

# BARSERVICE

## Towards smart bargaining in the publishing sector in France

Author: Diletta Porcheddu

2024



The project is funded by the European union, project No. 101126532

Table of contents

Executive summary ..... 1

I. Methodology.....2

II. Sector identification and trends.....2

III. Current state of collective bargaining.....3

IV. Challenges to collective bargaining.....4

V. Towards Smart Bargaining .....5

VI. European Perspectives.....6

VII. Conclusions.....6

References.....7

## Executive summary

This report reviews key trends and challenges and explores the current state of collective bargaining in France's publishing sector.

### Key Trends

The French publishing sector is a dynamic part of the information and communication industry, employing a small but significant share of its workforce. Bookselling has experienced a post-pandemic growth, while the press sector is facing a prolonged decline in print media revenues. Digital consumption continues to reshape the industry, driving structural changes.

### Collective Bargaining Structure

France's collective bargaining system is highly centralized, with industry-level agreements providing a strong regulatory framework complemented by increasingly autonomous company-level agreements. State mechanisms like agreement extensions ensure extensive coverage despite low unionization rates. Sector-specific agreements, including those for books, magazines, and journalists, offer tailored frameworks for addressing employment conditions.

### Key Challenges

The sector faces several pressing issues. The predominance of small companies limits union representation and the negotiation of company-level agreements. Rapid changes in professions, particularly in digital and marketing roles, are inadequately reflected in existing agreements. Freelance workers suffer from a lack of formal recognition and fair remuneration, while the financial challenges of transitioning from print to digital intensify pressures on employers and workers alike.

### Path Forward

To navigate these challenges, collective agreements must be modernized to account for emerging professional roles and qualifications, with public subsidies tied to compliance. Vocational training programs require enhanced funding and cross-sectoral integration to support workforce adaptability. European-level cooperation can bolster union strategies, particularly in addressing shared challenges across member states. Adopting smart bargaining techniques and fostering innovation will further enable the sector to meet evolving demands.

### Conclusion

The French publishing sector faces several challenges linked to digitalization, heavily

impacting the press/newspaper business, while bookselling remains stable. Outdated collective agreements fail to address evolving professional roles and technologies like AI. However, modernization and international collaboration can become key to navigating these changes.

## I. Methodology

This report has been drafted through the conduction of desk research, carried out through the consultation of scientific and grey literature on the topic of collective bargaining, together with statistical data concerning employment trends in the French publishing sector.

## II. Sector identification and trends

According to the French national statistical institute, 3,5% of French workers (1.014.000) were employed in the information and communication sector in 2023. The sector has a primarily male workforce, and the most represented age group is that of 25-49 years old (Insee, 2024a). Unfortunately, Insee does not propose more detailed data targeted specifically on the publishing sector, which needs to be analyzed taking into account the two main industries composing it, i.e., the bookselling industry and the press/newspaper business. Insee data needs therefore to be complemented with sources linked to sector-specific actors.

For what concerns the bookselling industry, only 14.200 workers in France were employed in the sector in 2022 (Livremploi, 2024). However, bookselling has experienced a significant growth if compared to the pre-pandemic period: if we compare 2023 with 2019, the pre-pandemic 'reference' year, the book market appears to be up by 4.9% in value and 1.1% in volume (SNE, 2024).

The strong development of digital publishing over the last few years has not been fatal to the book market economy, accounting for 10.12% of publishers' sales in 2023. 65,7% of digital publishing sales are concentrated on professional and academic works, while only 13,3% of digital publishing concerns works directed to the general public (SNE, 2024).

With concern to the press sector, it is to be noted how the written press, whether in print or digital format, remains the leading source of information in France.

In 2020, the press sector included almost 10.500 newspaper publishing companies (7%), magazine and periodical publishing companies (23%), and press agencies (9%), as well as 6,900 companies specialising in the retail sale of newspapers and stationery (61%) with a workforce of around 48.000 full-time workers. Total revenues for these companies amount to 9.9 billion euros (Ministère de la Culture, 2023)

Digitalization of the press constitutes a stable trend: more than half of French citizens consult newspapers and magazines online (Statista, 2024).

Similarly to what happened in other European countries, the abandonment of printed press by the French public has led the press sector towards a conjunctural and structural crisis, lasting now for several years. Over the last decade, the added value of the print media has fallen by 31%, from 5.9 billion euros in 2011 to 4.1 billion euros in 2021. While print media was the second largest cultural sector in 2000, its share among all cultural sectors has fallen from 18% to 9% in 2021 (Ministère de la Culture, 2023).

### III. Current state of collective bargaining

Collective bargaining in France is organized in a two-tier system, with industry-level collective agreements regulating most aspects of employment and working conditions, and company level collective agreements integrating their provisions. Cross-industry collective agreements are also a crucial part of the French collective bargaining system, regulating specific employment aspects (i.e., telework) through provisions applicable in all sectors of the economy.

The French collective bargaining system can still be defined as centralized, despite company-level collective bargaining experiencing an increasing autonomy from industry-level collective agreements over the last years, together with a general weakening of the favorability principle (Vincent, 2019).

