

BARSERVICE

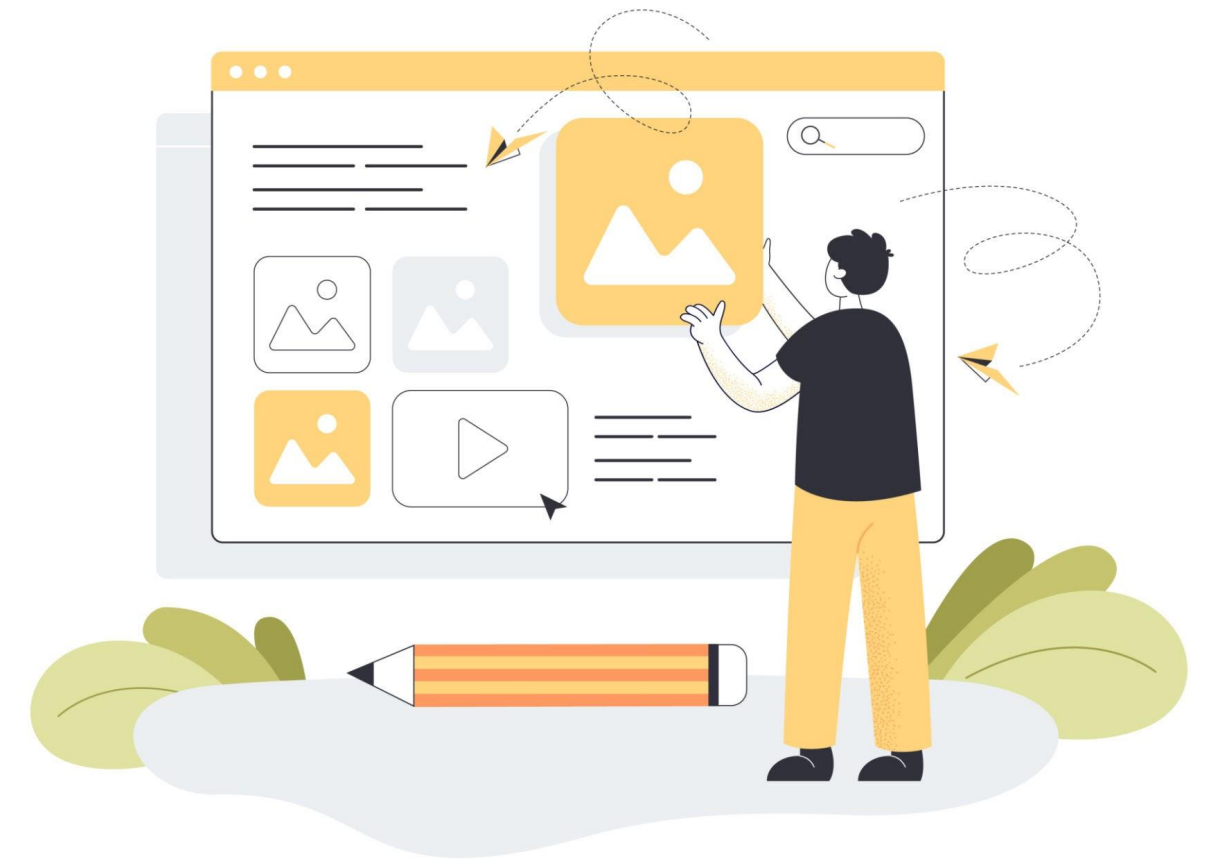


Funded by
the European Union



Collective bargaining in Europe's publishing sector: Mutual learning event

5 June 2025



We have interpretation available!

Romanian, Czech/Slovak, Turkish, Croatian

Click on the “Globe” icon at the bottom of your screen and choose your language.



Please use a headset with a built-in microphone or an external microphone when you're speaking and speak slow!



