Emerging Opportunities in Medical Publishing:
Footprints across the East-West Bridge

Caitlin Meadows, Publishing Services Director,
The Charlesworth Group
caitlin.meadows@charlesworth-group.com
Why being in China is A Good Thing...

Rapid recent developments create context of ambition for quality and prominence
History

• Isolation of academic research predominated until the 1980s

• 1980s-1990s saw more integration + policy analysis

• Period of integration from 2000s saw more rapid expansion and integration. More collaboration with Western presses

• GAPP reforms...

Context now of increasing desire to improve quality of output, both domestically and in international journals
The academic impact of Chinese STM journals expands, as indicated by the increasing number of journals listed in A&I services and the rising impact factors.

The average total citations of Chinese STM papers soars from 227 per journal in 2001 to 913 per journal in 2009, and the average impact factor from 0.264 to 0.452. In 2009, 185 journals showed total citations ≥2000, 117 journals an IF ≥1.*

Opportunities or competition to Western journals?

How might this picture look in 5 years..?

(Source: ISTIC; with thanks to Yan Shuai, Tsinghua University)
R&D spending, selected countries 2000–2015; the dotted lines indicate projections, based on announced targets.

Top 10 Chinese universities

1. Peking University
2. Tsinghua University
3. Fudan University
4. Zhejiang University
5. Nanjing University
6. Shanghai Jiao Tong Univ
7. Wuhan Univ
8. Renmin Uni of China
9. Jilin Univ
10. Sichuan Univ

Source: Chinese University Alumni Association 2009 (slides prepared by Adrian Stanley)
Project 211

- The Project 211 is a government organized project to help form national key universities and colleges

- Building on ambitions of Project 985

- Started in 1995 by the Ministry of Education of the People's Republic of China, with the intent of raising the research standards of high-level universities in China and cultivating strategies for socio-economic development

- There are currently 113 universities/institutions in the 211 Project. These have met certain scientific, technical, and human resources standards and offer advanced degree programmes
Future trends

China’s 12\textsuperscript{th} 5-year plan announced in 2011. Development of 7 key industries:

- New energy – solar, wind, nuclear
- Energy conservation and environmental protection
- \textbf{Biotechnology} – \textit{drugs/medical devices} \[cf. Biotech China 2012\]
- New materials
- New IT
- High-end equipment manufacture
- Clean-energy vehicles

Future trends

• Mar 2012: China earmarks c.$5.14 billion for basic science research in 2012 (26% up on previous year)

• As GDP growth slows, the Government puts emphasis on closer integration of Science and Technology with the economy – also consider how these are penetrating westwards (e.g. Huwei)

• Pharma: consolidation of pharmaceutical distribution sector and biotechnology. Improvements in patenting; OTC market expansion. Multinationals//local pharma

• NB: For those publishers looking at other territories, Malaysia, Indonesia and Saudi Arabia are coming on the radar (cf. Batelle Report (2012 R&D Funding))
Future trends: influence on subject area coverage for academic titles/sales opportunities?

- Past emphasis on communicable diseases giving way to chronic diseases [now accounting for 80% of deaths in China]

- Clinical medicine: diseases relating to aging and to obesity, cancer, stroke, cardiovascular disease, COPD. Psychiatry burgeoning

- Basic science: more international collaboration [MRC-China collaboration in stem cell research announced Jan 2012; Ministry of Finance announces $125million to promote results of China’s R&D results into the commercial sector…]
China
Footprint
Pulling all the data together to make a long term plan and commitment to China

What is your impact on and with China?

✓ Sales (market analysis, gap): Consortia? Direct? Corporate?
✓ Online usage (including OA content, analytics)
✓ Local editorial board members (active)
✓ Chinese Authors/co-authors
✓ Attending/organizing local meetings, Chinese attendees at your meetings (as well as major conferences/BIBF)
✓ Local language material/website, what aspects to promote (use of social media etc.) – key trend
✓ Local language editions – using connections such as multinational pharma links
✓ Trusted local staff, contacts and partners
✓ Your educational outreach (systems/training)
✓ How you are viewed in China, your reputation
Brand awareness: publisher and journal level

- Local language material (librarians/researchers/discoverability)
- Social media (Weibo)
  - YouTube, Facebook, and Twitter are blocked in China (LinkedIn not)
  - Weibo akin to a hybrid of Twitter and Facebook
  - use by well over 30% of Internet users,
  - Launched by SINA Corporation on 14 August 2009
  - More than 300 million registered users
- Local language websites .cn domain names, local search
- Attending conferences (often pay to speak)
- Education events (how to publish)
查尔斯沃思中国▼：【北京大学斯坦福中心成立】北京大学斯坦福中心成立，主要负责管理斯坦福大学在中国的海外项目。不同于其他同行，斯坦福大学在北大校园里拥有一块三万多平方米的属于自己的研究楼，这是美国第一所在中国大学中建设自己研究中心的学校。斯坦福大学投入了700万美元在这个项目上。http://t.cn/zOi32yT

查尔斯沃思中国▼：美国营养学会（ASN）旗下期刊《美国临床营养学杂志》（AJCN）创刊60周年。AJCN是世界营养学领域广受赞誉的同行评审期刊，刊载原创性研究，影响因子6.6，在出版的全部学术期刊中排名在4%的位置，被Special Libraries Association选择成为生物和医学领域近100年中最具影响力的100本期刊之一。
Local-language publications: a bridge

