

BARSERVICE

Towards smart bargaining in the publishing sector in Serbia

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Executive summary

The country report presents general overview of Publishing sub-sector in Serbia. It presents most relevant labour market statistics regarding Information and communication in general as well as Publishing as one of its sub-sectors, focusing particularly at print media publishing, book publishing and software publishing (NACE 58). The report further builds upon state of collective bargaining and its main challenges in publishing sub-sector. Finally, ideas for development of smart bargaining model primarily regarding print media publishers (along with other media) as well as European perspectives are discussed.

Publishing is a rather small sub-sector taking into consideration both the number of employees and registered businesses. The sector is dominantly private, except for two big public book publishing companies. Where implemented, collective bargaining is company level only. CBA coverage is estimated at around 10%, owing primarily to the two big public book publishers, whereas literary a few private print media publishers have also company CBAs signed.

The report addresses specific challenges to collective bargaining in publishing sector, which are primarily related to the low membership, the weak position of trade unions as well as rather negative employers' attitudes, and lack of interest to associate to start bargaining on sectoral level. Therefore, smart collective bargaining in publishing assumes taking actions toward creation of new actors, i.e. establishment of trade unions at company level, establishment of new employers' associations as well as creation of better trust between the actors.

I. Sector identification and trends

Publishing (NACE 58) is a part of Information and communication (J), the fastest growing sub-sector in services by registered employment and share of employment in Serbia since 2014.¹ Registered employment in Information and communication more than doubled from 51,628 in (2014) to 107,522 in 2023, while the share of employment showed continual growth throughout the observed period, from 2.8% in 2014 to 4.7% in 2023 (CROSO). In the same period, the number of registered businesses increased from 4,260 in 2014 to 8,806 in 2023 (SORS, 2023).

Similar growing trend in Information and communication is also evidenced by LFS data, showing 2.2 pp employment increase 2023/2013, the highest among all sub-sectors in services in Serbia.² According to LFS, total employment in Information and communication grew from 60,300 in 2014 to 122,200 in 2023. Informal employment rate (4.2%, 2020) is lower than for the economy as a whole (16.4%, 2020) as well as services sector (13.1%, 2020).³ This sub-sector is dominantly male, with the share of female workers of 36.3%, which is the sixth lowest in the total economy and absolutely the lowest in services.⁴

The registered growth in information and communications services results mainly from computer programming as well as motion picture, television production (so called creative industries) as well as telecommunications services. In contrast, over the observed period, publishing activities (NACE 58) have faced downward trend. In 2023, publishing activities accounted for only 5.5% of registered employment in information and communication sub-sector. Over the observed period of time (2014-2023) registered employment decreased from 7,451 to 5,928 and the share in total employment decreased from 0.40% to 0.26%.⁵ The number of registered businesses also decreased from 955 in 2014 to 780 in 2022 (SORS, 2023).

¹ Graph 1: Share of employment in services sector in 2014 and 2023 (CROSO, 15+), in Annex

² Graph 2: Employment change: 2023/2013

³ Graph 3: Informal employment rate for economy and for Service sector

⁴ Graph 4: Employment structure by gender

⁵ Table 1: Registered Employment in Publishing activities 2014-2023

Publishing activities are particularly affected by digital transformation. Print media (dailies and periodicals) in Serbia followed globally universal trend resulting in decline in readership followed by decreasing advertising revenues, which led to downsizing and/or closures of a number of businesses. Book publishers were affected by digitalization in similar manner, which along with privatization of previously state owned companies resulted in book market consolidation (decreased number of businesses). Digitalization and the new technologies (e.g. mobile devices, AI) also contributed to decreasing number of people needed to complete specific tasks in publishing. For example, mobile journalism has allowed journalist to make interview, take pictures (no need for sending photographs), while AI is used for transcribing, translating, text and picture editing and similar. On the other hand, software publishing was growing, yet not as fast as other creative industries, such as computer programming as well as motion picture, television production (so called creative industries), as well as telecommunications services. Publishing is dominantly private, with the exception of two big book publishing companies. For understanding the state of collective bargaining it is also important to note that print media are private, yet a few print media outlets were fully privatized only recently (over the last few years, even months), thus at certain degree still retaining the culture of collective bargaining and relatively strong trade unions.

