into entrepreneurial "talent". Hence we can identify two factors which are indispensable if tourism is to become a hotbed of entrepreneurs: the existence of an urban setting, and the adoption of a model of tourism centred around hotels rather than holiday homes.

The second channel was that of increasing demand for intermediate goods, as we have said: in fact, tourist demand did not only focus on those instrumental goods required as a result of the building boom, but also on those companies producing consumer goods purchased directly by holidaymakers. The connected tourism and construction boom of the 1950s has helped many of Rimini's companies to develop and eventually become successful; however, subsequent expansion mainly depended on the capacity to penetrate the domestic and international markets.

Thus we come to the second aspect - that of the shape companies took during this rather unique process of industrialisation. In both the tourism and the manufacturing sectors, the province of Rimini has seen growth based upon a network of small companies which have seldom made that quantitative leap towards becoming medium or large enterprises. For example, in the manufacturing sector, only 123 companies out of a total of 32,000 have done so (according to the 2001 Industrial Census figures).

The high degree of fragmentation of local industry has not in itself been a limit to growth, given that it has guaranteed both the competitive capacity of tourism and the international success of part of local industrial production.

As far as tourism is concerned, the main advantage has been the great wealth of business talent that has emerged not only in the setting up of a considerable number of hotel businesses, but also in the presence of many other activities, such as trade fairs and amusement parks. Business talents in all entrepreneurial sectors were shaped by the industrial atmosphere of the district and the so called "social capital" which represent a well known ingredient in the success stories of the entire region.<sup>45</sup>

It is this wealth of business activity that represents the way forward for Rimini after a period of stagnation. In fact, in the case of both the entertainment district and conference tourism, the re-orientation of the tourism model has been based on the development of pre-existing activities that have not been exploited to the full in the past.

With regard to the industrial sector, the main advantage has been the spread of product diversification, rooted in the urban craftsmanship of the first half of the 20<sup>th</sup> century. Undoubtedly, this operative flexibility proved a winner in the end, as it enabled local companies to avoid the rigidity of large companies, to overcome large-scale international crises and to meet an increasingly differentiated, customised demand. The myriad of small companies dotted around the Rimini area were thus based on a number of “winning” elements from the word go: the customisation of products, individual flair and creativity, the flexibility of the productive process, and the widespread phenomenon of working on behalf of third parties (present in all sectors, from engineering to clothing and footwear).

However, there are clear limitations to this organisational model. In the case of tourism, the main limit has been the slow pace at which hotels have been renovated (it takes much longer for 1,500 small and medium-sized businesses to accept the fact that it is time to renew their structures than it does for 4 or 5 large businesses). The second limit concerns the difficulty in constructing a standardised image of the Rimini tourist offer and of its marketing, given the vast number of small businesses operating locally. However, this limit can be overcome by means of the creation of specialised companies who perform this function on behalf of the entire business network.

Manufacturing industry is experiencing a similar problem, as the road to innovation is only being taken by the relatively few larger companies. Investments in innovative areas and expenditure on research and development are generally the prerogative of those companies employing more than 200 workers.<sup>46</sup> Generally speaking, the investment strategy of local manufacturing companies focuses on the replacement of obsolete machinery or the expansion of productive capacity, and there appears to be little interest in innovative activities, which may be partly explained by the fact that small companies find it extremely difficult to invest in costly research and development. Once again, the solution to this problem could be the setting up of R&D networks based on cooperation and on risk-sharing: in theory, the sharing of resources would enable such companies to deal with the cost of R&D and training, and thus maintain their competitive edge. However, consortia or associations of small companies still appear to be far removed from what is actually happening locally.

The leading question thus remains: can an economic structure dominated by small companies continue to be competitive in the manufacturing and tourism sectors? The optimistic view perceives small companies as performing better and exploiting their flexibility to the full, compared with the more static performance of large companies which respond slowly to change. A more pessimistic view, on the other hand, derives from the numerous takeovers of Italian companies by foreign concerns, and from the growing competition in the “mature” sectors – the principal domain of the small companies – coming from Asia and Eastern Europe. Moreover, there is also the risk that the immobility of the small company makes the natural process of generational turnover, which many family-run companies in Rimini have encountered or are about to encounter, particularly difficult and risky. In many cases, the future is inevitably going to see more takeovers by outside concerns, in what could be described as a form of colonisation of the local area resulting from a lack of new entrepreneurial energies, of the capacity to continue running the family business, and of any propensity towards innovation.

