

# BARSERVICE

## Towards smart bargaining in the publishing sector in Italy

Author: Diletta Porcheddu

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## Executive summary

This report reviews key trends and challenges in Italy's publishing sector, divided between the bookselling and newspaper industries, and explores the current state of collective bargaining.

### Key Trends

Italy's bookselling industry has grown post-pandemic, becoming the country's leading cultural industry in consumer spending. In 2022, published works and distribution volumes rose, placing Italy fourth in Europe. On the contrary, the newspaper sector continues to decline due to competition from digital news outlets, with a 4-5% annual drop in print sales since 2008. This trend has led to significant job losses, as companies struggle to adjust to a digital-first readership.

### Collective Bargaining Structure

Italy's multi-level collective bargaining system covers most publishing workers through sectoral agreements, while a few companies also use decentralized agreements for performance-based remuneration. However, contractual dumping remains a significant challenge, with non-representative agreements undermining fair competition, especially in digital publishing.

### Key Challenges

Economic constraints and the small size of many companies prevent effective company-level bargaining, limiting wage and benefit flexibility. Moreover, current sectoral collective agreements still reflect outdated professional roles and business structures, failing to address digital transformation needs.

Lastly, limited labor inspectorate resources hinder effective enforcement against practices like contractual dumping.

### Path Forward

Updating collective agreements to include new professions arising from the digital transformation, introducing territorial bargaining to ensure decentralized collective bargaining coverage in smaller firms, and increasing government support could help stabilize the industry. Additionally, learning from EU practices in areas like gender equality and worker safety could strengthen sectorial standards.

### Conclusion

Digitalization has transformed Italy's publishing sector, especially the newspaper industry. Although collective bargaining coverage remains high, current agreements

need modernization to reflect today's professional and technological landscape and to promote fair competition.

## I. Methodology

This report has been drafted through the conduction of desk and field research. The desk research was 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 Italian publishing sector.

The field research was instead carried out through the conduction of two online interviews – one involving an Italian national-level trade unionist active in the publishing sector<sup>1</sup> [R1], the other involving an HR Manager of one of the largest Italian publishing companies [R2]. The choice of the interviewees aims to reflect the different points of view of national-level social partners on the topics of the Report.

The interviews have been carried out in Italian, and the translation of the quotes has been freely conducted by the author of this Report.

## II. Sector identification and trends

When describing the Italian publishing sector, the bookselling industry and to the newspaper business need to be explored separately, given the different economic features and recent trends characterizing those sub-sectors.

According to the Italian National Statistical Institute, the bookselling industry did not experience an economic decline in comparison with the pre-pandemic period but, in 2022, was instead characterized by relevant growth both in terms of the quantity of total book works published (+7.5 over 2019) and in terms of copies printed and distributed (+5.1%) (ISTAT, 2023). In 2022, bookselling was the first cultural industry in Italy per consumer spending and the fourth largest in Europe (AIE, 2023).

The newspaper business has instead been characterized by a steady economic decline over the years. According to recent data, the selling of individual copies and paper subscriptions of the three most important Italian newspapers (both in paper and digital format) suffered a decline of respectively 8,63%, 4,77% and 3,92% from 2023 to 2024 (ADS, 2024).

The newspaper business appears instead to be in a constant state of crisis ever since 2008, with a significant effect on employment levels in the sector – traditionally considered as labor-intensive.

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<sup>1</sup> The three main trade union federations active in the Italian publishing sector are Slc-CGIL, Fistel-CISL, Uiltec-UIL.

*"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. [...] This has caused a huge hemorrhage of workers [...] From 2008 onward, companies have used public measures to cushion the effects of unemployment and early retirement to heavily reduce the workforce, because no recipes have been found so far to reverse the trend and get publishing to grow again." [R2]*

The main reason for this declining trend has been identified by the respondent as the advent of digital news outlets, used in 2024 by 7,4 million Italian citizens (Audicom, 2024). However, the increase in internet usage and digital content development has impacted the publishing sector as a whole.

*"Printed content now travels in a smaller form than in the past, pushing even traditional publishers into the internet world. In the early years of internet development, traditional publishers did not quite understand what was going on and attempted to simply transfer printed content to the Web, but these experiments were unsuccessful. It became clear that the digital product could not be a simple transposition of the printed content." [R1]*

Digitalization can be therefore identified as the main global trend influencing employment in the Italian publishing sector.

### **III. Current state of collective bargaining**

The Italian collective bargaining system can be defined as multi-level, taking place both at sectoral and territorial/company level, and centrally organized (Leonardi and Pedersini, 2018). The Italian publishing sector follows this pattern, being covered by different sectoral-level collective agreements, regulating the employment relationship of most workers in the sector and delegating the regulation of certain topics (e.g. performance-based bonuses) to decentralized bargaining.

In the bookselling industry, the main sectoral collective agreement (CCNL Grafici Editori), signed by ANES, AIE, Assografici (employers' associations) and Slc-CGIL, Fistel-CISL and Uilcom-UIL (trade union federations), was applicable to 65665 Italian workers and 4713 Italian companies in 2023.