II. Current state of collective bargaining

Collective bargaining in publishing in Serbia is decentralized, while bargaining coverage is very low. Estimated bargaining coverage of about 10% is achieved primarily owing to the two public book publishers, namely “Zavod za izdavanje udzbenika” (Zavod) and “Sluzbeni Glasnik”. In both cases representative trade unions signed CBAs on company level with the company general managers as well as relevant representatives of the Government, i.e. Minister of Education and Minister of Economy, respectively.

In total, the two companies employed around 520 employees in 2023 (around 150⁶

⁶ Zavod za udzbenike gotovo nestao sa trzista, da li mu se blizi kraj? 13.11.2023., (Predrag Popovic), available at: <https://n1info.rs/vesti/zavod-za-udzbenike-gotovo-nestao-sa-trzista-da-li-mu-se-blizi-kraj/>

in Zavod and around 368 in Sluzbeni Glasnik⁷), which is around 9% of registered employment in NACE 58 (5,928, according to CROSO, 2023). In addition, “Magyar Szo”, a print media publisher for Hungarian minority, has also signed CBAs on company level⁸, covering around 100 employees. “Politika” is one of a few previously state owned print media publishers fully privatized in 2024, with four to five trade unions on company level. However, their membership is low, thus making their position in collective bargaining rather weak⁹. “Novosti AD” is another example of print media publishers privatized in 2019, with a relatively strong trade union on company level. In general, trade unions are strongest in companies with longer tradition of unionization (previously state-owned companies, and public companies) as well as in the companies whose workforce average age is higher. Younger generations of workers show rather strong disbelief in trade unions and their activities in general and thus withhold from membership. Job characteristics along with flexible work contracts also limited possibilities for unionization and collective bargaining at company in publishing. Namely, many journalists, photographers and other professionals in print media are freelancers, working for various publishers on atypical work contracts and are thus not regarded employees and not eligible to participate in collective bargaining. On the other hand, in print media, book publishers as well as software publishing companies flexible work envisages also work from home, thus leaving the employees without much opportunities to meet and discuss issues in common potentially leading to unionization and collective bargaining.

On sectoral level, there is one representative trade union for Information and communication sub-sector – Trade union of workers employed in graphic, publishing, information and motion picture production in Serbia, affiliated with Confederation of Autonomous Trade Unions of Serbia. However, though small in number of registered employed and businesses, publishing (NACE 58) is rather diverse in terms of jobs, skills and employment status of engaged workforce. Namely, print media outlets mainly face similar issues as other media houses (television, radio, online). Therefore, in addition to the above mentioned sectoral

⁷ Sluzbeni glasnik - Izvestaj o poslovanju za 2023, p. 22, available at: https://www.slglasnik.com/sites/default/files/pdf/o_nama/IZVESTAJ_O_POSLOVANJU_2023.pdf

⁸ Izveštaj o pregovorima u “MAGYAR SZÓ” DOO, 9.7.2024., available at: <https://nezavisnost.org/izvestaj-o-pregovorima-u-magyar-szo-doo/>

⁹ Interview with a stakeholder in publishing sector

trade union, media workers (including journalists, but also photographers, photo-reporters etc.) have formed other relevant trade unions both on sectoral as well as company levels. On sectoral level, there is one representative trade union for media workers, affiliated with UGS Nezavisnost (Sectoral level trade union in culture, arts and media) as well as another trade union whose representativeness was never claimed – SINOS (Trade Union of Journalists in Serbia, member of both European and International Federations of Journalists, EFJ and IFJ)¹⁰. On company level, only previously mentioned “Politka” and “Novosti AD” have established trade unions. Apart from it, two private print media companies, “Danas” and “Nin” have also established trade unions¹¹.

Publishing sub-sector diversity is also reflected on the side of employers. While there are a few media associations (not exclusively related to print) as well as one association of book publishers, these have not claimed representativeness and not eligible for sectoral collective bargaining. Moreover, most of these associations have never expressed interest in collective bargaining. On the other hand, print media and book publishers are not adequately represented in Serbian Association of Employers (SAE), as most of them are not among its members. In the last few years public narrative on the importance of sectoral collective bargaining in media has been growing yet primarily among journalists, media workers and their associations as well as civil society sector and international organizations including OSCE in Serbia. Yet, the main obstacle is found in the fact that there is no relevant “other party” to negotiate with, due to inexistence of representative employers’ association in the media sphere.