Some people believe that the real strength of local productive systems has always been the capacity to evolve and change<sup>47</sup>, and thus it is difficult to forecast what is going to happen in the future. From an analysis of their past, we can certainly say that these systems have been anything but static; on the contrary, they have constantly evolved, and for this very reason, they may well constitute the answer to the competitive challenges thrown up at the beginning of the new millennium.

Table 1 Tourists number and holiday accommodation in Rimini: 1854 - 2003

	Arrivals in Rimini	Hotels and guest-houses in Rimini	Arrivals in the province of Rimini (only the 5 coastal towns)	Hotels and guest houses in the province of Rimini (only the 5 coastal towns)
1854	354	0	354	0
1882	1600	3	1600	3
1902	-	5	-	6
1913	-	14	-	-
1923	20901	36	-	-
1933	74953	94	115556	205
1939	56456	137	91126	-
1949-52	49000	212	94000	477
1963	376215	1377	794250	2859
1976	521383	1625	1065910	3300
1991	1128973	1502	2138512	3033
2000	1414000	1329	2591000	2591
2003	1424982	1193	2677068	2390

Source: Province of Rimini, Osservatorio sul turismo. Report 2003; P.Battilani, "Ascesa, crisi e riorientamento del turismo" ed. Vera Zamagni, *Sviluppo economico e trasformazione sociale a Rimini nel secondo Novecento* (Rimini, 2002)

Table 2 People running a hotel in Rimini and their marital status: 1928 - 1938

	Number	% of total owners	% married
Male owners	56	42.7%	88%
Female owners	75	53.7 %	93%
Total	131	100%	91%

Source: our elaboration of figures from the Forlì Chamber of Commerce archives and from the Rimini Town Registry Office.

Table 3 Professional status during the previous five years of people running a hotel, years 1926-1938.

Profession	Men	Women	Total
Landowner	11%	1%	5%
Farmer	5%	3%	4%
<b>Total From agriculture</b>	<b>16%</b>	<b>4%</b>	<b>9%</b>
Railway worker	4%	0%	1.5%
Teacher	0%	3%	1.5%
Small trader or craftsman	32%	3%	15%
Private sector employee	18%	1%	8%
<b>Total from urban middle classes</b>	<b>54%</b>	<b>7%</b>	<b>26%</b>
<b>Housewife</b>	<b>0%</b>	<b>84%</b>	<b>48%</b>
<b>Salaried worker</b>	<b>7%</b>	<b>0%</b>	<b>3%</b>
<b>Hotelier</b>	<b>23%</b>	<b>5%</b>	<b>13%</b>
Total	100% (56)	100% (75)	100% (131)

Source: see Table 2

Table 4 Professional status during the previous five years of spouses of people running hotels, years 1926-1938

Profession	Husbands	Wives	Total
Landowner	4%	4%	4%
Farmer	12%	4%	8%
<b>Total from agriculture</b>	<b>16%</b>	<b>8%</b>	<b>12%</b>
Housewife	0%	80%	48%
Railway worker	35%	0%	20%
Teacher	6%	2%	4%
Small trader or craftsman	17%	4%	12%
Private sector employee	3%	2%	3%
<b>Total from urban middle classes</b>	<b>61%</b>	<b>88%</b>	<b>87%</b>
<b>Salaried worker</b>	<b>10%</b>	<b>0%</b>	<b>6%</b>
<b>Hotelier</b>	<b>6%</b>	<b>4%</b>	<b>5%</b>
Other	7%	0%	4%
Total	100% (69)	100% (49)	100% (118)

Source: see Table 2

Table 5 The principal employers in the Rimini area in 1957

Company	BUSINESS ACTIVITY	EMPLOYEES
Ghigi F.lli – Morciano (1)	Pasta factory	240
Marchino Unione Cementi - Santarcangelo (1)	Cement factory	200
Lauretana - Cusercoli (Civitella) (1)	Rosaries	183
Olivieri Gregorio – Rimini (1)	Furniture maker	150
Ago Magico - Rimini (1)	Knitting-machine manufacturer	120
Gemmani e Nicoletti (SCM) – Rimini (1)	Woodworking machines	110
FISI - Santarcangelo di Romagna (1)	Paper bags	95
Galanti F.lli - Mondaino	Accordions	85
“Ripa Bianca” Santarcangelo (1)	Brickworks	70
Bigucci F.lli – Riccione (1)	Shoes	70
SA.R.I.L.A. – Rimini (1)	Wooden furniture	60
Calza e Manzi – Riccione (1)	Furniture	60
Casadei Giovanni – Rimini (1)	Woodworking machines	52
Pritelli Giuseppe – Cattolica (1)	Furniture	50
D’Agostini Giovanni - Santarcangelo	Hemp spinning	45
Scalificio riminese – Rimini (1)	Ladders	40

(1) New plants or ones that had been re-modernised between 1952 and 1957

Source: CCIA Forlì, *Indici della vita economica della provincia di Forlì*.

