

BARSERVICE



Comparative Report: Publishing sector

Author:

Stan De Spiegelaere

UNI Europa



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1. Introduction

The publishing sector plays a pivotal role in our democratic societies. As a cornerstone of free press, it provides a platform for diverse voices and ideas, gives space to debate and spreads knowledge across borders. At the same time, under pressure, the sector cannot fulfil those roles and put into peril real freedom of expression and, in the end, democracy.

Focusing on the state of the publishing sector and the collective bargaining happening in that sector is therefore no luxury. This report gives a comparative overview of the current state of the publishing industry in Czechia, Croatia, France, Italy, North Macedonia, Romania, Serbia, Slovakia, and Türkiye. It focuses on the state of collective bargaining and challenges and opportunities for its development.

The main insights from the comparison are:

- **Digital disruption is leading to atypical employment:** The rise of digital media, e-books, and online platforms has revolutionized content production, distribution, and consumption in all the studied countries. This is leading to some major disruptions in the sector and the rise of much more freelance and temporary employment.
- **Unions and employers are weak, resulting in low bargaining coverage.** In all countries (except for France and Italy), trade unions and employer organisations are facing low membership and resources. Lacking a real tradition of collective bargaining, the coverage remains weak and builds on sparse company-level agreements
- **(European) Policy solutions can help but are not enough.** To increase coverage, some policy changes can be envisaged, several of them through pressure from EU level directives. The prime is capacity building and evolving towards multi-employer or sectoral bargaining. However, capacity building is also a matter of the organisations.

2. Sector characteristics

The publishing sector refers to NACE rev2 58 and includes activities related to the publishing of book, directories and catalogues, newspapers, magazines and periodicals; and other publishing activities; it also includes software publishing.

Looking at data from Eurostat (Table below) we can see an almost continuous decline in employment, both in absolute and relative figures. While in 2010, the sector represented about 0.6% of total employment in Europe, this has shrunk to less than 0.4% in 2024.



The same trend can be seen in roughly all countries under study here. Only in France, the sector is growing in absolute figures, while declining a little in terms of relative weight.

Table 1 Main characteristics - employment in the sector

	2010, Q1 % of		2015, Q1 % of		2020, Q1 % of		2024, Q1 % of	
Total EU 27	Empl. (1000s)	total emp.	Empl. (1000s)	total emp.	Empl. (1000s)	total emp.	Empl. (1000s)	total emp.
Croatia	1,027.4	0.56%	893.	0.49%	708.5	0.37%	753.	0.38%
Czechia	19.5	0.41%	18.2	0.37%	16.5	0.32%	13.1	0.26%
France	150.4	0.59%	116.4	0.45%	120.4	0.45%	156.2	0.55%
Italy	82.8	0.38%	72.2	0.33%	53.	0.24%	57.1	0.25%
North Macedonia	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
Romania	21.0	0.26%	17.7	0.22%	7.7	0.09%	12.3	0.16%
Serbia	n.d.	n.d.	11	0.45%	4	0.14%	8	0.29%
Slovakia	9.7	0.43%	2.9	0.12%	4.9	0.20%	n.d.	n.d.
Türkiye	38.4	0.19%	18.4	0.07%	16.3	0.06%	20.1	0.06%

Source: Eurostat.

The country reports mirror this image as many of the contributions talk about ‘significant declines’ in employment (Croatia, Italy, Türkiye) or even a 20% drop in employment (Serbia).

The main reasons for this decline can be summarized as:

- **Digital transition and automation:** The shift from analogue to digital publishing has had a profound impact on the sector. As the Croatian report states, “the preparation segment, which was the most extensive, has been drastically reduced, with clients now handling their own preparation while printers focus solely on finished material.” Similarly, in Türkiye, “content production and distribution powered by artificial intelligence have enhanced efficiency while posing a threat to traditional workforce roles.” The French report suggests that the rise in digital publishing has been “fatal” for the book market economy.
- **Decreasing advertisement income:** The printed subsectors face a decline in readership, and consequently, a decline in advertisement income. For example, in Serbia, this puts strain on companies to reduce employment. The Serbian report highlights that “*the decline in readership has led to a significant drop in*



advertisement revenues, forcing companies to cut costs, often at the expense of their workforce.”

