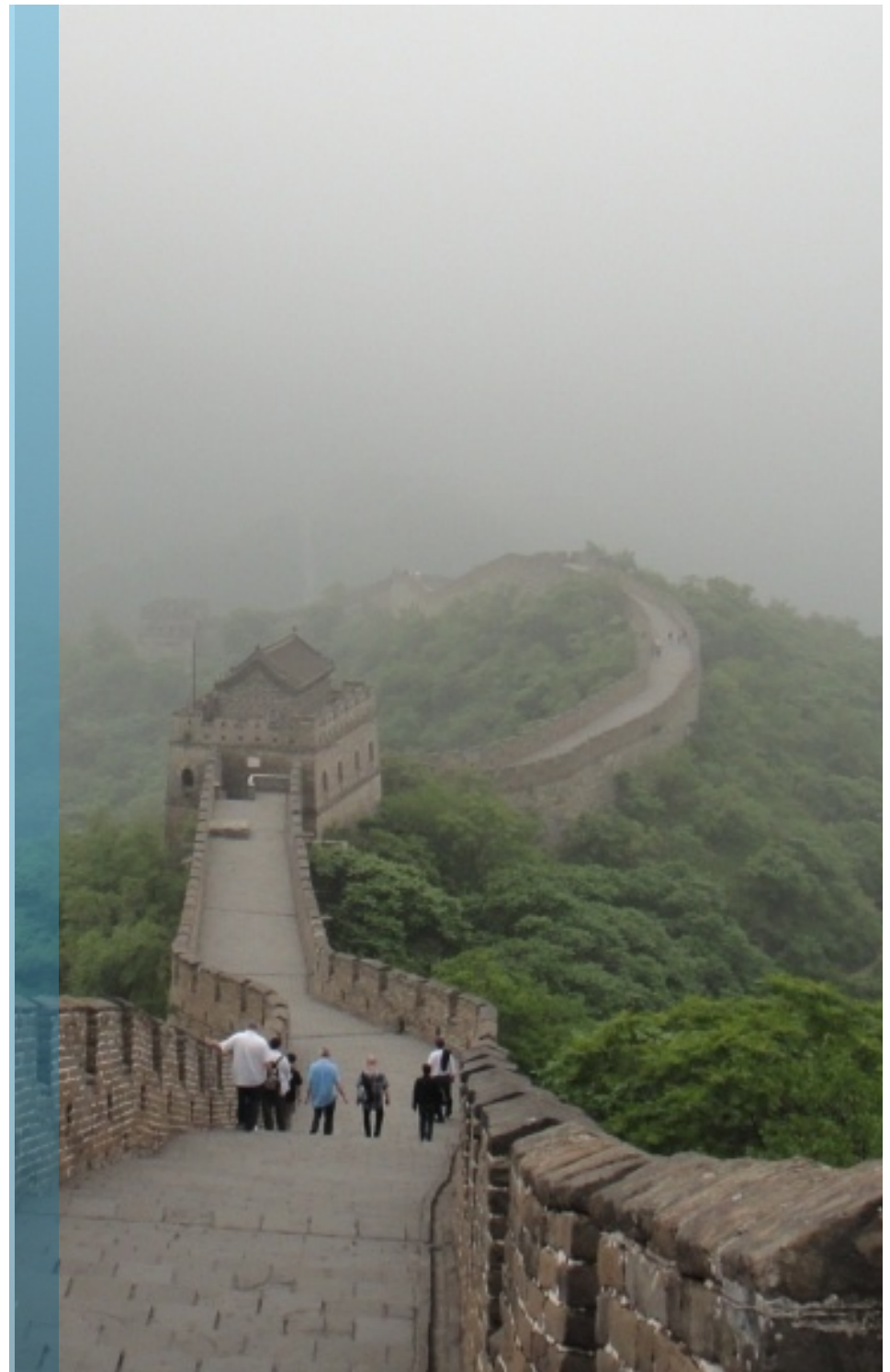


# Spotlight on China

**Steven Miron**  
**Senior Vice President, STMS**  
**John Wiley & Sons**

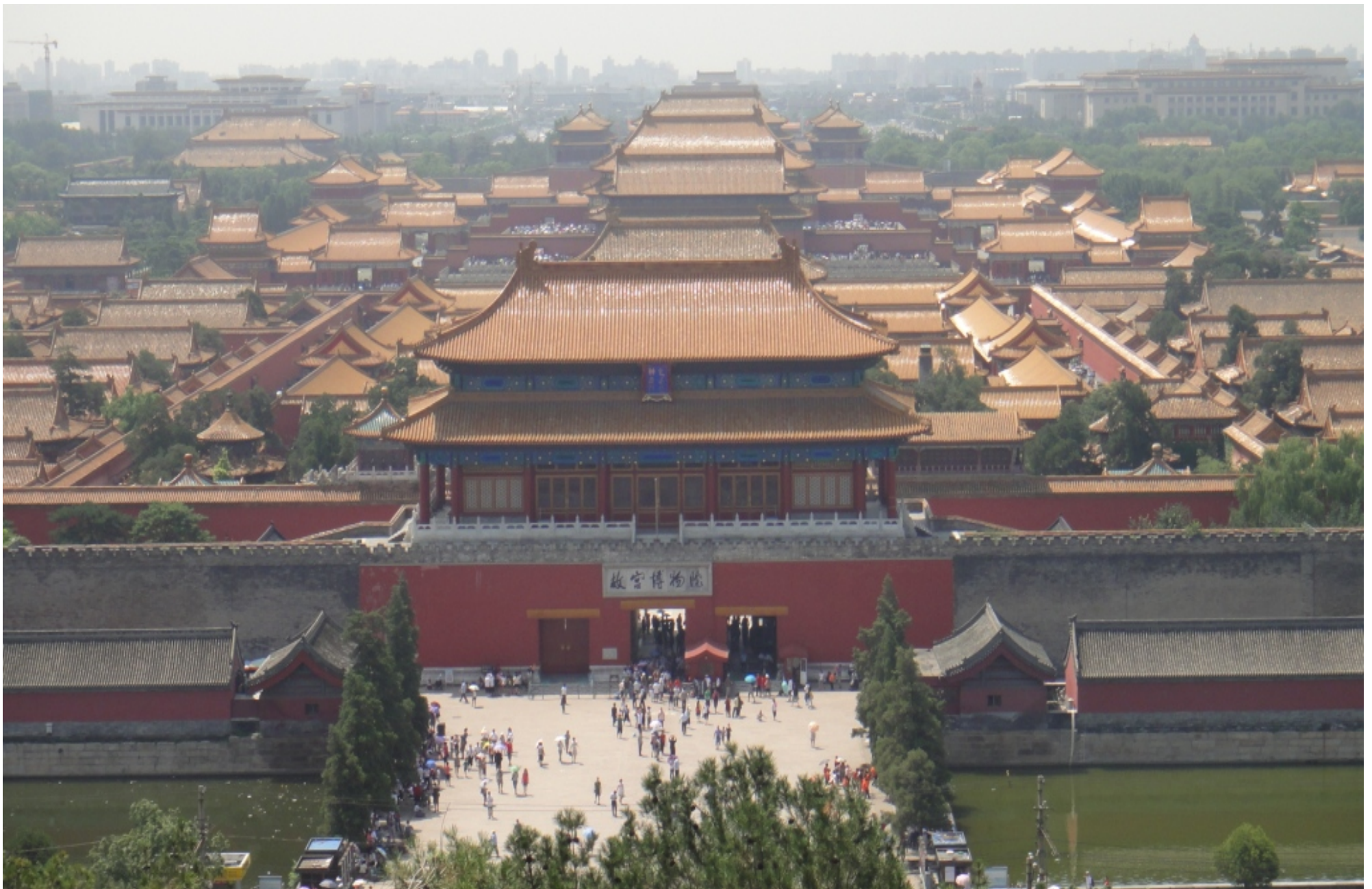
**STM Seminar, Washington DC**  
**April 27, 2011**



# Contents

- Why China?
- Three decades of change (or not)
- Challenges and opportunities
- What's a publisher to do?





**So why China?**

# China's position in the world

The world's biggest....

Property market

Energy Consumer

Energy Investor

Internet Population

Gold Buyer

Gold Producer

Exporter

Auto maker & market

The world's second biggest...