Contrary to other Western European countries, the state plays a very important role in supporting the French industrial relations system, especially through the frequent use of extension mechanisms, directly impacting the scope of application of collective agreements (Vincent, 2019).

The frequent use of extension mechanisms by the French Ministry of Labour contributes to explain the very high collective bargaining coverage in France (98% in 2018) despite the below-average unionization rate (10,8% in 2016). The three main trade unions in France (CGT, CFDT and FO) account for 80% of total union membership (Vincent, 2019). The employer representation rate is, surprisingly, much higher (79.2% in 2017) (OECD/AIAS, 2018)

The main union actors of the French publishing sector are affiliated to the main trade unions mentioned above. For CGT, FILPAC (Fédération des travailleurs des industries du livre, du papier et de la communication), and SGLCE (Syndicat général du livre et de la communication écrite) can be mentioned. For CFDT, SNLE (Syndicat des professionnels du livre et de l'édition) is the primary actor in this sense and the most representative union in the sector. SNPEP (Syndicat National de la Presse, de l'Edition et de la Publicité) can be listed as the main actor for FO.

As for what concerns managers and professionals, the main trade union covering this kind of workers (CFE-CGC - Confédération française de l'encadrement - Confédération

générale des cadres) also includes some federations active in the publishing world. The three main French trade unions also dispose of specific sections dedicated to journalists (CGT Journalistes, CFDT Journalistes, FO Journalistes). As for what concerns employers' organizations, the main actor in the publishing sector is the Syndicat national de l'édition, representing book publishers. For what concerns the press business (newspapers, magazines), the main employers' organizations are the SEPM (Syndicat des éditeurs de la presse magazine), the Alliance de la presse d'information Générale, the Fédération Nationale de la Presse d'information Spécialisée, the Fédération Française des Agences de Presse. The main industry-level collective agreement covering the publishing sector in France is the "Convention collective nationale de l'édition", signed on January 1<sup>st</sup>, 2000. Journalists are covered by a specific collective agreement, signed first in 1976 and extended in 1988 (Convention collective nationale des journalistes). In 2017, an additional collective agreement has been signed, covering workers and managers of publishing firms specialized in magazines (Convention collective nationale des éditeurs de la presse magazine). This last agreement has been extended in 2019.

#### IV. Challenges to collective bargaining

One of the most relevant challenges concerning collective bargaining – and union activities as a whole – is the averagely small dimension of companies. In France, 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) (Insee, 2024b). Smaller companies are more difficultly permeated by trade unions, and therefore often to not dispose of company-level union representatives who could negotiate company-level agreements.

Delving more into the specific challenges for unions and collective bargaining in the publishing sector, it is to be noted how, on September 12, 2024, the results of the États généraux de l'information (General Assembly on Information) have been presented at the European Economic and Social Committee. This initiative had been launched by President Macron in October 2023, and was aimed at drafting an action plan concerning the safeguarding of the information sector in France, through the contribution of relevant stakeholders.<sup>1</sup>

Among the consulted stakeholders, sectoral trade unions played an important role, presenting lists of inputs and requests to the Assembly, which contribute to drafting a detailed picture of the publishing sector as a whole.

In the list of propositions issued by the FILPAC CGT, the issue of updating the content of collective agreements acquires a significant role. In fact, the union underlines how

---

<sup>1</sup> For additional information, please consult the following website: <https://etats-generaux-information.fr/>

the professions and qualifications related to advertising, information systems, marketing, digital and paper distribution are changing rapidly, as are those of editorial staff, but often publishers do not include these elements (and their respective pay scales) in their collective agreements.

Strongly related to the issue of new professions and qualifications is that of vocational training for publishing workers, which is considered by the union to be usually dealt with a “Silo management” mentality – i.e., characterized by a lack of information sharing and useful cooperation – thus preventing adequate professional development and job retention for information workers.

Moreover, false self-employment appears to be a relevant problem in the sector, given that one of the main propositions by the union is that of cancelling subsidies to publishing companies that do not respect labour law provisions concerning employment and self-employment. Several proposals in the FILPAC list are also directed at freelance workers, who are described as in need of a recognized status and fair remuneration.

The list also includes propositions dedicated to wage equality, environmental sustainability and early retirement schemes for publishing workers with strenuous jobs (FILPAC CGT, 2024).

## V. Towards Smart Bargaining

The framework described in the previous paragraphs indicates digitalization as the most relevant challenge to be tackled by social partners of the French publishing sector. Therefore, to make publishing collective agreements “smart”, their content must be updated to reflect the new reality of the sector.

As suggested by FILPAC CGT, the adaptation of classification and qualification systems is a fundamental element for building trust between the workforce and the trade unions – which would thus show awareness of the current changes in the sector – and to provide them with an economic compensation coherent to their abilities and competencies. Moreover, modernizing vocational training would allow workers to acquire both hard and soft skills to efficiently navigate the transformations in the world of publishing and its ever-changing labour market.