- **Changing customer habits:** The move towards e-books and digital reading puts enormous pressure on the book market. In Italy, the market for printed copies drops by 4-5% yearly with no end in sight. The Italian report notes, *“Newspapers, since 2008 and especially in Italy, have begun a crisis whose end is not yet in sight... year after year, unfortunately, the printed copies sold drop inexorably by 4-5% every year.”*
- **Privatization:** In a couple of countries, privatization has also been an issue. For instance, in Serbia, the privatization of media has led to the closure of at least 50 trade union organizations on company levels, significantly impacting collective bargaining and workers' rights.
- **Sustainability:** According to some reports, there is also an increased focus on environmentally friendly production. In Czechia, the adoption of environmentally friendly materials and processes is becoming a priority as publishers respond to consumer demand for eco-conscious products. This shift not only aligns with global sustainability goals but also offers opportunities for innovation within the industry.

At the same time, some sub-sectors seem to be coping rather well or even **growing**. For instance, the **Croatian** packaging printing sector is experiencing growth. The report highlights, *“What is going in a positive direction is packaging printing, which is experiencing continuous and constant growth because the printing industry's products are used in a growing spectrum of packaging materials”* (Croatia report, p. 2). Similarly, the **Italian** book sector remains robust. According to the report, *“In 2022, bookselling was the first cultural industry in Italy per consumer spending and the fourth largest in Europe”* (Italy report, p. 3).

Next, most sectors are characterized by a degree of **oligopoly**, with a small number of publishers dominating over a large number of very small publishers. This is evident in **North Macedonia**, where Ars Lamina and Prosvetno dominate the market. The report states, *“Key players, including Ars Lamina, Prosvetno Delo, and Trimaks, dominate this space, shaping the market and meeting the evolving demands of readers and institutions”* (North Macedonia report, p. 3). In **Czechia**, however, the top five publishers account for just 12% of the market share. The report mentions, *“While major players such as Albatros Media and Euromedia Group lead the market with approximately 1,100 and 800 published titles annually, respectively, their collective influence remains modest. The five largest publishing houses account for only 12% of the market share”* (Czechia report, p. 2). Next to these, there are

over 6,000 small and mid-size publishers, with 70% of the market in Czechia distributed among 236 mid-sized publishing entities (Czechia report, p. 2).

In most countries, there is a considerable presence of **public publishers** in the sector through public broadcasting companies, university book publishers, and others. This is the case for Romania, Serbia, Slovakia, Czechia, and Türkiye. The report highlights, "*In Romania, public publishers include university presses and other public institutions*" (Romania report, p. 4). Similarly, in **Serbia**, "The sector is dominantly private, except for two big public book publishing companies" (Serbia report, p. 3). In **Slovakia**, "Some specialized publishers may be part of larger public entities, or non-profit organizations" (Slovakia report, p. 6). In **Czechia**, "Academic institutions and other organizations also contribute through university presses and specialized publishing activities" (Czechia report, p. 2). Finally, in **Türkiye**, "Public broadcasting companies and university book publishers play a significant role in the sector" (Türkiye report, p. 10).

3. State of bargaining & main challenges

In most countries, **collective bargaining coverage** in the publishing sector is very low, except for Italy and France (see later). In the other countries, the (sometimes estimated) coverage rates do not exceed 20% of the workforce, with bargaining coverage in Türkiye reaching only 2.2%.

A 200% in collective bargaining coverage in Türkiye: between 2013 and 2023, collective bargaining coverage in the Turkish publishing sector seems to have boomed with a 200% rise. In absolute figures, we're talking about an increase from 0.68% coverage to 2.2%; building on a rise of collective agreements from 14 to 36. These figures show the challenges of reaching significant coverage with only company agreements in a sector like the publishing sector.