BARSERVICE

Agenda

1

Comparative findings

across 9 countries

Stan De Spiegelaere –

UNI Europa

2

Insight into country experiences

- Czechia – Simona Brunnerová (CELSI)
- Türkiye – Ceyhun Güler (DEU)
- Serbia – Galjina Ognjanov (University of Belgrade)

3

Discussion

- Jana Krstevska, MK 2025 – North Macedonia
- Daniel Fernandez, UNI Europa

BARSERVICE

BARSERVICE

Comparative report
Publishing Sector

Stan De Spiegelaere
UNI Europa



Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union. Neither the European Union nor the granting authority can be held responsible for them. The project is funded by the European union, project No. 101126532

Publishing sector



Publishing sector

Small sector, declining employment

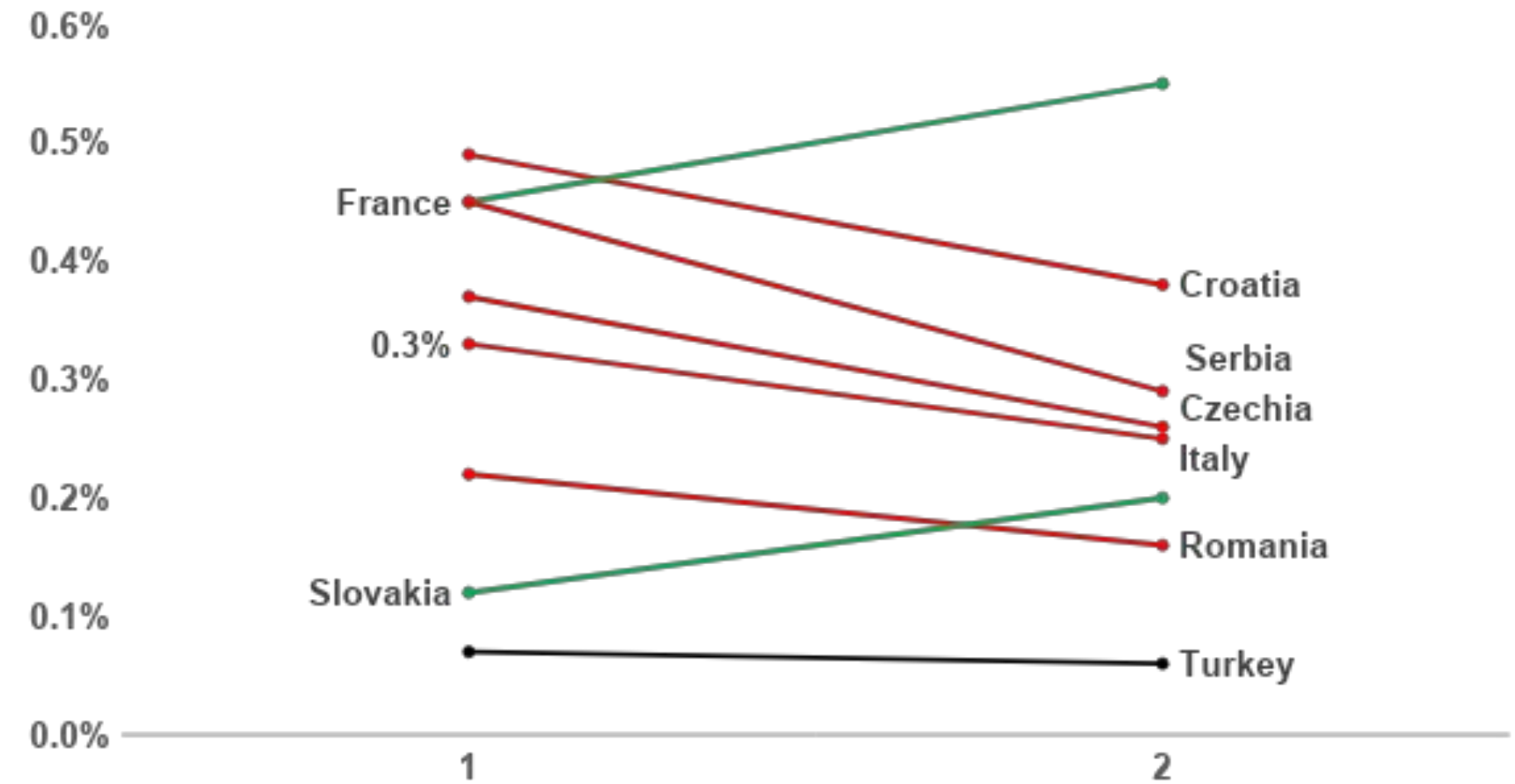
Challenges

- **Customers:** changing consumer habits
- **Companies:** digital transition & automation
- **Clients:** decreasing advertisement income
- **Workers:** changing skills
- **Policy:** privatization
- **Environment:** push for sustainability

But also:

- Packaging printing growing
- Risk of **oligopoly**
- Still presence of **public institutions**

Publishing sector employment (as % of total)



Collective bargaining – challenges and solutions (?)