III. Challenges to collective bargaining

The main challenges to collective bargaining in publishing are related to private sector. The challenges mostly derive from low presence of trade unions, low

¹⁰ Sindikalno mapiranje, 7.5.2020., available at: <http://www.sinos.rs/srpski/sindikalni-objektiv/12/2020/06/13/5992/sindikalno-mapiranje-i.html>

¹¹ Kolektivni ugovor – jedina garancija boljeg položaja novinara i medijskih radnika, 29.12.2022. (Sladjana Dimitrijevic), available at: <https://www.uns.org.rs/sr/desk/Sindikalne-teme/140161/kolektivni-ugovor--jedina-garancija-boljeg-polozaja-novinara-i-medijskih-radnika.html?print=true>

membership and employers' hostility toward collective bargaining. Privatization of media in Serbia from 2008 to 2014 resulted in closure of at least 50 trade union organizations on company levels. Not only it has resulted in decreasing number of membership but it also stands as yet another proof of the generally negative attitudes of the employers (and media owners in particular) toward unionization of workers. SINOS research through years shows that media owners in Serbia even prohibit establishment of trade unions on company level, despite of the fact that unionization of workers is guaranteed by the Constitution and Labour Law. Moreover, in small local media outlets this problem seems particularly emphasized as journalists report that "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".¹²

In book publishing however, the two largest companies that are still public have established trade unions at company level and have company CBAs signed. In accordance, challenges to collective bargaining differ among public and private companies. While in public sector, low membership coupled with low interest of employees (particularly younger generations) may be viewed as the main challenges, in private sector the challenges are primarily related to low interest of private owners in collective bargaining. In small companies, employers' support toward unionization and collective bargaining may be of crucial importance. Yet the reality is that many private owners practice various methods (more or less subtle) to discourage (or even prohibit) unionization. Finally, regarding software publishing companies, their specific characteristics hinder possibilities for unionization and collective bargaining. These are rather small companies, engaging mostly younger workers, on both permanent and temporary work contracts but also applying flexible work arrangements (e.g. work from home), or atypical work contracts (without employment status). All these characteristics, as previously noted, are not particularly favourable for advocating unionization and collective bargaining on company level.

¹² Kolektivni ugovor – jedina garancija boljeg položaja novinara i medijskih radnika, 29.12.2022. (Sladjana Dimitrijevic), available at: <https://www.uns.org.rs/sr/desk/Sindikalne teme/140161/kolektivni-ugovor--jedina-garancija-boljeg-polozaja-novinara-i-medijskih-radnika.html?print=true>

Therefore, it is evident that though small by both the number of employees and businesses, the publishing sector is rather diverse. In line with it, sectoral collective bargaining should rather be focused on media in general (including print media, but also other media workers) while collective bargaining in book publishing could also be related with other specific sub-sectors facing similar problems rather than publishing in general (e.g. arts and culture: NACE 91 - libraries, archives, museums and other cultural activities). In some sub-sectors, including software publishing in particular, the relevance of sectoral bargaining may be questioned.

In print media publishing, as well as in media in general, the main challenges to collective bargaining on sectoral level are related with questioned representativeness of trade unions as well as low interest of employers (i.e. media owners). Available data show that only about 60% of media workers are employees as many of them are engaged on atypical working contracts not granting the employment status and participation in collective bargaining. Additionally, the official statistics does not provide data on employment in media, and therefore it is hard to claim representativeness (10% of total employment in the sector)¹³ while only representative trade unions are eligible to participate in collective bargaining. On the side of employers, apart from not being associated in representative employers' associations, as discussed before, many media owners in Serbia strongly oppose any ideas of unionization of workers and collective bargaining.

In sum, like in many other private sectors in services (e.g. financial, commerce) challenges to collective bargaining on both company and sectoral levels are mostly related to low union presence, small membership, low interest of employers in collective bargaining, and union busting. On the side of public companies, these challenges mainly result from low interest of younger workers to unionize, as mostly middle age and older employees on permanent contracts are trade union

¹³ Labour Law, Official Gazette of RS, Nos. 24/2005, 61/2005, 54/2009, 32/2013, 75/2014, 13/2017-Decision of the CC, 113/2017 and 95/2018 - authentic interpretation (article 220)

members. Fragmentation and low collaboration among trade unions at company levels were also sometimes seen as challenges to collective bargaining in public sector, yet it seems that trade unions started to collaborate more intensively to increase their overall negotiations power.¹⁴

IV. Towards Smart Bargaining

Smart bargaining in publishing is primarily related to activities directed at creation of new actors, i.e. establishment of trade unions at company level in numerous print media, establishment of new employers' associations as well as creation of better trust between the actors. Raising employers' interest in collective bargaining is of crucial importance both on the company and sectoral levels.