In some cases, collective bargaining in the sector is predominantly concentrated in public book publishers. This is particularly the case in **Serbia** where two company level agreements in two big public book publishing companies account for most of the 10% total coverage rate. In **Slovakia**, the sector has some sectoral bargaining through an agreement for the university publishing houses, and some workers are covered by an education sector collective agreement.

Table 2 - Main challenges to collective bargaining

Main challenges	Countries discussed
Decentralized bargaining	HR, SK, MK, TR, CZ, RO
Lacking culture, inapt structure	CZ, RO
Lack of capacity of union	MA, SB, SK, TR, RO,
CZ Lack of interest & capacity of employers	MK, RO, SK, HR,
IT, SE Atypical employment	CZ, MK, SB, FR, RO
Digital disruption	All countries

In summary, the state of collective bargaining in most countries (apart from Italy and France) is very weak. Throughout the reports, a number of reasons and challenges have been identified:

- **Decentralized bargaining:** In countries like **North Macedonia** and **Türkiye**, there are virtually no sectoral agreements in general, and therefore also not in the publishing sector. In some others like **Croatia**, sectoral agreements exist but are limited to a number of sectors with publishing not being included. This means that collective bargaining is limited to company-level agreements, which cover fewer workers and are often only present in larger companies. In **Czechia**, the lack of higher-level agreements is identified as the primary challenge for collective bargaining. Workers in the National Library have limited leeway in their company bargaining due to their reliance on public funding. A sectoral agreement could evade this and push wages up in the library and in all libraries in the country. Added to this, in roughly all countries, the small size of companies in the publishing sectors hinders effective organizing, and therefore also collective bargaining (e.g. France, Italy). For instance, in **France**, the predominance of small companies limits union representation and the negotiation of company-level agreements. The report highlights that "99% of companies can be classified as SMEs (i.e., employ less than 250 workers), with 91% being classifiable as micro-enterprises (employing less than 10 workers)". Similarly, in **Italy**, the report notes that "51.7% of active publishers were 'micro-publishers' (producing no more than 5 thousand copies), while only 2.4% are classified as 'large publishers' because their annual output is more than one million copies"
- **Lack of bargaining culture, inapt structure:** As highlighted in several reports (e.g., **Czechia**, **Romania**), employers are not keen on collective bargaining and prefer unilaterally imposing wages and working conditions. In **Serbia**, there is even an

unconstitutional prohibition of unionization in many small companies. The Serbian report notes, “any mentioning of an idea to establish a trade union leads to deterioration of employee-employer relations” and “any insisting on establishment of trade unions will lead to termination of work contract.” In **Romania**, there is a possibility of having sectoral agreements, yet the definition of the sectors decided in 2023 does not facilitate the reality. Many employers operate simultaneously in several sectors leading to a fragmentation of bargaining units, complex negotiations and a possible evasion of collective agreed standards.

- **Lack of capacity of unions:** In many countries, trade unions are fragmented and have only a limited number of members, limiting their capacity to put pressure and push for collective bargaining (e.g., North Macedonia, Serbia, Türkiye, Romania). In **Slovakia**, there is simply no sectoral trade union that could engage in sectoral bargaining. Often, existing trade unions focus on parts of the publishing sector that are still in some way public, or used to be, such as university publishing houses or public broadcasters. The fact that most bargaining happens on the company level also results in expertise problems for trade unions. Given that collective bargaining can be highly technical, a small local union is often not well equipped for this (e.g., Czechia). In **North Macedonia**, the report mentions, “The fragmented structure means that there is no unified negotiating partner for collective bargaining on a national level, making it impossible to negotiate a comprehensive, sector-wide agreement that could address issues such as wages, benefits, and working conditions across all libraries”. In **Türkiye**, the institutional ‘double threshold’ system for collective bargaining is a serious obstacle. Under this system, a trade union needs to represent X% of the local and X% of the national sectoral workforce to be able to bargain. This system, combined with a long appeal process, makes it very difficult to reach an official, legal, collective agreement. In other countries, thresholds on union organising play a similar role (e.g., France).