Challenges

- Digital disruption
- Atypical employment
- Lack of interest and capacity of employers
- Lack of union capacity
- Lack of culture
- Decentralized bargaining

Countries

- All
- CZ, MK, SB, FR, RO
- MK, RO, SK, HR, IT, SE
- MK, SB, SK, TR, RO, CZ
- CZ, RO
- HR, SK, MK, TR, CZ, RO

Smart solutions

- ...
- Integrating freelancers, reduce bogus self-employment
- Good faith bargaining rules, incentives
- Capacity building, training, organize freelancer
- Create awareness and trust
- Sectoral bargaining

EU level?

- **Minimum wage directive**
 - Italy & France: > 80% => little effect
 - Czechia, Romania & Slovakia: < 80%
 - CZ: no impact yet
 - RO: legal change
 - SK: expected
 - Macedonia, Turkey & Serbia
-
- **But also: international cooperation**
 - **And also: 2022 guidelines on collective bargaining of solo self-employed**



Conclusions

- Building institutions
- Building actors
- Building a house during a storm



BARSERVICE



Central European
Labour Studies
Institute

Towards smart bargaining in publishing: Czechia

Mutual learning event

Publishing sector

5 June 2025

Presented by

Simona Brunnerová

Key figures

10,620 

The Czech publishing sector employs approximately 10.62 thousand people in the information sector,

€1.6 billion

In 2022, the market was valued at approximately €1.6 billion. While that might not compare with larger EU countries, it is significant for a country of this size.

Only 12%

of the market is controlled by the top five publishing houses — such as Albatros Media and Euromedia Group. The rest is spread thinly across more than 6,000 mostly small and micro-enterprises.

Bargaining characteristics

1

Collective bargaining largely absent
only a few large or state-affiliated institutions like the National Library or Czech Television have functioning collective agreements.

2

The prevalence of individual contracts significantly shapes the dynamics of labour relations in this sector

3

Despite the absence of traditional collective bargaining, there have been some initiatives that resemble collective advocacy

4

An important actor in the sector is the Association of Czech Booksellers and Publishers

while not a labour union, the association engages in advocacy that benefits the entire industry, including its workforce.