With concern to the newspaper business, other than the CCNL Grafici Editori, two other main sectoral collective agreements need to be taken into consideration. The first one is applicable to printing house workers specialized in newspapers (CCNL aziende editrici e stampatrici di giornali quotidiani ed agenzie di stampa) and is signed by FIEG and ASIC (employers' associations) and Slc-CGIL, Fistel-CISL and Uilcom-UIL (trade union federations); in 2023, it covered 2171 workers and was applicable to 133 companies. The second collective agreement is instead applicable to journalists (CCNL di lavoro



giornalistico), is signed by FIEG (employers' association) and FNSI (trade union federation); in 2023, it covered 9481 workers and was applicable to 1096 companies (CNEL, 2024).

Despite the high collective bargaining coverage, working conditions in the sector seem to be put in peril by the phenomenon of contractual dumping.

*"As for the newspapers we all know, they are all members of FIEG, the national employers' association that groups publishers. The real problem arises, however, with the online magazines that have sprung up in recent years, which contribute to contractual dumping in comparison to websites of bigger newspaper outlets, by applying improbable contracts to their staff [...] and employing underqualified workers. This not only impacts the quality of information, but also the publishing companies themselves, which lose business because of these practices."* [R2]

*"The problem is that there is no legal requirement to apply a specific sectoral collective agreement. For this reason, in Italy there are more than 1,000 sectoral agreements, but only 270 are signed by CGIL, CISL and UIL (n.d.r., Italy most representative confederations); many others are signed by unions with no representativeness. An emblematic example is that of private broadcasting. In addition to the contract signed by CGIL, CISL and UIL, there is another contract signed by a small trade union that offers worse conditions to workers – accounting for 30% of their wage. This creates unfair competition and needs to be resolved."* [R1]

In the newspaper sector, workers' wages and purchasing power are also damaged by the difficulties in the renewal of the sectoral collective agreements (especially that applicable to journalists), which have been at a standstill for several years.

*"The situation is so critical that there are no shared solutions between the employer and union sides, so we are not moving forward."* [R2]

It is to be noted, however, that the CCNL Grafici Editori has been renewed in December 2023, providing wage increases to a large percentage of workers of the publishing sector.

With concern to decentralized bargaining coverage in the publishing sector, official data is not available. Both interviewees, however, identified it as "scarce" (see par. III)

One last element of note concerning trends in the Italian publishing sector is the reduction of bogus self-employment and fixed-term contracts, as a consequence of targeted legislation on the matter (Law 183/2014 – so-called Jobs Act).

*"The real problem in the sector has been the excess and improper use of non-employment 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.” [R1]*

## IV. Challenges to collective bargaining

Both interviewees highlighted the scarce presence of decentralized collective bargaining in the publishing sector, though identifying two different reasons for this. From the companies perspective, the main reason is the state of crisis which is interesting publishing businesses, and therefore avoid stipulating company-level agreements with more favorable conditions to workers in comparison with those of the sectoral-level agreement, which is therefore used as a minimum-level standard for working conditions.

*“In the past, there was a committee each year evaluating performance-based pay increases, rewarding the best workers. With the crisis [...] merit-based policies have also shrunk because the necessary resources are no longer there.” [R1]*

Trade unions, on the contrary, identify the reason for the lack of company-level collective bargaining in the publishing industry in the averagely small size of companies active in the sector.<sup>2</sup> In this sense, it is worth specifying that in Italy, business size has a direct effect on the presence of decentralized bargaining, given that workers employed in companies with less than 15 workers cannot form a workers’ representative body, and cannot therefore stipulate a company-level collective agreement (Art. 35 of Law 300/1970 – Workers’ Statute).

Issues concerning the enforcement of provisions included in the main sectoral agreements for the publishing sector have been also brought up during the interviews. The reason identified for this are the scarce resources of the Italian Labour Inspectorate, which is largely understaffed and underpowered, and therefore struggles to have a real effect on the topic of contractual dumping.

## V. Towards Smart Bargaining

When asked about what could make collective agreements in publishing “smart”, both interviewees agreed upon the need to adapt the contents of the sectoral agreements to the current reality of the publishing sector. However, they had very different perspectives on the modifications to implement.

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<sup>2</sup> In fact, when considering the bookselling industry, in 2022, 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 (ISTAT, 2023).



From the companies' point of view, sectoral agreements should be revised so as to reflect the current situation of crisis that has been impacting the publishing sector for more than a decade.

*"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. Even to think that, until a few years ago, many journalists had company cars... today this is a vanished reality in almost all companies."* [R2]

From the trade union perspective, instead, the updating of classification systems in the sectoral-level collective agreements – currently considered as outdated – appears essential. This, in order to ensure their adherence to the current landscape of professional profiles emerging in publishing as a consequence of the digital transition and the overall transformation of the world of work.