10 people on strike: In 2023, there were three workplaces in Türkiye with industrial action. Of the total of 68 employees, only 10 participated in the strike according to official data.

- **Lacking employer capacity/interest:** Lacking employer interest and capacity another challenge for collective bargaining in the publishing sector across various countries. In **Romania**, many employers lack the motivation to form representative associations, making sectoral negotiations impossible. The report highlights, “*Most publishing and printing companies lack formal employer associations, making sectoral negotiations impossible*”. In Slovakia, while many employer organizations exist, they do not have the mandate to bargain sectoral or multi-employer

agreements. Yet, even in Italy and France, employers' lack of interest in engaging in collective bargaining is a significant barrier. The Italian report notes, "Employers point to the decreasing financial margins of the companies as a reason for their lack of interest in updating collective agreements."

- **Digital disruption and typical employment.** Given that the publishing sector has a high proportion of workers on a temporary or freelance basis, individual bargaining tends to dominate (e.g. Czechia, North Macedonia, Serbia, France, Romania). This is partly due to the structural shifts to digital publishing in the sector. In addition, increasing remote work is an obstacle to collective bargaining (e.g., Serbia). In some countries, some collective efforts exist, but they resemble more 'collective advocacy' rather than bargaining. Such advocacy efforts focus on raising awareness, which sometimes happens in professional organisations that are not trade unions (e.g., Czechia).

All these challenges lead to a high degree of **power imbalance** between employers and workers. As such, the North Macedonian report notes that "*employers dictate the terms of negotiations, leveraging the fragmented union landscape and the individualized nature of agreements*" (p. 5).

The two outliers in terms of collective bargaining coverage are **Italy and France**. Both have coverage rates that are well above 80%. The general strength of the system of industrial relations with well-organized unions and, above all, an institutional infrastructure facilitating sectoral collective bargaining obviously accounts for this high coverage.

4. Smart bargaining and development opportunities

After identifying several challenges to collective bargaining in the publishing industry, the report turns to the idea of "smart bargaining," or a set of ideas that could help address the challenges identified.

To structure the proposed ideas, this comparative report lists them according to the challenge to which they are (more or less) related.

Table 3 - Challenges and opportunities

Main challenges	Smart Bargaining opportunities
Decentralized bargaining	Sectoral bargaining (MK, SK)
Lacking culture of collective (SB) bargaining	Create awareness and trust
Lack of capacity of union	Capacity building (RO), training (FR, RO), organize freelancers (TR)
Lack of interest & capacity of employers	Good faith negotiation rules (MK), incentives for employers (RO), avoid employer avoidance (TR)
Digital disruption and atypical employment	Reduction of bogus self-employment (IT), integrating freelancers in agreements (MK, TR)
Other	Negotiate non-wage issues in collective agreements

4.1 Decentralized bargaining

As discussed above, collective bargaining is highly decentralized in most of the countries covered, with company-level agreements predominant, and even then only in the largest or public companies. Several interviewees suggested strategies to cope with this.

First, several ideas focused on **strengthening and broadening company-level bargaining**. For this, one would require the setup of new (and stronger) unions and employer associations. For instance, in **Croatia**, the Trade Union of Printing and Media Industry (SGMH) has been actively working to attract new members by showcasing the rights they have managed to negotiate in-house collective agreements. The union has also emphasized the need for educating citizens about labour relations to foster a culture of negotiation.