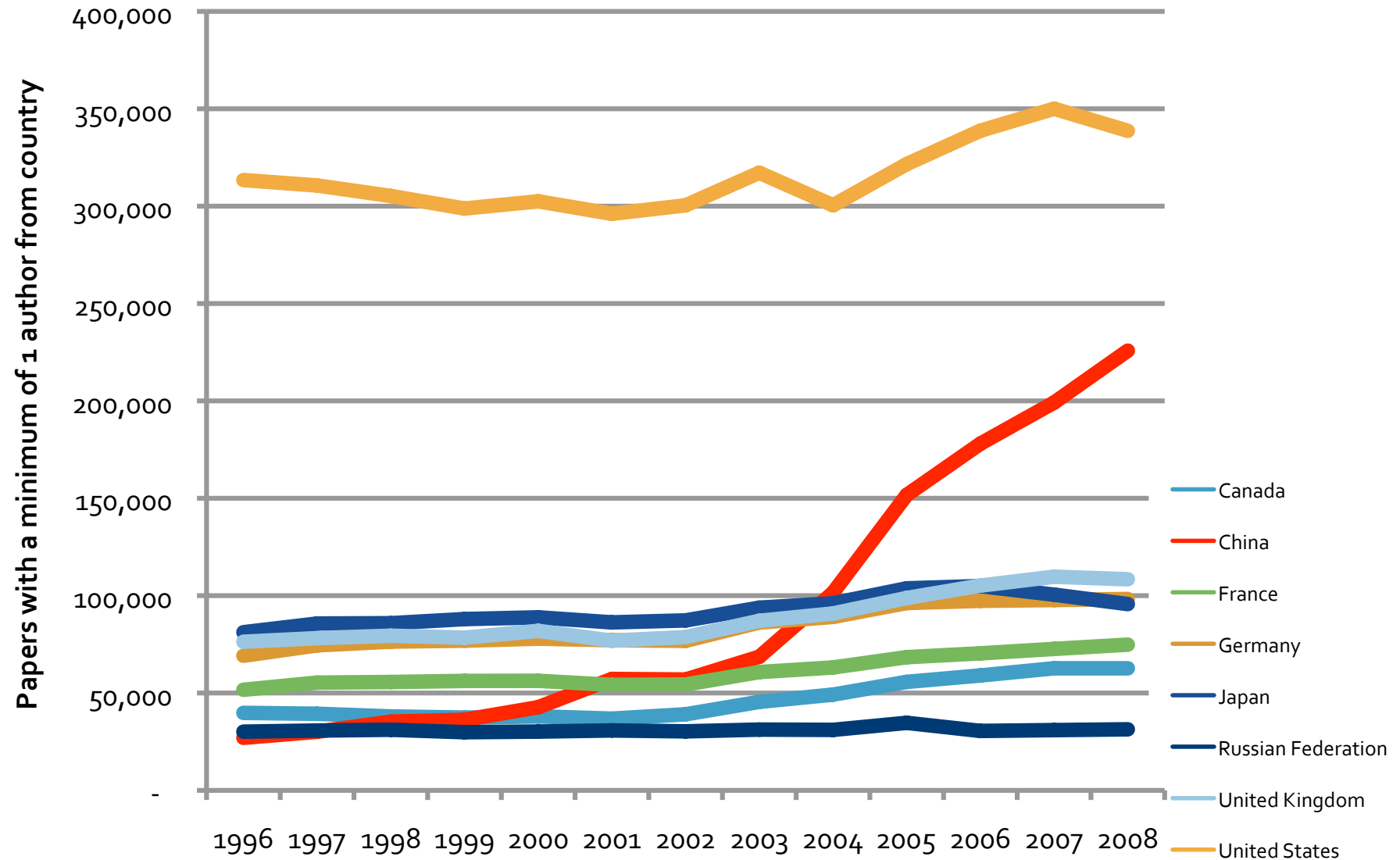
Economy

E-Reader Market

Source of PhDs

Source of journal  
content

# Journal article output





**China as a Market?**

# Chinese market characteristics

- Developing economy - pricing and funding
- Language barriers
- Piracy
- State control of publishing industry
- Market access restrictions
- Local partnerships important but not a “complete solution”



# 1970s







Mr. & Mrs. Wiley

Beijing, China April 1979 威立夫妇在天安门广场

# 1980s

- No intellectual property protection
- Exchanges between Chinese and international publishers
- First Beijing Book Fair (1986); book imports grow
- Economic and political reforms
- Investment in education and R&D
- Economic and political reforms mostly bypass publishing industry



# 1990s

- New copyright legislation
- Market for imported books and translations grows
- Internationally-published journals still mostly pirated
- Publisher revenues still low



# 2000 - 2009

- STM Publishers victorious against journal piracy – sort of (2001)
- International journal licensing and imports boom
- Journal online usage and article submissions explode



# Key trends in 2011

- Old challenges still with us
  - Language & pricing
  - Piracy
  - Government control & market access
- Funding growth: R&D, education
- Libraries & competition
- Article output; citations (!)
- Reforms – research grants & tenure
- Nationalism & publishing
- Open Access
- Aspirations: Chinese STM publishing





## Conundrum

- China's emerging clout
- Limited influence (relative to other key countries) of international publishers
- Potential for disruptive change

# What international publishers can do...

- Build enduring relationships with customers and communities
- Develop brand, authorship & usage
- Get our message out
- Be more ambitious (and collaborative!) on IP issues
- Engage with and encourage Chinese STM Publishers





**Photos by You-Shu Chen**





**Thank you!**