Existing trade unions need to enlarge their membership by developing trust among younger generation of employees. To achieve representativeness of trade unions and their eligibility to bargain over CBAs both on the company (15% of employed workers), and sectoral (10% of employed in the sector) levels tradition in workers unionization should be further promoted among younger workers. Their potentials and capacities to protect collective rights need to be strengthened, to assure continual provision of improved working conditions and enhance job security in light of technological as well as wider social and economic changes. In line with that actual collective agreements need to be reconsidered for improvement of content. Smart collective bargaining leads to better agreements, assuring trust between the parties and making the most effective regulation of working conditions.

Collective bargaining is believed to be the best way to regulate working conditions. Smart bargaining assumes frequent consultations and flexibility in changing the content of agreed CBAs. Wider promotion of bargaining culture and raising awareness that negotiations are the most effective way of dealing with opposing interests and problem solving make an important step in smart bargaining. However, development of mutual trust among the parties as well as a strong belief that negotiations would lead to a mutually beneficial agreement (win-win solution) remain the corner stone of smart negotiations in general as well as in publishing.

¹⁴ Interview with a stakeholder in publishing sector

V. European Perspectives

Sharing EU perspectives through various projects is highly welcome yet not many trade unions in publishing in general as well as in print publishing (and media) have opportunities to participate in the EU projects. These are mainly related to professional associations, rather than trade unions, except UGS Nezavisnost as well as SONOS who have connections and share their experiences with the EU partners. For example, Germany, Sweden and Norway are good examples as in each of those countries trade unions of media companies have signed sectoral CBAs, and there is a lot of space for Serbian print publishers as well as media in general to learn from it.

VI. Conclusions

Collective bargaining in publishing sector is company related. Bargaining coverage is rather low. Around 10% bargaining coverage is achieved primarily owing to existing big public book publishers. On the other hand, collective bargaining and company CBAs in private sector are less evident, and mainly connected with print media publishers.

Private media publishers with established trade unions are few. In addition to “Danas”, “Nin”, “Magyar Szo” and maybe a few more, only recently privatized media still have relatively strong trade unions (e.g. “Novosti” and “Politika”). However, private owners’ rather negative attitudes toward unionization and collective bargaining may eventually lead to further diminishing of unions’ bargaining power unless proper actions are created to attract new membership and build trust among actors.

In line with it, smart bargaining in publishing should primarily focus on finding strategies of attracting new members and convincing employers that collective bargaining is mutually beneficial for both parties, the employees and employers.