Table 6 Workers employed in manufacturing industry in the Rimini area 1927-1971

Workers	1927	1951	1961	1971
Engineering	677	1208	3096	3002
Wood, furniture	655	925	2225	2575
Foodstuffs and associated products	684	1186	1377	1781
Footwear and clothing	1071	1045	1519	1551
Non-metallic minerals	623	901	1587	1224
Textiles	238	555	602	705
Paper, printing, photography and publishing	115	201	615	649
Rubber and plastic manufactured goods	0	22	41	223
Skins and leather	23	28	97	204
Chemicals	60	70	132	86
Miscellaneous	6	176	103	290
TOTAL	4152	6317	11394	12290

Source: ISTAT, Censuses

Table 7 The top twenty companies in the province of Rimini in 2002 (manufacturing industry)

COMPANY	Head office	Net Revenue (thousands of euro)	Employees	Exports as a % of total sales
1. S C M GROUP SPA	Rimini	445521	2993	68,3
2. FERRETTI SPA	Cattolica	331191	1120	91,1
3. AEF FE SPA	San Giovanni in Marignano	242179	1221	68,5
4. CALZ. VALLEVERDE SPA	Coriano	145975	355	11,6
5. GILMAR DIVISIONE INDUSTRIA SPA	San Giovanni in Marignano	90792	435	68,6
6. FUZZI SPA	San Giovanni in Marignano	67647	172	93,0
7. CERAMICA DEL CONCA SPA	San Clemente	66784	193	36,7
8. AETNA GROUP SPA	Verrucchio	59559	324	51,0
9. INDUSTRIE VALENTINI SPA	Rimini	50827	283	15,1
10. MAGGIOLI SPA	Rimini	37284	316	
11. FINCOLOR GROUP SPA	Riccione	33625	253	
12. MASTERWOOD SPA	Rimini	31060	182	72,5
13. SCRIGNO SRL	Santarcangelo	30293	75	13,7
14. FOCCHI SPA	Rimini	30037	162	45,8
15. ALBINI & FONTANOT SPA	Rimini	27189	133	38,3
16. FOM INDUSTRIE SRL	Misano	25783	203	100,0
17. NEW FACTOR SPA	Coriano	25151	45	26,9
18. COMECA SPA	Marciano	19564	137	15,9
19. MEC 3 SRL	San Clemente	17628	76	31,8
20. CASADEI GIANFRANCO SPA	Verrucchio	14753	114	71,0

Source: G. Martinese, *Territorio, società ed economia: le principali società del riminese, potenzialità e limiti di sviluppo nella nuova fase di competizione socio-economica* (Rimini, 2004).



## <sup>1</sup>NOTES

See: Jacint Balaguer and Manuel Cantavella – Jorda, “Tourism as a long-run economic growth factor: the Spanish case” in *Applied economics* 34 (2002): 877-884; B.R Hazari and A. Ng, “An Analysis of tourists’ consumption of non-traded goods and services on the welfare of the domestic consumers” *International Review of economics and Finance* 2 (1993), 3-58; Hazari B.R. and Sgro, P.M., “Tourism and growth in a dynamic model of trade” *The Journal of International Trade and Economic Development* 4 (1995), 253-6.

<sup>2</sup> Between 1860 and 1900 some 62 papers came out (20 of them focusing on tourism). See Attilio Gardini, Giorgio Gattei and Giorgio Porisini, *Storia di Rimini dal 1800 ai nostri giorni vol.IV* (Rimini, 1977).

<sup>3</sup> Giacomo Becattini, “Il distretto industriale marshalliano come concetto socio-economico”, *Studi e informazioni, Quaderni* 34 (1991), pp. 51–66; Becattini, G. *Mercato e forze locali: Il distretto industriale* (Bologna 1987); Other essays on this issue are Carlo Trigilia, *Grandi partiti e piccole imprese. Comunisti e democristiani nelle regioni a economia diffusa* (Bologna, 1986); Sebastiano Brusco, “The Emilian Model: Decentralization and social Integration” *Cambridge Journal of Economics* 2 (1982); G. Becattini, *Il distretto industriale* (Torino 2000); M. Bellandi, G Becattini, G. dei Ottani, Fabio Sforzi, *From industrial districts to local developments* (Northampton, 2003).