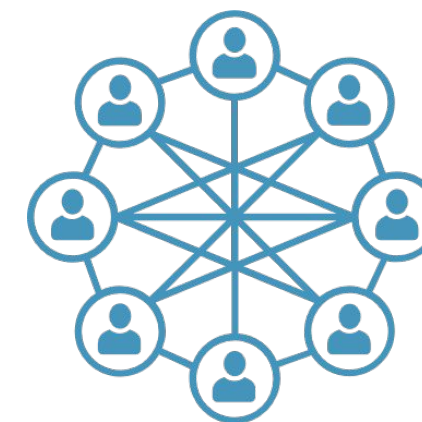
Challenges to bargaining



No structured
social dialogue

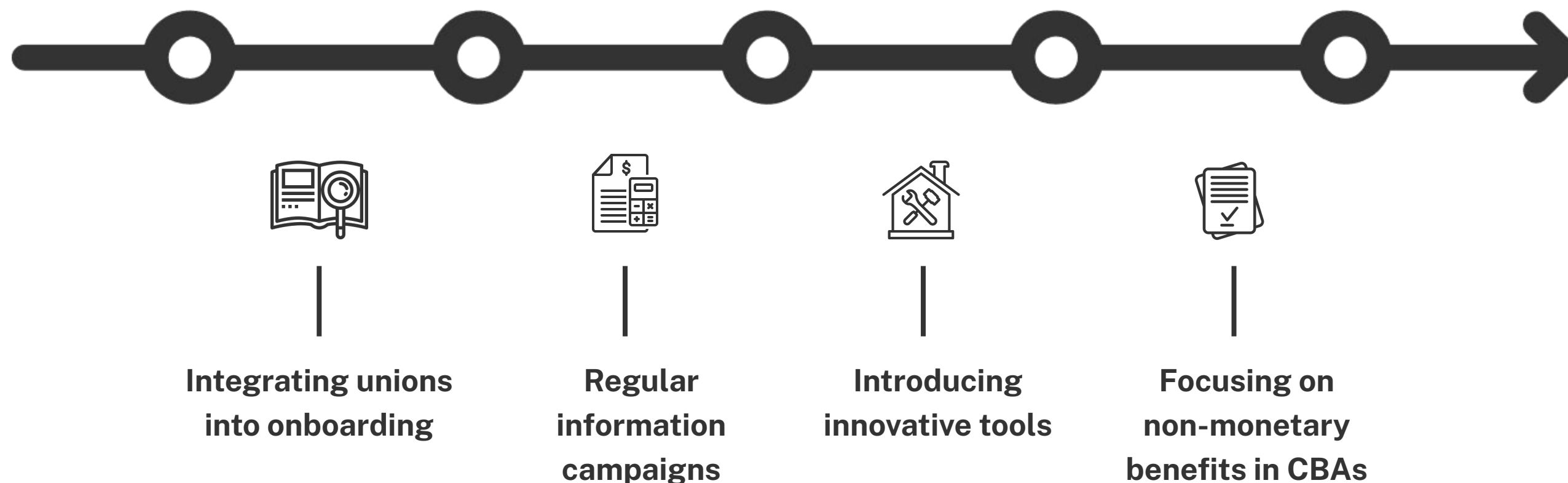


Digital
transformation



High
decentralization

Towards smart bargaining



BARSERVICE



Central European
Labour Studies
Institute

Thank you
for your attention

simona.brunnerova@celsi.sk

www.celsi.sk/en/barservice

Transforming Collective Bargaining in Türkiye's Publishing Sector

BARSERVICE

CELSI  UNI  europa    IRMG   WageIndicator



Key Industry Statistics

9.2%

Publication Decline

Decrease in newspapers and magazines

8.3%

Circulation Drop

Reduction in total annual circulation

13.3%

Book Sales Fall

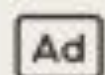
Decrease in book band sales

13,246

E-Books Published

Web-based electronic books released

Sector Overview: Publishing in Türkiye



Digital Transformation

Traditional print media circulation has declined significantly as newspapers and magazines increasingly shift to digital platforms



Changing Consumer Habits

Readers are increasingly consuming content through digital channels, forcing publishers to adapt their business models

Economic Pressures

Declining print production and sales highlight the need for structural changes in the publishing industry



Unionization: Current State

96,711

Total Workers

Total number of workers in the publishing sector (2025), decreased by 3,000 from 2023

12,600

Union Members

Number of unionized workers in the sector (2025)

13%

Unionization Rate

Percentage of workers who are union members, showing limited coverage

BARSERVICE

CEIS                                                           



Public vs. Private Sector Unionization

- Private Sector
91,915 workers
- Only 7% unionized
 - Vast majority of sector workforce
- Male Workers
65.41% of workforce
- 73% of union members
 - Overrepresented in unions



- Public Sector
4,799 workers
- 83% unionization rate
 - Small portion of total workforce
- Women Workers
32.36% of workforce
- 27% of union members
 - Underrepresented in unions

Workers Covered by Collective Agreements



Significant Growth

The number of workers covered by collective agreements has increased from 707 in 2013 to 2,208 in 2023, representing a 212% growth.

Public vs. Private Sector

Of the 2,208 workers covered, 451 are in the public sector and 1,757 in the private sector, with 1,697 (77%) being union members.

Limited Overall Coverage

Despite improvements, collective agreements still only cover a small percentage of the total workforce in the publishing sector.