Second, a number of interviewees have proposed the **introduction, extension, or facilitation of sectoral agreements**. This is the case in **Croatia, Slovakia, Romania, and North Macedonia**. In **Croatia**, the sectoral union believes that encouraging sectoral negotiations

by the state and lowering the union representativeness threshold for collective bargaining from 20% to 10% would be beneficial. Similarly, in **Romania**, the report highlights the need for a unified sectoral framework to ensure comprehensive and enforceable agreements, given the fragmented nature of the sector. The North Macedonian report states: *“By mandating that agreements negotiated at the sectoral level apply to all workers, regardless of union membership, policymakers can create consistent employment standards. This approach would address disparities and provide protections for freelancers and non-traditional workers who currently operate outside the scope of most agreements.”*

In some cases, the approach favoured an **extension of existing sectoral agreements** to the publishing sectors. For example, in **Slovakia**, the report suggests that extending the coverage of already existing collective agreements in other related sectors to employers in the publishing sector could help prevent workers from being left uncovered. In **Türkiye**, the report emphasizes the importance of developing specific collective bargaining models for digital media workers and freelance employees to ensure their protection.

4.2 Lacking culture, inapt structure

The second challenge identified was the lack of collective bargaining **culture**, which obviously also relates to the existing structure and institutions.

The **North Macedonian** contribution reflects on how good faith negotiations and union-management collaboration could address some of the concerns and establish a culture of bargaining and cooperation. The **North Macedonian** report highlights that *“employers often resist sectoral agreements, preferring individual contracts”*. To counter this, it suggests establishing regular platforms where employers, unions, workers, and policymakers can meet and discuss issues to create the necessary trust and understanding. This approach aims to foster a collaborative environment and build trust over time. Also the Serbian contribution emphasized trust: *“Building trust between employers and unions is essential for developing a sustainable smart bargaining model”*

Compliance is also crucial. The **North Macedonian** contribution suggests ensuring sufficiently high penalties and raising workers’ awareness of their rights to enforce compliance. Similarly, the **Romanian** contribution emphasizes the need for more stringent requirements to conclude agreements and penalties for non-compliance. The **Romanian** report states, *“Employer organizations must also adopt a more proactive position in collective bargaining by recognizing the long-term benefits of stable labor relations”*. One way to achieve this is by improving national sectoral dialogue forums, which could help build trust among the parties involved.

Another effective strategy is mediation. The **Romanian** contribution suggests that an impartial third party could assist in conflict resolution and lead to more collective agreements being made. This approach could help overcome the resistance and mistrust that often hinder the bargaining process.

Again, in **Romania**, legal barriers significantly limit the effectiveness of bargaining. Romania's laws allow for bargaining initiation but do not require employers to *conclude* agreements, making negotiations largely symbolic. Trade unions call for stricter legal obligations, including mandatory sectoral agreements and penalties for non-compliance. The report highlights, "*The current legal framework in Romania creates a tenuous relationship between legal regulation and collective bargaining*". Additionally, the definition of sectors is a legal obstacle, with trade union representatives advocating for merging Sectors 34 (Publishing, Printing, Distribution), 35 (Mass Media), and 36 (Culture) into a single sector to create a unified framework for more effective social dialogue.

4.3 Lacking trade union capacity

One of the main challenges is the limited capacity of trade unions for effective and broad collective bargaining. While there is a variation in trade union strength, all countries face the same challenge of low membership rates and weak representation, particularly among younger workers and freelancers.

Strengthening membership. In almost all countries, especially in **Serbia, Slovakia, and Romania**, unions struggle with **low membership rates and weak representation**, particularly among younger workers and freelancers. Trade unions could focus on increasing representativity on these fronts. This can be achieved by providing these workers with training and negotiation skills. The **North Macedonian** report suggests that "unions must expand their membership to include freelancers and part-time workers" (North Macedonia report, p. 8). This strategy not only broadens the union's base but also ensures that a larger portion of the workforce is represented in negotiations.

