



桂  
花  
諮  
詢  
顧  
問  
公  
司

## Open Access Growth and Perceptions in China

ALPSP Annual Conference and Awards 2023

Session - OA China: Positioning publishers to succeed in the world's largest market for articles

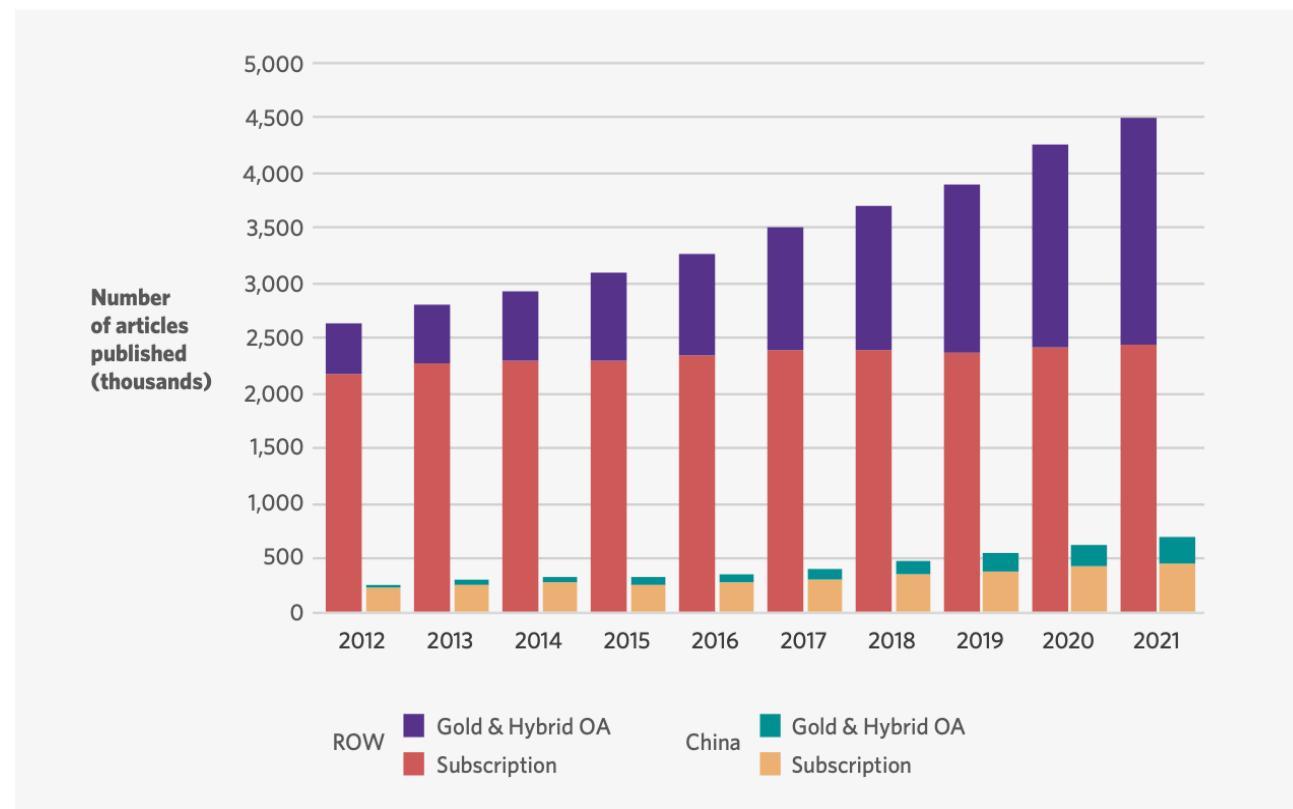
15 September 2023

Nicko Goncharoff

## Growth of OA in China

**China is a significant driver of OA growth but ambiguity over OA quality and concern about APC costs have led to less robust adoption compared with other regions**