The proposals of FILPAC to tackle these issues are those of reducing press subsidies for publishers whose collective agreements do not consider the new professions and qualifications emerging in the sector, and increasing the state-issued resources directed at the relevant vocational training entity (OPCO AFDAS – Operateur des Compétences for the creative sector) to help build bridges between professions and jobs in the different media and cultural sectors (FILPAC CGT, 2024).

## VI. European Perspectives

The Directive on Adequate Minimum Wages has not been transposed into French law yet, despite the deadline being already expired (15 November 2024). However, a draft legislation is currently under discussion (ETUC, 2024). The draft law is expected to impact the current legislation concerning the statutory minimum wage in France (Salaire Minimum Interprofessionnel De Croissance – SMIC).

Nevertheless, the French legislator will not need to implement an action plan aimed at increasing collective bargaining coverage – as per art. 4 par.2 of the Directive – since the coverage rate currently surpasses the minimum threshold identified by the Directive itself (80%).

European-level social partners of the publishing sector might support French unions in the organization of strategies and initiatives to update the content of collective agreements and increase unionization rates in the sector – also through the enhancement of cross-border cooperation among unions active in the publishing sector of other Member states, which are facing similar challenges.

It is to be noted, however, that currently there isn't a European-level trade union specifically dedicated to the publishing sector – exception made of EFJ (European Federation of Journalists), which however covers only a small part of the sector's workforce.

UNI Entertainment, Media and Arts (part of UNI Europa), despite being more focused on the audiovisual side of media, has however recently put in place initiatives targeting publishing sector unions, aimed at strengthening their organizing efforts.<sup>2</sup>

## VII. Conclusions

The French publishing sector is undergoing significant transformation, with digitalization emerging as the key phenomenon shaping its trajectory. This shift has had a particularly adverse impact on employment levels and economic growth in the press and newspaper industry, which has struggled to adapt to the decline of print media and the rise of digital platforms. Conversely, the bookselling industry has proven more resilient, with its market remaining relatively unaffected by digitalization, as evidenced by stable growth in post-pandemic years.

Despite France's high collective bargaining coverage – largely supported by state-backed extension mechanisms – the existing collective agreements in the publishing sector lack the adaptability needed to address the challenges posed by digitalization. Specifically, these agreements often fail to adequately reflect the evolving nature of jobs

---

<sup>2</sup> For more information, please consult the following webpage: <https://www.uni-europa.org/news/another-interactive-step-by-step-session-on-building-capacity/>



and qualifications in the sector, leaving classification systems and vocational training paths outdated and insufficiently aligned with current and future needs.

To enhance the effectiveness and relevance of collective agreements, their content must be modernized to account for the rapid changes in professions and technologies shaping the publishing landscape, including the increasing use of artificial intelligence. Updating these agreements to better capture the realities of digital transformation is critical.

Additionally, fostering mutual cooperation and sharing best practices with publishing sector actors in other countries could provide valuable insights to French trade unionists. Initiatives led by European-level social partners can play a pivotal role in facilitating cross-border collaboration and helping the French publishing sector to navigate this period of profound change more effectively.

## References

ETUC (2024). Minimum wage and collective bargaining systems in Europe, France <<https://wage-up.etuc.org/france>>

FILPAC-CGT (2024). États généraux de l'information, les propositions de la Filpac <<https://www.filpac-cgt.fr/etats-generaux-de-linformation-les-propositions-de-la-filpac/>>

Insee (2024a). Emploi, chômage, revenus du travail, Édition 2024 <<https://www.insee.fr/fr/statistiques/7767045?sommaire=7767424>>

Insee (2024b). Caractéristiques de l'industrie selon la taille des entreprises. Données annuelles 2022 <<https://www.insee.fr/fr/statistiques/2020000>>

Livreemploi (2024). Secteur de l'édition <<https://www.livreemploi.fr/secteur-edition>>

Ministère de la Culture (2023). Chiffres clés, statistiques de la culture – 2023 <[https://www.culture.gouv.fr/Media/medias-creation-rapide-ne-pas-supprimer/Chiffres-cles-2023\\_DEPS\\_Presse-e-crite\\_Fiche.pdf](https://www.culture.gouv.fr/Media/medias-creation-rapide-ne-pas-supprimer/Chiffres-cles-2023_DEPS_Presse-e-crite_Fiche.pdf)>

OECD/AIASS (2018). Main indicators and characteristics of collective bargaining, France <<https://web-archive.oecd.org/temp/2021-02-17/580072-collective-bargaining-database-France.pdf>>

Statista (2024). La presse en France – Faits et chiffres <<https://fr.statista.com/themes/3688/la-presse-en-france/#topicOverview>>

Vincent, C. (2019). France: the rush towards prioritising the enterprise level, (eds. Müller

T., Vandaele K., Waddington J.) Collective bargaining in Europe: towards an endgame, ETUI

<<https://www.etui.org/sites/default/files/Collective%20Bargaining%20Vol%20I%20final%20web%20version.pdf>>