<sup>4</sup> See Patrizia Battilani, “Rimini and Costa Smeralda: How Social Values Shape Recreational Sites”, in *Water Leisure and Culture*, S.C. Anderson and B. Tabb eds (Oxford 2002).

<sup>5</sup> F Silari, “I bagni ed altro. L’evoluzione dell’industria e dei servizi nel riminese dalla metà dell’Ottocento alla fine del Novecento” in *Economia e società a Rimini tra ‘800 e ‘900*, Alessandro Varni and Vera Zamagni eds. (Rimini 1992).

<sup>6</sup> Rimini has dedicated a study foundation to Federico Fellini, which houses the director’s personal library as well as a remarkable number of drawings of the director himself. His films draw inspiration from the places where he lived: Rimini (in *I vitelloni* and *Amarcord*) and Rome. Federico Fellini, which has always kept close links to Rimini, rests in the tomb that Arnaldo Pomodoro designed for him and his wife, Giulietta Masina, (the bow of a boat pointing towards heaven that recalls the legendary Rex in *Amarcord*) at the entrance to the Rimini’s cemetery

<sup>7</sup> A. Corbin, *Le territoire du vide: l’Occident et le desir du rivage 1750-1840* (Paris, 1988).

<sup>8</sup> See Giangi, Cronaca, II, from the 1<sup>st</sup> September 1823, reported in *Storia di Rimini dal 1800 ai nostri giorni, vol. VI*, 11.

<sup>9</sup> Maria Lucia De Nicolò, *La strada e il mare* (La Pieve, 1993), 304-305.

<sup>10</sup> We know, for example, that the Rimini bathing establishment in 1843 had cost 2000 Roman scudo, while the one at Porto Corsini (Ravenna) in 1872, cost 10600 lire (the equivalent of about €35,000 today).

<sup>11</sup> See Patrizia Battilani, “Rimini: a Mass Tourism Resort which based its Success on an Original Mix of Italian Style and Foreign Models”, in L. Segreto and C. Manera, *Europe at the Seaside. The Economic History of Mass Tourism in the Mediterranean Sea (1945-2000)*, Proceeding Balearic Islands, 21<sup>st</sup>-23<sup>th</sup> february 2003, forthcoming.

<sup>12</sup> Ebenezer Howard, *Garden cities of to-morrow* (London, 1965).

<sup>13</sup> In 1961, foreigners represented 32% of tourist presences, the majority of whom were Germans, followed by the English (17%), the Swiss (5%) and the French (4%). See: M. Cammiati, “Il flusso turistico” *Bollettino Mensile* 8 (February 1962), 41.

<sup>14</sup> M. Cammiati, “Il turismo fonte di benessere nazionale” (Tourism as a source of national well-being) *Bollettino Mensile*, 2 (February 1962), 30.

<sup>15</sup> See Battilani, “Rimini: a Mass Tourism Resort.

<sup>16</sup> We would very much like to thank Nicola Perazzini for the archive work in question and for having given us the opportunity to use this important database.

<sup>17</sup> Silari, *I bagni ed altro* PAGINA

<sup>18</sup> “Il problema alberghiero” *Il Popolo di Romagna* (August 23<sup>rd</sup> 1925).

<sup>19</sup> “Le forze del fascismo riminese si sono affermate, convegno circondariale di Santarcangelo (Rimini’s Fascist forces make themselves known, local conference in Santarcangelo) , *Il Popolo di Romagna* (August 9th 1925).

<sup>20</sup> A summary of an article that appeared in the *Corriere dei Bagni* (August 30<sup>th</sup> 1923).

<sup>21</sup> Becattini, *Mercato e forze locali*

<sup>22</sup> “Corsi di addestramento per lavoratori di alberghi” (Training courses for hotel staff) *Il Popolo di Romagna* (March 4th 1939). This course was organised in conjunction with the Bertola Professional Training School in Rimini. See “Una scuola Alberghiera” (A Hotel and Catering College), *Il Popolo di Romagna* (Novembre 20th 1937); “L’apertura del corso di specializzazione alberghiera” (The setting up of the advanced hotel and catering course) *Il Popolo di Romagna* (December 4th 1937).