Strengthening representation. Independent of increasing membership, structural and organisational barriers exist to higher union density. One of the main challenges is the limited capacity of trade unions for effective and broad collective action. As such, in **Serbia** and **Türkiye**, the existing legal thresholds complicate union capacity. A union must represent at least 15% of the employees in a company to be considered representative and eligible to negotiate collective agreements. Additionally, for sectoral bargaining, a union must represent at least 10% of the total workforce in the sector. These thresholds often pose challenges for unions, particularly in smaller companies and fragmented sectors. In **Türkiye** these thresholds are higher with company bargaining being only possible if a union represents 50%+ of the company workers and 1% on the sectoral level. Additionally, employers often challenge union recognition, leading to prolonged disputes that weaken bargaining power. The report states, "These high thresholds make it difficult for unions to gain the necessary representation to negotiate collective agreements, particularly in industries with a large number of small workplaces".

In **Romania**, the issue is a lacking sectoral union power. By merging smaller unions into larger, more powerful entities, they can better represent workers' interests and negotiate more effectively. The Romanian report emphasizes the need for a unified approach: "Collaboration between social partners at multiple levels ensures a unified approach to sector-wide challenges".

Strengthening local structures. In Czechia and North Macedonia, unions could more actively integrate themselves into workplace structures by participating in onboarding processes for new employees (CZ). Next, the Czech report highlights the use of digital tools to increase employee participation in bargaining, with online platforms allowing workers to comment on agreements and suggest changes anonymously. This approach enhances transparency and ensures that agreements reflect employee priorities

Utilizing Digital Tools. In Czechia, digital tools are being used to increase employee participation in bargaining. Online platforms allow workers to comment anonymously on agreements and suggest changes, enhancing transparency and ensuring that agreements reflect employee priorities. Expanding such tools across other countries could help unions reach younger workers and freelancers, who are traditionally difficult to organize. The Turkish contribution specifically suggests that unions organize on digital platforms where the next generation of media workers is active (Tü report, p. 9).

Addressing Expertise and Resource Gaps. Problems regarding expertise and resources can be addressed in a variety of ways. For one, the North Macedonian contribution suggests cooperation with NGOs or international labour organizations to meet this lacuna. By partnering with these organizations, unions can access additional resources and expertise to strengthen their bargaining power. The report states, "Public-private partnerships can provide additional support for these initiatives, leveraging government funding and expertise to expand their reach" (North Macedonia report, p. 9).

4.4 Lacking employer capacity/interest

Employer bargaining capacity can equally be increased in a variety of ways in the publishing sector.

The **Romanian** contribution suggests giving incentives to employers to form employer organizations. *“This can be facilitated through tax incentives, financial grants, or even regulatory mandates requiring sector-wide representation”*. This approach aims to encourage employers to participate in collective bargaining by providing tangible benefits for their involvement.

In both Italy and France, there are suggestions to increase the interest of employers in bargaining agreements (or following sectoral ones) by making some subsidies or incentives dependent on their participation. For instance, in **Italy**, the report highlights the need for economic incentives to companies that do not engage in contractual dumping and generally follow legal and contractual rules. The **Italian** report states, *“Economic incentives to companies that do not engage in contractual dumping and generally follow legal and contractual rules”*.

The **Slovakian** contribution signals that many employer organizations exist, but they are not mandated to bargain sectoral or multi-employer agreements. Accordingly, legislation could address this issue by mandating such negotiation power. The Slovak report mentions, *“The new legislation establishes that all organizations, if members of a recognized higher-level employers’ associations, are seen also as employers’ associations that can engage in collective bargaining”*.

4.5 Digital disruption and atypical employment

One of the most pressing challenges in the publishing sector is digital transformation, which has changed job roles, employment structures, and labour needs. Countries such as France and Italy have recognized that traditional collective agreements no longer align with the realities of digital publishing, remote work, and freelance work.

The **French** contribution stresses the need to adapt the collective agreements in the publishing sector regularly to keep them updated with the ongoing transformation. One element in this is the classification and qualification system, which would need to be revised. Public policy could put extra pressure on this by making public subsidies contingent on following such updated collective agreements. The report highlights, *“The adaptation of classification and qualification systems is a fundamental element for building trust between the workforce and the trade unions”*.