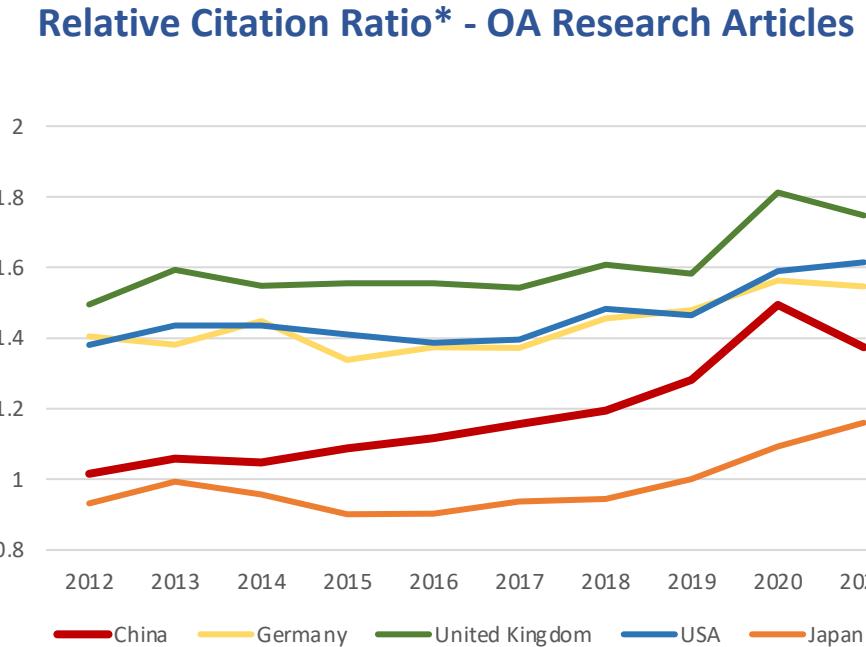
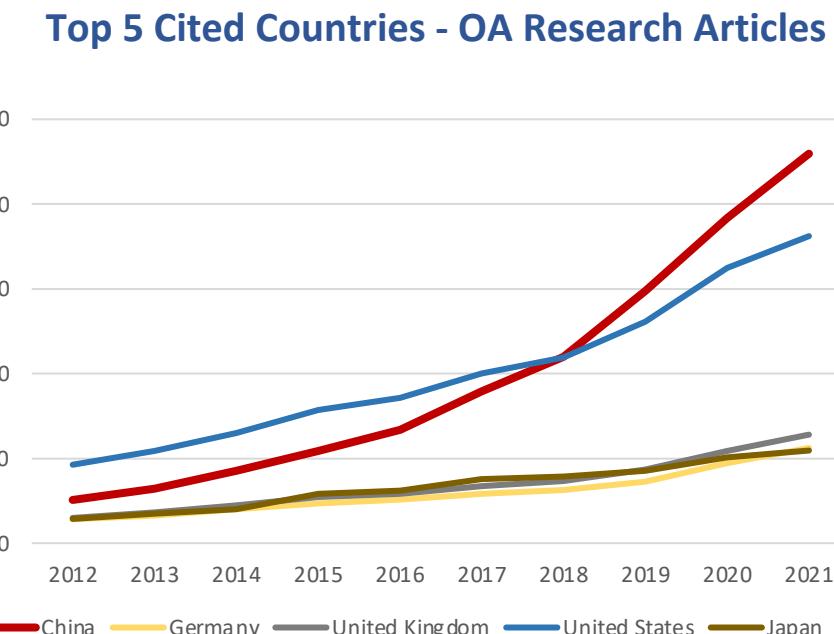
**Output by article access type – China versus ROW\***



By 2021, Gold and Hybrid OA articles accounted for 35.1% of China's annual output of journal articles, compared with 44.3% for rest of world

## OA Citation Performance

**China now leads the world in total citations for OA research articles and has made significant gains in OA impact as measured by relative numbers of citations per article**



Along with the rapid increase in China's OA article output, between 2012 and 2020 the Relative Citation Ratio for Chinese OA research articles increased 47%, compared with 21% for the UK and 15% for the US.