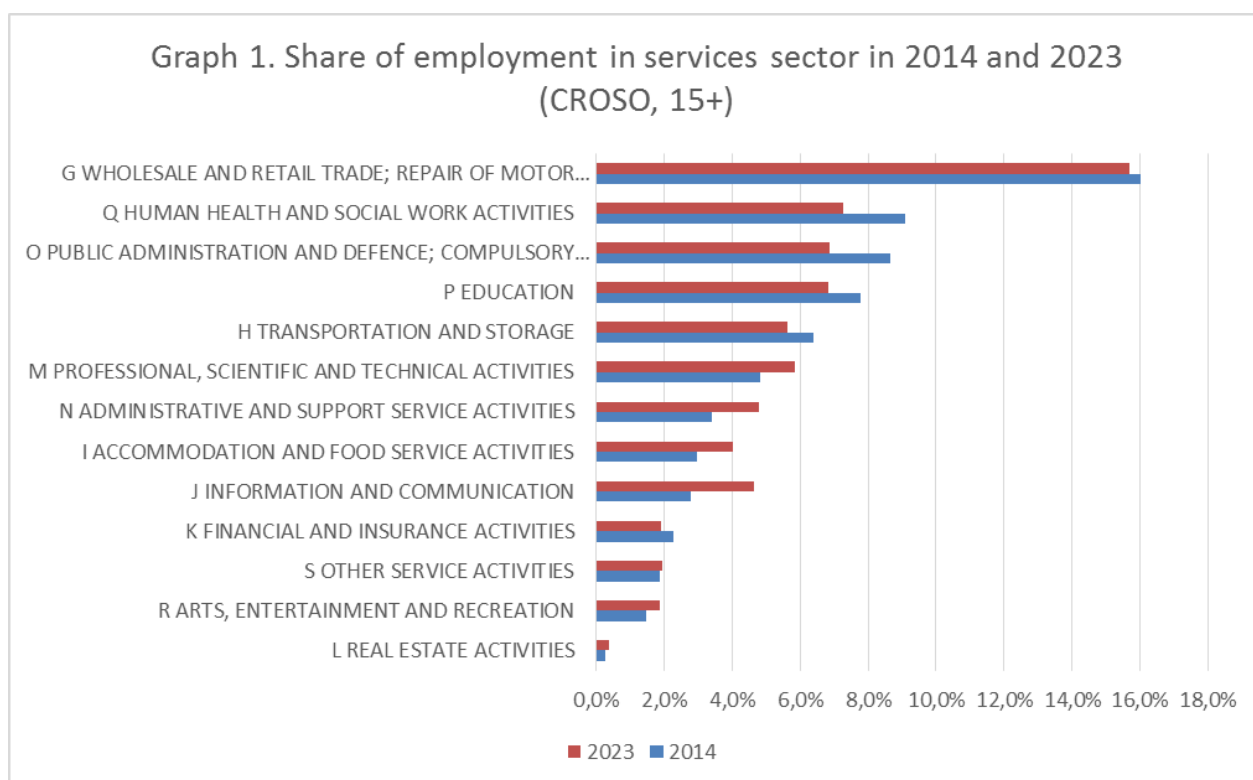
Smart bargaining in publishing should be directed at development of trust among the two parties, and convincing employers that it is in their best interest to negotiate frequently and change CBAs content in line with envisaged changes in

technology and social environment. Promotion of company level collective bargaining could also be used to encourage employers to establish new associations. Once representative these associations may become a relevant partner for sectoral collective bargaining. While sectoral bargaining may be viewed less important and harder achievable in book and software publishing, it is found particularly important in print media publishing (along with other media as well). To achieve it, sectoral trade unions in Serbia can learn from the EU perspectives, while collaborating with social partners in the EU countries where sectoral level collective bargaining in media is already well developed (e.g. Norway, Germany and Sweden).

