



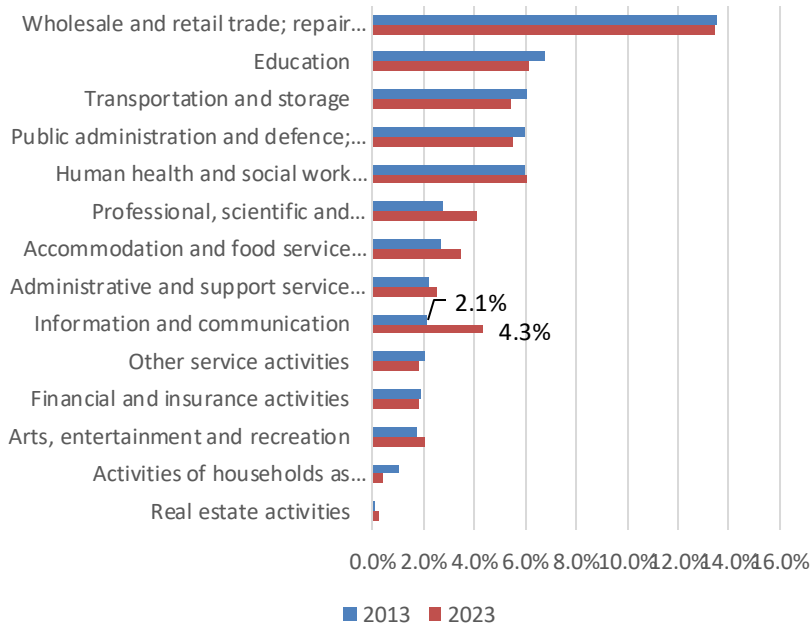
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Case study Serbia: Collective bargaining in publishing sector

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Key characteristics of the Publishing sector in Serbia

Share of employment in subsectors in 2013 and 2023 (LFS, 15-64)



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.).

Employment trend (NACE 58, CROSO)



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 employees' 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

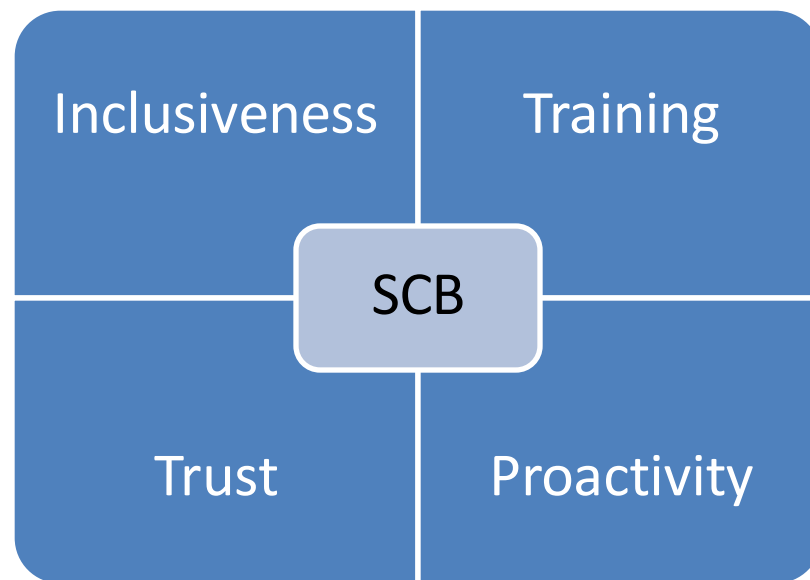
- Atypical work contracts hinder unionization and contribute to further precarization of work, particularly among freelance journalists.
 - Flexible work (e.g. from home) reduces opportunities to meet and discuss employees' rights related issues and to initiate CB.
 - Publishing (print media) faces general 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”



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



Thank you for your attention!