Key Challenges to Collective Bargaining



Smart Collective Bargaining Approach

Inclusive Coverage
Extend protections to freelancers
and digital media workers

Gender Equality
Combat wage gaps and
discrimination in promotions



Digital Integration

Address remote work, digital tools,
and data security

Work-Life Balance

Manage workloads and support
creative processes

**An approach beyond
wage bargaining**

The development of an inclusive
bargaining language on social rights and
working conditions

BARSERVICE

CESR                                                       



BARSERVICE



Thank you for your attention

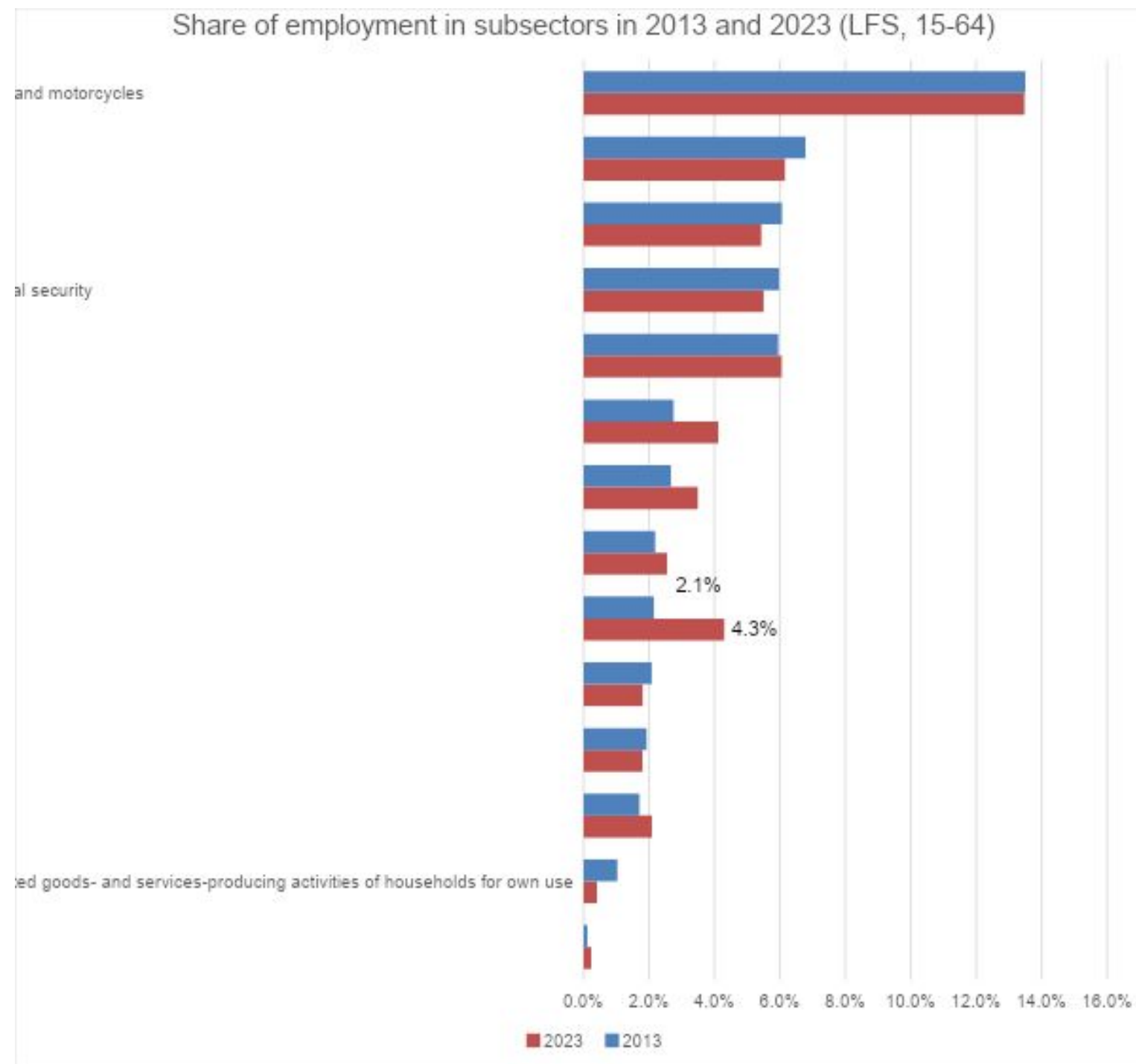
Case study Serbia: Collective bargaining in publishing sector