<sup>23</sup> This business history has been reconstructed by interviewing various members of the Mulazzani family (Ilio, his wife and his daughter Claudia) on December 20<sup>th</sup> 2004.

<sup>24</sup> “Italiaanse recinie in Goffenthal”, in *Dagblad voor Nijmegen-stad*, January 28th 1984.

<sup>25</sup> This business history has been reconstructed through the interviews of Carmela Pasquini to various members of the Calesini family (Vanda, Armando and their sons) in winter 2003.

<sup>26</sup> Guido Piovene, *Viaggio in Italia* (Milan, 1957).

<sup>27</sup> Attilio Gardini, “Crescita e ristagno di una economia turistica balneare (1944-1977)”, in *Storia di Rimini dal 1800 ai nostri giorni vol.II Lo sviluppo economico e sociale*, Attilio Gardini, Giorgio Gattei and Giorgio Porisini eds. (Rimini, 1977), 190.

<sup>28</sup> This class of building-company entrepreneurs and master masons mainly consisted of persons from a rural background.

<sup>29</sup> Carla Catolfi Ferri, “Geografia urbana e sociale di Rimini”, *Storie e storia*, 7 (April 1982), 69-70.

<sup>30</sup> Attilio Gardini, “L’economia. Lo sviluppo capitalistico (1943-1981)”, in *Storia illustrata di Rimini*, P. Meldini and A. Turchini eds. (Milan, 1991), 513.

<sup>31</sup> Attilio Gardini and Stefano Dall’Aglio, *Un’analisi input-output per il circondario di Rimini* (Forlì, 1985), 99.

<sup>32</sup> Francesca Fauri, “Dal turismo all’industria” in ed. Vera Zamagni, *Sviluppo economico e trasformazione sociale a Rimini nel secondo Novecento* (Rimini, 2002), 179

<sup>33</sup> CCIA, Ufficio Provinciale di Statistica di Forlì (Forlì Provincial Statistics Office), *Indici della vita economica della Provincia di Forlì, 1952-57* (Forlì 1959), together with the CCIA Library publication, *Caratteristiche economiche della provincia di Forlì* (typed manuscript).

<sup>34</sup> ERVET, *Note economiche semestrali. Il circondario di Rimini. Aspetti e tendenze della realtà economica e sociale* (Bologna, 1977), 69.

<sup>35</sup> Interview with Sergio Rossi by Fauri in 1996.

<sup>36</sup> ERVET, *Note economiche*, 122.

<sup>37</sup> Associazione Industriali Rimini, Osservatorio Economico, *Pubblico e privato nell’economia riminese: l’industria chiede di decollare* (Rimini, undated), 20-22.

<sup>38</sup> Observations regarding labour market trends in the Rimini area to be found in the annual report of the Rimini District – *Rapporto Annuale 1989* (December 1989), 44.

<sup>39</sup> CCIA Rimini, *Rapporto sull’economia della provincia di Rimini* (Rimini, 2000), 80.

<sup>40</sup> “Macchine per il legno”, an article that appeared in the financial paper *Il Sole 24 Ore* on the 29<sup>th</sup> June 1998.

<sup>41</sup> In June 2000, thanks to Schroeder joining the company and bringing with him the necessary financial know-how, Ferretti S.p.A. was quoted on the stock exchange, and it ended the financial year 2000 with over 500 billion lire of consolidated revenue (against a figure of 238 billion in 1999). Interview with Norberto Ferretti in the financial paper *Il Sole 24 Ore*, 8<sup>th</sup> October 2001.

<sup>42</sup> *Prêt a porter* differs from traditional high fashion in that a number of examples of each model are produced and made available to a wider clientele than the rather restricted elite of high fashion buyers.

<sup>43</sup> My elaboration of ISTAT 2001 Census figures.

<sup>44</sup> Walter Martinese, *Osservatorio Bilanci delle aziende private e pubbliche della provincia di Rimini*, (Rimini, 2002), 6.

<sup>45</sup> Brusca-Trigilia, eds., *Il capitale sociale*, (Bologna, 2005).

<sup>46</sup> CCIA Forlì study contained in the report entitled *Rapporto sull'economia della provincia di Forlì-Cesena*, 1999.

<sup>47</sup> Nicola Bellini, "I distretti: un modello in evoluzione" *Il Sole 24 Ore*, 26 June 2000.

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