\*Relative Citation Ratio (RCR) indicates the relative citation performance of a publication when comparing its citation rate to that of other publications in its area of research. The visualization shows the average RCR per publication published in each year.

Source: Dimensions, an inter-linked research information system provided by Digital Science (<https://www.dimensions.ai>).

## China and Open Access - An Evolving Relationship

- China does not have a consistent or national approach to OA yet. The introduction of any national OA policy will likely depend on how much control China feels it has over future APC expenditure and driving OA submissions to Chinese-owned journals
- Definitions of what constitutes OA remain fluid: many of China's OA publications are state-funded journals that charge neither subscription nor APC fees, particularly for domestic publications
- While OA submissions to international publishers have grown significantly, there are still lingering perceptions that OA publishers are being predatory
- OA will continue to grow in China, but international publishers should be prepared for lower margins, resistance to higher APCs and challenges in rapidly growing the number of transformational agreements

中国科学院文献情报中心

**Go OA** OA期刊APC及合理性查询

\*

(必填)请输入期刊名称

(可选)请输入期刊ISSN或EISSN

期刊所属的学科领域

期刊APC查询

期刊APC合理性查询

◆**APC**: 开放获取论文 (OA论文) 处理费  
Article Processing Charge

◆**GoOA** ([点击可获取联系方式](#)) : 全球优质  
OA科技期刊评价与发现平台

APC Cost Checker, one of the key features of the  
CAS National Science Library GoOA portal

### An Increasing Burden

- China published about 1.1 million Gold OA or Hybrid articles in 2012-21
- If one assumes a (conservative) average APC of \$1,700, the cost to Chinese institutions and authors would have been \$1.85 billion for 2012–2021
- In 2021 alone this cost would have been \$409.7 million

### \$1,200 - A “Reasonable” APC

- Since mid-2020 there have been increasing mentions in Chinese scholarly social media that reasonable APCs would be around US \$1,200
- International publishers in China have received similar suggestions in discussions with China customers, partners and policy makers
- Perhaps not coincidentally, CAS set the APC for its new *National Science Open* journal at US \$1,200

- The prospect of steadily increasing APCs is a key factor driving China to capture a larger share of the STM publishing market through efforts like the China Journal Excellence Action Plan
- International publishers will also see increasing pressure to reduce APCs either via pricing adjustments, fee discounts or via “cost-neutral” transformative agreements
- This approach to APCs, combined with increased domestic competition, could put downward pressure on overall APC levels in China and is one of several reasons for limited uptake of transformative agreements

## Transformative Agreements – Modest uptake

**The absence of any national OA mandate and APC cost concerns, mean Chinese institutions and government agencies are slow to adopt read & publish and other agreements covering both subscription and APC spend**

### Transformative Agreements in China

Chinese Institutions	International Publisher(s)	Type	Start Date	End Date**
Tsinghua University	Association for Computing Machinery*	ACM Open	2021	2024
	Cambridge University Press	Read & Publish	2022	2025
	IWA Publishing*	Subscribe to Open	2022	Open-Ended
CAS National Science Library	Association for Computing Machinery*	ACM Open	2021	2026
	Oxford University Press	Read & Publish	2020	2023
CAS Institute of Microbiology	Microbiology Society*	Publish & Read	2022	2024
Chinese Academy of Agricultural Sciences	Microbiology Society	Publish & Read	2023	2025
Wuhan University	IWA Publishing*	Read & Publish	2023	2024
	Microbiology Society*	Publish & Read	2022	2024
Chang'an University	IWA Publishing*	Read & Publish	2023	2024
Chinese Academy of Medical Sciences	Karger	APC credit for subscribers	2021	2024
Fudan University	Cambridge University Press	Read & Publish	2023	2025
	Microbiology Society*	Publish & Read	2024	2026
PengCheng Laboratory	Association for Computing Machinery*	ACM Open	2023	2023
Shanghai Jiaotong University	Cambridge University Press	Read & Publish	2021	2025
Westlake University	Association for Computing Machinery*	ACM Open	2023	2025
Xi'an Jiaotong-Liverpool University	Cambridge University Press	Read & Publish	2022	2025