Galjina Ognjanov, Mihail Arandarenko, Dragan Aleksic

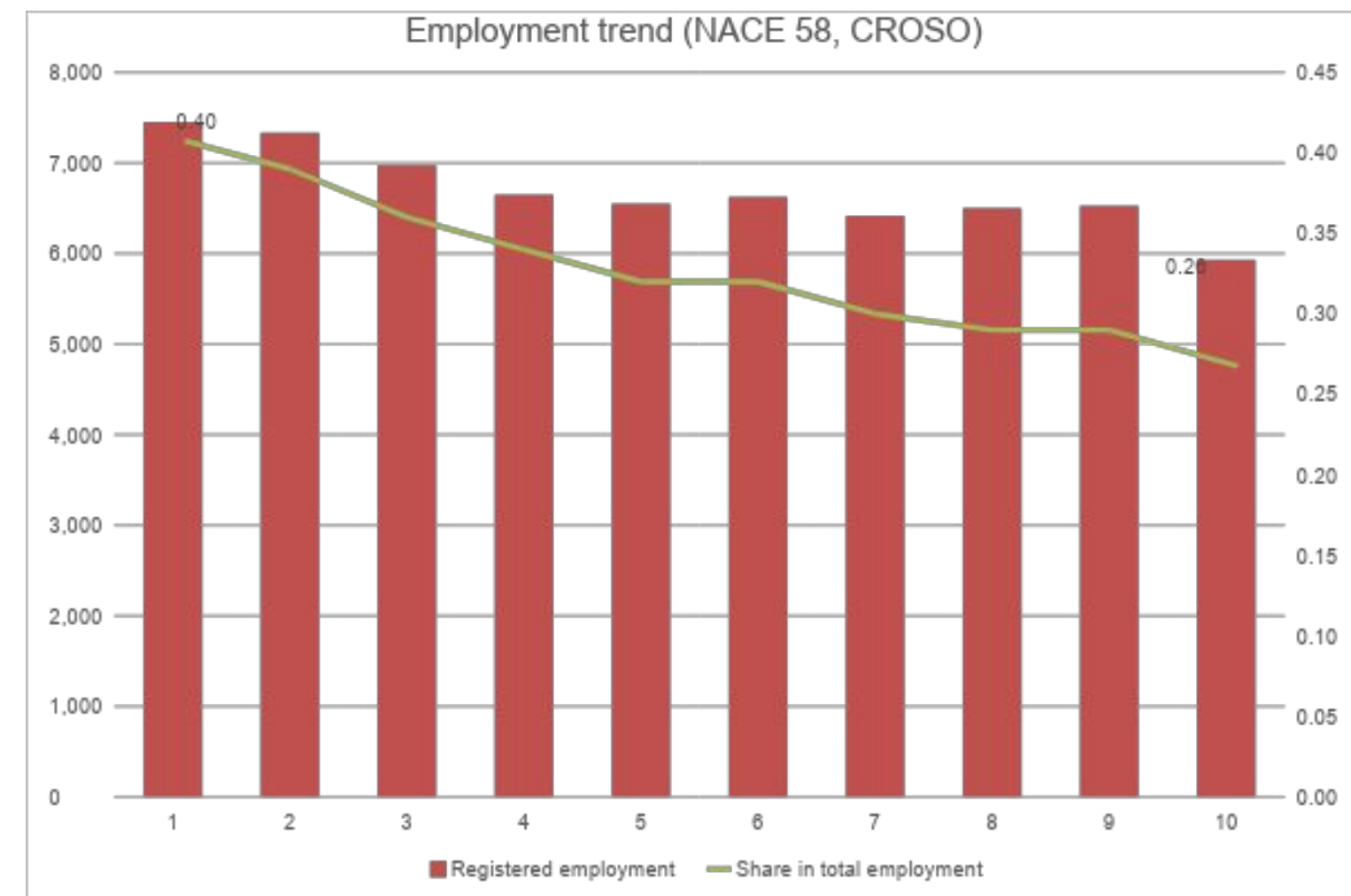
BARSERVICE



Key characteristics of the Publishing sector in Serbia

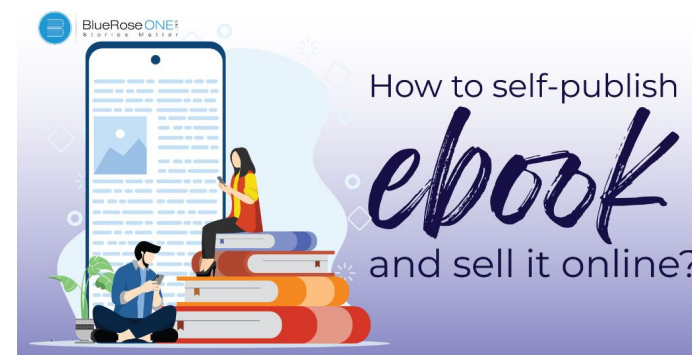


Part of IC (J) is the fastest growing sub-sector in services (creative industry).
FOCUS is NACE 58 (publishing books, newspapers & software), 5.5% of J (r.e.).



Key characteristics of the Publishing sector in Serbia

- Registered employment decreased from 7,451 to 5,928 as well as the number of registered businesses also decreased from 955 in 2014 to 780 in 2022 (SORS, 2023), yet average gross wage stayed almost constant and above national average (112%, 2024).
- Turnover, value of output and value added have been growing since 2014 in absolute numbers, yet the share in total shows decreasing trend.
- Publishing activities are particularly affected by digital transformation which opens space for company downsizing.
- In combination with privatization of previously state owned publishers (e.g. print media companies) it led to market consolidation (reducing the number of businesses).
- MOJO, AI in journalism reduced the needs for some positions (e.g. photographers, text editors etc.) yet opened the need for yees' skills development.



State of collective bargaining

- Sectoral bargaining non existent.
- CBAs signed in publishing companies in public sector.
- Estimated bargaining coverage rate 10% (owing to 2 big public book publishing companies).
- Examples of CBAs among private publishers rare, data unavailable except for a few recently fully privatized print media companies.
- One representative sectoral trade union for J (rather diverse in terms of jobs, skills and employment status of workforce).
- TUs strongest in companies with longer tradition of unionization & companies with older workforce.
- Younger generations hesitant to unionize.

Challenges of collective bargaining

- Atypical work contracts hinder unionization and contribute to further precarization of work, particularly among freelance journalists.
- Flexible work (e.g. from home) reduces opportunities to meet and discuss employees' rights related issues and to initiate CB.