In **Italy**, there is a high need to adapt the existing agreements to the rapidly changing reality in the sector. However, while employers point to the decreasing financial margins of the companies, trade unions want to update the classification schemes to include new roles. The Italian report mentions, *“Some benefits provided by the collective agreements date back to a season when newspapers made a lot of money and could afford to distribute those earnings. That is no longer the case”*. This highlights the tension between financial constraints and the need for modernization.

Moreover, given the fact that the digital disruption leads to an increase in the proportion of atypical employment (freelance, project work, temporary work), this presents several challenges for collective bargaining. It is more difficult to organize such workers in trade unions, and their interests are often not included in existing collective agreements.

The **Italian** contribution focuses on reducing the number of bogus self-employed in the sector. One way of addressing this is through collective bargaining. The report states, *“The real problem in the sector has been the excess and improper use of nonemployment contracts, such as [...] or project-based collaborations [...] lasting decades. [...] We have made progress on that, stipulating collective agreements that foresee the stabilization of a percentage of fixed-term workers”*. Similarly, in **North Macedonia**, smart bargaining should incorporate protections for freelancers and discuss gender equality and sustainability. The report suggests, *“Smart bargaining mechanisms now include flexible agreements tailored to part-time and freelance workers”*. **Türkiye** also faces a growing freelance workforce, with smart bargaining efforts focusing on securing social protections for freelance journalists and integrating digital work conditions into agreements. The Turkish report emphasizes, *“Developing specific collective bargaining models for digital media workers and freelance employees could ensure that these groups are also protected.”*

While digital disruption poses challenges, it also creates opportunities. For instance, **Türkiye** is incorporating AI into its bargaining processes. The report notes, *“AI-driven platforms support negotiations by providing real-time data and predictive analytics, enhancing decision-making”*. This technological advancement can help streamline negotiations and make them more efficient.

4.6 Other

Some other smart bargaining solutions were further suggested. First, given the financial constraints in the publishing sector, many collective agreements prioritize non-monetary benefits over wage increases. This approach helps enhance employee well-being without imposing unsustainable financial burdens on employers. In **Czechia, France, and Türkiye**, agreements focus on additional leave, professional development, and work-life balance rather than salary hikes. French unions push for vocational training to help workers adapt to digitalization. In Türkiye, smart bargaining addresses gender inequality with proposals

to reduce wage gaps and ensure transparency in promotion processes. In **Czechia**, collective agreements focus on additional leave, professional development, and work-life balance rather than salary hikes: "Agreements commonly include provisions for additional leave for life events, relocation support, and professional development opportunities". These benefits help improve the overall quality of life for employees without significantly increasing costs for employers.

Slovakia emphasizes job security provisions for workers in financially unstable publishing companies. The report highlights the importance of ensuring that workers have stable employment even in times of financial uncertainty.

5. European perspectives

The Directive on Adequate Minimum Wages is a significant piece of legislation aimed at ensuring fair wages and promoting collective bargaining across the European Union. It requires EU Member States to verify the adequacy of their statutory minimum wages and adopt measures to promote collective bargaining, especially in countries where coverage is below 80%.

The Directive on Adequate Minimum Wages has had varied effects on collective bargaining in the publishing sector across different countries. For one, the effect is different because some countries are not EU members, and others have collective bargaining coverage above 80%.

Non-EU members: Although the EU Directive does not apply to non-EU member states, still some impact can be observed in the included countries. As such, in **North Macedonia** the directive is viewed as a benchmark for fair wages, helping unions address wage disparities and improve bargaining frameworks. Similarly in **Türkiye** the directive serves as a guiding principle rather than a binding legal instrument. Nonetheless, it plays a role in shaping labour reforms and promoting better collective bargaining practices, particularly concerning freelance workers and gender wage gaps.