- Co-publishing with a Chinese publisher (Chinese ISSN)
  - Can be distributed via the postal system
  - Subscription fee can be charged
  - Advertising
- Industry sponsored ‘best of’ with a local partner
  - Local partner does not have to be a ‘Chinese’ publisher
  - Single or multiple sponsor options
  - Distribution typically via sales reps
- ‘Import’ model
  - Mail journal into China (from Hong Kong or elsewhere)
  - Assigned ‘regular’ ISSN
Local-language reprints

Commercial reprints

- Limited market for English-language reprints, but changing...
- Do not expect to get same price as in U.S. or ROW
- Sponsors prefer journal covers with product advertising
- Still predominately print distribution, high impact-factor titles
- Multi-nationals still the main reprint purchasers but a local Chinese pharma companies are developing (consider your current pharma links)
- Consider importance of translation integrity – links with local KOLs to review and check
Thank you!*

caitlin.meadows@charlesworth-group.com

*and thanks to colleagues at The Charlesworth Group,
esp. Adrian Stanley
<table>
<thead>
<tr>
<th>CHINA</th>
<th>INDIA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GOVERNMENT</strong> A single party rules China. Those at the top control the reforms process, although bureaucrats located far from Beijing don’t always do its bidding. Officials who deliver economic growth can move up the ladder.</td>
<td><strong>GOVERNMENT</strong> Coalitions of political parties jockey for power in a raucous democracy. Positions of power aren’t dominated by traditional economic or social elites. Individual rights are respected, but the presence of many interest groups often renders the system dysfunctional.</td>
</tr>
<tr>
<td><strong>INFORMATION AND TRANSPARENCY</strong> Economic information is increasingly available, but political information is not. The state’s efforts to curtail news compete with technology-based efforts to disseminate information.</td>
<td><strong>INFORMATION AND TRANSPARENCY</strong> There’s a cacophony of voices that are rarely deliberately inaccurate. The media debate everything; nothing is off-limits. In fact, they are increasingly exposing corruption in high places.</td>
</tr>
<tr>
<td><strong>PROPERTY RIGHTS</strong> The state respects the individual’s rights to property more than it used to, but it still sacrifices them on the altar of public interest when the two come in conflict. The state can therefore make huge investments in public goods.</td>
<td><strong>PROPERTY RIGHTS</strong> The individual’s rights to property are sacrosanct. Public interest is often sacrificed for the individual’s sake. The government can make only small investments in public goods, which has led to poor infrastructure.</td>
</tr>
<tr>
<td><strong>LOCAL BUSINESS</strong> The country has millions of would-be entrepreneurs, but their potential is constrained unless they partner with the state or with foreigners. The government is often the entrepreneur.</td>
<td><strong>LOCAL BUSINESS</strong> Indigenous enterprise has flowered in the past 15 years. It is aided by effective capital markets, good information flows, and respect for property rights.</td>
</tr>
<tr>
<td><strong>MULTINATIONAL COMPANIES</strong> Foreign companies get red-carpet treatment from the state. Since they usually rely on their home bases for capital and senior talent, they aren’t affected much by China’s poor markets.</td>
<td><strong>MULTINATIONAL COMPANIES</strong> The government continues to exhibit a distaste for foreign investment, although less so than in the past. That’s partly for good reasons, like supporting indigenous entrepreneurs, and partly for bad ones, such as protectionism.</td>
</tr>
</tbody>
</table>

Source: China + India: The Power of Two, Tarun Khanna, Harvard Business Review
## China

**DIASPORA** Overseas Chinese played a catalytic role in starting China’s economic miracle two decades ago. They are still a source of capital, while Chinese returning home contribute brainpower.

**RURAL ECONOMY** The physical infrastructure in the villages is often superb. But the relative decline in the rural standard of living, compared with that in coastal areas, has fueled protest and resentment.

**EDUCATION AND HEALTH** The resource-rich state has made large investments in education. Basic literacy levels are very high. The quality of healthcare is bad, partly because China moved away from a centralized system to a private model after 1978.

**EXTERNAL RELATIONS** A fiat-driven approach characterizes China’s relations with the world. The country leads with its wallet. China is stronger than India in their common hinterland in Asia and is gaining prominence in Africa and central Asia.

## India

**DIASPORA** Once shunned, nonresident Indians are more accepted than they used to be. Capital flows from overseas Indians come in the form of remittances, not investments.

**RURAL ECONOMY** The state’s utter neglect of rural India has left villagers impoverished. The infrastructure is usually in terrible shape. The efforts made by the private sector and civil society to help villagers are laudable but inadequate.

**EDUCATION AND HEALTH** The state has made woefully inadequate investments in education. The quality of healthcare, especially for the masses, is terrible. Private-sector investments help compensate, but they aren’t large enough to make an impact.

**EXTERNAL RELATIONS** The state’s inefficiency extends to projecting India’s influence. India’s best brand ambassadors are its companies, executives, academics, and film stars. India is incapable of using hard power but is a masterful exponent of soft power.

---

Source: China + India: The Power of Two, **Tarun Khanna**, Harvard Business Review