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Annex



Graph 2: Employment change 2023/2013

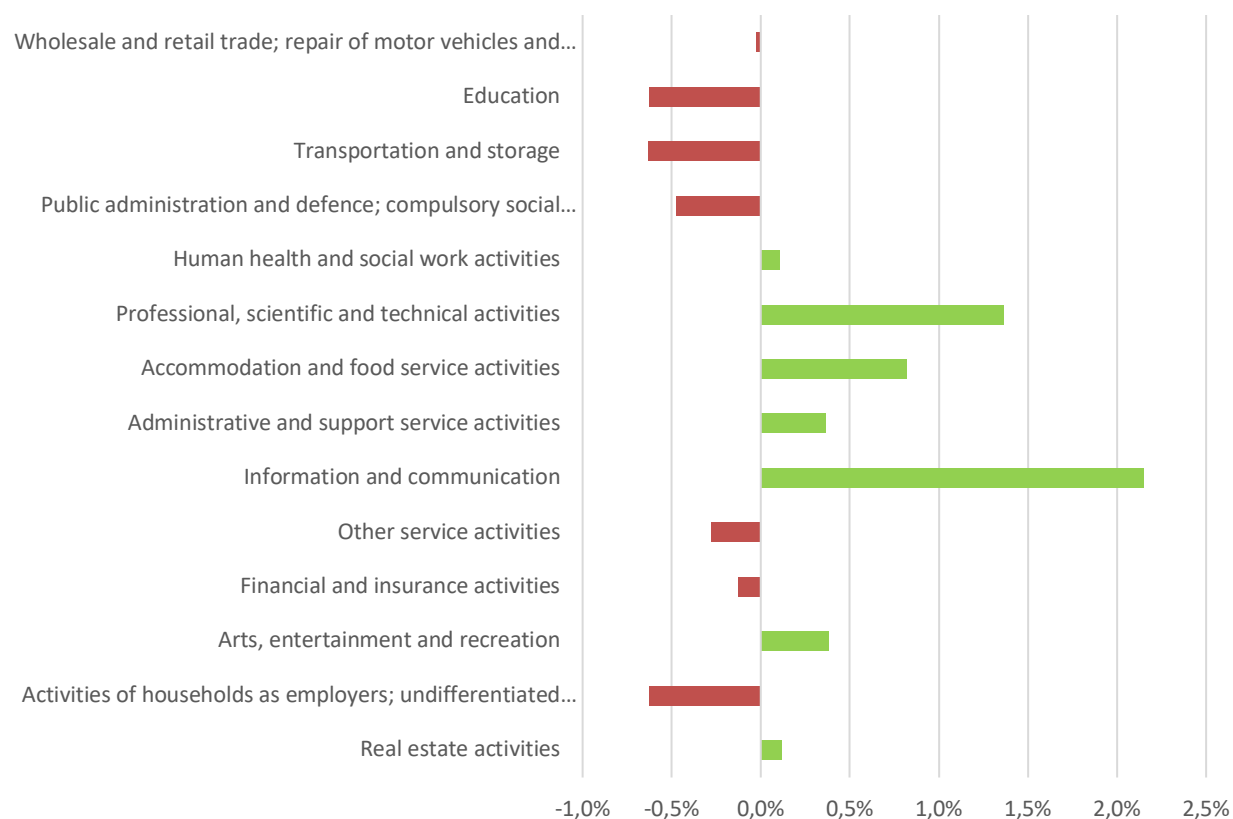
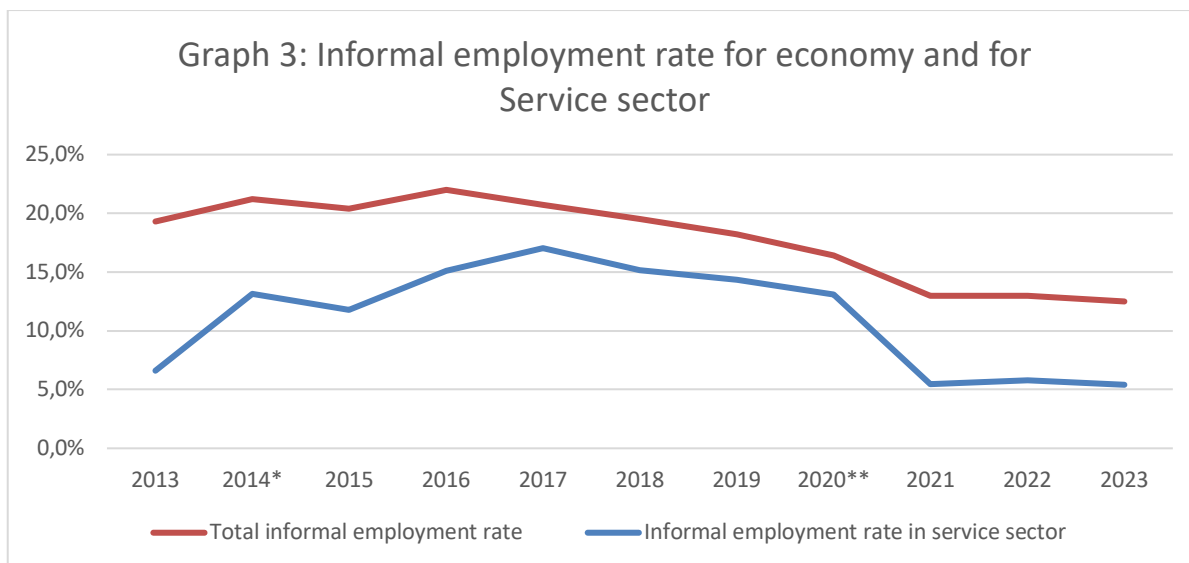


Table 1: Registered Employment in Publishing activities 2014-2023

Publishing (NACE 58)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Registered employment	7451	7332	6978	6650	6550	6628	6417	6503	6527	5928
Share in total employment	0,40%	0,39%	0,36%	0,34%	0,32%	0,32%	0,30%	0,29%	0,29%	0,26%



* ** Change in methodology