Countries with high collective bargaining coverage. In France and Italy, the collective bargaining coverage is over 80%, meaning the countries need to transpose the Directive, but are not obliged to draft national action plans on the promotion of collective bargaining. Accordingly, in **Italy**, the directive has had little effect, primarily because the country lacks a statutory minimum wage and already exceeds the directive's collective bargaining coverage threshold of 80%. Similarly, in **France**, while the directive has not yet been transposed into law despite the deadline having passed, discussions on a draft law are ongoing. Since collective bargaining coverage in France exceeds 80%, the country does not need to implement an action plan to increase coverage.

Countries with lower coverage. In the other countries (Czechia, Slovakia and Romania), the Directive needs to be transposed and national action plans on the promotion of collective bargaining need to be developed. However, the impact is diverse:

- In **Czechia**, no significant impact has been observed due to the general absence of collective bargaining practices in the industry.
- In **Romania**, the directive is seen as a potential game changer, as wage negotiations are closely tied to the national minimum wage. Any mandated wage adjustments would automatically influence salaries in the publishing sector, potentially expanding bargaining coverage. Romanian unions actively engage with EU-level social partners such as the European Federation of Journalists (EFJ) and UNI Global Union to strengthen their collective bargaining position.
- **Slovakia**: The directive's impact is still being assessed, but it is expected to influence wage standards and collective bargaining practices significantly.

Next to the directive, the EU can have an impact through collaboration with EU-level trade unions. For the **Romanian and Turkish** publishing sectors, international trade unions like UNI MEI, EFJ, and IFJ provide essential support in legal matters, policy development, and training programs. Despite these advantages, internal disunity among Romanian unions weakens their ability to negotiate effectively.

6. Conclusions

The comparative analysis of the publishing sector across Czechia, Croatia, France, Italy, North Macedonia, Romania, Serbia, Slovakia, and Türkiye reveals a complex landscape marked by significant challenges and opportunities. The sector is undergoing profound changes driven by digital transformation, economic pressures, and evolving consumer habits. These changes have led to a decline in traditional employment and a rise in atypical work arrangements, such as freelance and temporary work.

One of the key findings is the low collective bargaining coverage in most countries, with the notable exceptions of France and Italy. The decentralized nature of bargaining, coupled with a lack of strong union and employer organizations, has resulted in fragmented and often ineffective collective agreements. This situation is exacerbated by legal obstacles, such as high unionization thresholds and inadequate enforcement mechanisms, which hinder the development of robust collective bargaining frameworks.

Despite these challenges, the report identifies several strategies to enhance collective bargaining in the publishing sector. These include:

1. **Strengthening Union Capacity:** Expanding union membership to include freelancers and part-time workers, providing training and negotiation skills, and leveraging digital tools to increase employee participation in bargaining.
2. **Encouraging Employer Participation:** Offering incentives such as tax breaks, financial grants, and regulatory mandates to encourage employers to form organizations and engage in collective bargaining.
3. **Adapting to Digital Transformation:** Regularly updating collective agreements to reflect the realities of digital publishing, remote work, and freelance work. This includes revising job classifications, integrating digital skills training, and ensuring protections for digital and freelance workers.
4. **Promoting Sectoral Bargaining:** Introducing or extending sectoral agreements to cover more workers, including those in non-traditional employment arrangements. This approach can help create consistent employment standards and provide protection for all workers.
5. **Enhancing Legal Frameworks:** Implement stricter legal obligations for employers to conclude agreements, lower unionization thresholds, and ensure high penalties for non-compliance. Additionally, merging overlapping sectors can create a unified framework for more effective social dialogue.

The Directive on Adequate Minimum Wages plays a crucial role in shaping collective bargaining practices, particularly in countries with lower coverage. While its impact varies, the directive serves as a benchmark for fair wages and promotes better collective bargaining practices.

In conclusion, addressing the challenges in the publishing sector requires a country-specific approach that includes capacity building, legal reforms, and the adoption of smart bargaining strategies. By fostering collaboration among social partners and leveraging international best practices, the sector can achieve more effective and inclusive collective bargaining, ultimately leading to better working conditions and a more sustainable industry.