*"Today, we have to focus our negotiations on roles, levels of autonomy and coordination functions. We have begun to modernize the contractual classifications, such as in the contract for editorial graphics and publishers, where we have foreseen different provisions for the editorial workers (those who produce content) and the industrial workers. This is a first step toward innovation."* [R1]

In terms of collective bargaining coverage, no significant issues have been identified with concern to sectoral-level agreements.

In order to solve the problem concerning low levels of decentralized collective bargaining (see par. II) the trade unionist proposes to adopt territorial-level bargaining in the Italian publishing sector (currently not present) so as to ensure adequate coverage of decentralized collective bargaining also to SMEs. This solution has already been adopted in various sectors of the Italian economy, such as in the craftsmanship sector (characterized by a large percentage of SMEs) and has been proposed as a viable solution for similar issues occurring in manufacturing (Porcheddu, Roiatti 2022).

Legislation reform is also considered by the interviewees as a possible tool to solve some of the issues concerning the Italian publishing sector.

These reforms would not concern, however, the relation of labour law with collective bargaining, but rather provide economic incentives to companies which do not engage in contractual dumping and generally follow legal and contractual rules. Governmental economic interventions would also be functional to "save" some publishing companies from extinction.

*"On the publishers' side, there is a call for the government to consider information as a resource for the country, perhaps investing more funds to save the major information realities. If there is no comprehensive government intervention, smaller entities will no longer*

*be able to manage the ratio of revenues to labor costs.” [R2]*

The interviewee refers to the proposal of a new Law on the publishing sector proposed to the Italian Parliament by the employers’ association FIEG in October 2024, one of whose main points is that of establishing a stable replenishing system of the “Fund for pluralism and digital innovation of information and publishing”, instituted by the Italian Ministry of Economy in 2016 (FIEG, 2024).

## VI. European Perspectives

The Directive on Adequate Minimum Wages has not had any effect yet on the Italian publishing sector, considering two main factors. Firstly, Italy does not have a statutory minimum wage, and therefore several provisions of the Directive cannot be applied in the country. Moreover, the collective bargaining coverage in Italy is superior to the 80% threshold<sup>3</sup>, and therefore the Italian government does not need to draft the action plan mentioned in art. 4 of the Directive.

To this end, it is worth mentioning how the Italian trade unionist reaffirmed the contrary position of its confederation towards the introduction of a statutory minimum wage in Italy, which, in his opinion, serves a real purpose only in those countries where industrial relations are not as well developed as in Italy.

*“Of course, one cannot expect to completely harmonize rules and wages among different countries, as contextual conditions are often very different.” [R1]*

The role of EU-level social partners in supporting collective bargaining coverage and promoting on mutual learning and cooperation among social partners of the publishing sector has not been mentioned by the interviewees.

However, both expressed themselves in favor of “importing” measures that have been proven successful in other Member States, especially on transversal topics such as gender equality and occupational health and safety. From the trade union point of view, a European-level intervention on those topics is necessary, which could nonetheless benefit from deeper discussions in the context of European Works Councils.

*“I recently attended an international event dedicated to health and safety in multinational companies, during which I realized that, although we have common European regulations, these are applied differently in different countries. On these issues, the union should strive*

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<sup>3</sup> The data concerning collective bargaining coverage in Italy can be different, given its court-based extension mechanism concerning wage provisions (Leonardi and Pedersini, 2018). In 2019, according to the [OECD/AIAS ICTWSS database](#), it amounted for 100% of employees, while according to ILOstat data it amounted to 99% of employees.



*towards more uniformity across Member states. More space should be awarded to these issues during EWCs discussions, although currently EWCs have only a consultative role.” [R1]*

The HR manager instead underlined that some initiatives adopted in other Member states to improve the economic conditions of the publishing sector cannot be applied to the Italian context, which is characterized by the population’s low propensity to reading – especially relevant among young citizens.

## VII. Conclusions

The key phenomenon interesting the Italian publishing sector is digitalization, which pushed companies to reorganize and restructure their production processes and provide different final products. This caused a negative impact on employment levels, especially in the newspaper business, while the bookselling industry does not seem to be impacted by this trend and is instead experiencing economic growth.

Despite collective bargaining coverage being quite high – especially thanks to the presence of well-developed sectoral collective bargaining – collective agreements regulating the Italian publishing sector appear not to be sufficiently equipped to face the digital transition. In addition, the phenomenon of contractual dumping – very widespread in the Italian industrial relations system – causes an unfair competitive advantage to new digital outlets in comparison with traditional press.

In order for collective agreements to become “smarter”, their content should be updated to reflect the transformations concerning new professions and the state of the labour market in publishing, for example through the creation and regulation of new business models. In this sense, mutual cooperation and learning from other countries’ publishing sector might be beneficial for the regulation of specific topics – all while taking into account national specificities.

The development of decentralized collective bargaining in publishing – currently not very widespread – seems instead to be dependent on the economic conditions of the sector, which might be helped by government intervention.

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