- Publishing (print media) faces general problems of the media industry as a whole thus they have joined in a trade union more relevant for media workers.
- Only a few print media outlets have company based TUs whose bargaining position remains rather low.
- The only representative body is Serbian Association of Employers (SAE), yet publishing companies are not interested to associate.
- Not interested in collective bargaining.
- Negative perception & raising hostility of private publishers and media owners toward CB.

“any mentioning of an idea to establish a trade union leads to deterioration of employee-employer relations”

BARSERVICE

Toward new bargaining approach

- Inclusive sectoral collective bargaining for all media workers regardless their employment status.
- Based on involvement and activation of the new actors on both sides and development of intra and inter organizational trust.
- Focused on education and activation of young generations to unionize to protect collective rights.
- Enrooted in frequent consultations, proactivity and flexibility of negotiators.

4 pillars of SMART bargaining

- SCB
 - Inclusiveness
 - Training
 - Trust
 - Proactivity

BARSERVICE

Thank you for your attention!

Discussion

1. In Türkiye, there was a **200% increase in bargaining coverage**. How did this happen and what can others learn from strategies deployed in Türkiye's publishing sector?
2. Can we identify **good practices in collective bargaining** in publishing? E.g. setting up unions, starting bargaining, new topics being included, or examples of multi-employer bargaining?
3. The research highlighted the need for developing specific collective bargaining models for **digital media workers and freelancers**, is this an opportunity to strengthen collective bargaining? What steps were already taken to reflect the **needs of freelancers**?
4. How does **UNI Europa support freelancer workers** in the publishing sector overcoming these challenges? And is UNI Europa engaged in **social dialogue in the publishing sector** at the European level?

Thank you for your attention!

www.celsi.sk/en/barservice

36 country reports (4 sectors, 9 countries)

4 sectoral comparative reports

9 country policy briefs

9 country videos

Report on collective agreements

Report on undeclared work

BARSERVICE