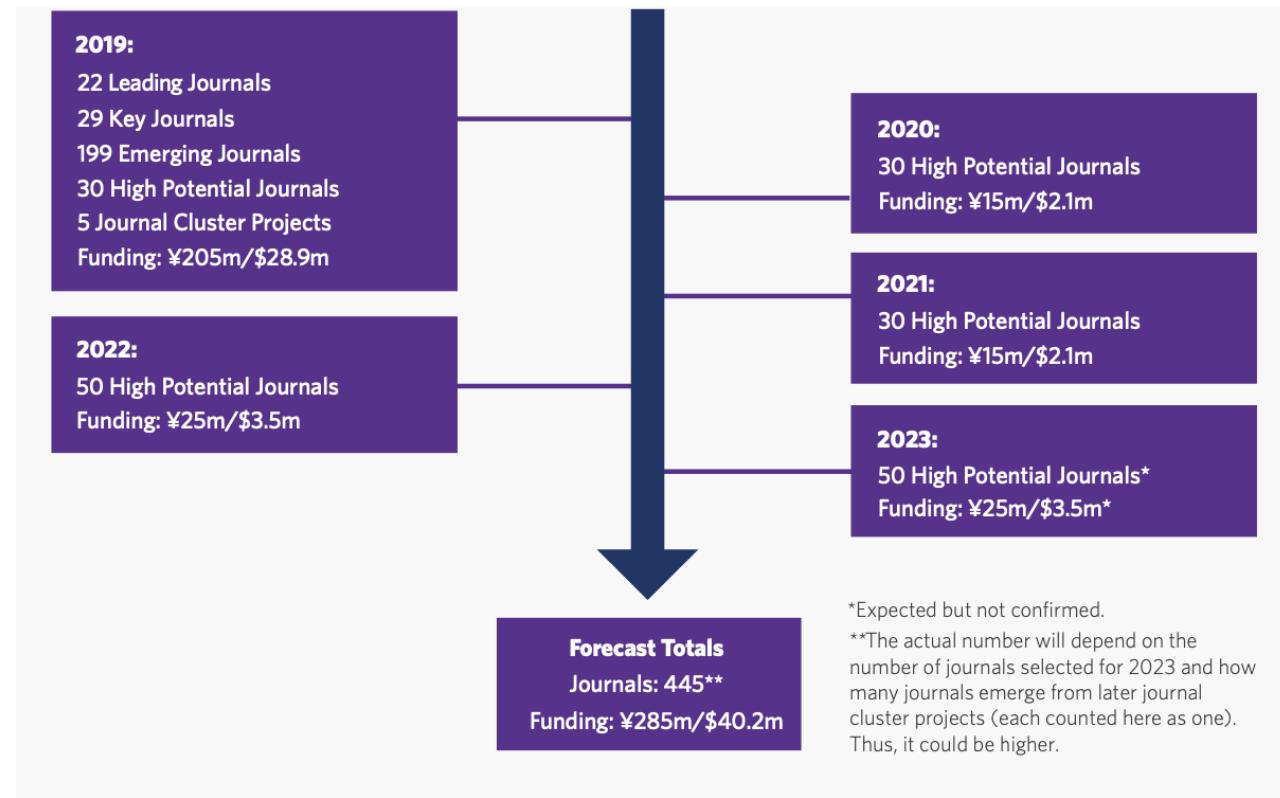
\*Denotes agreements handled by The Charlesworth Group

\*\* End date as of 2023 based on current information

## China Journal Excellence Action Plan (CJEAP)

**The CJEAP is China's most sustained and well-funded effort to develop its STM journal sector. If successful the initiative will significantly increase the number of world-class Chinese journals and enable China capture a greater share of APC spend**

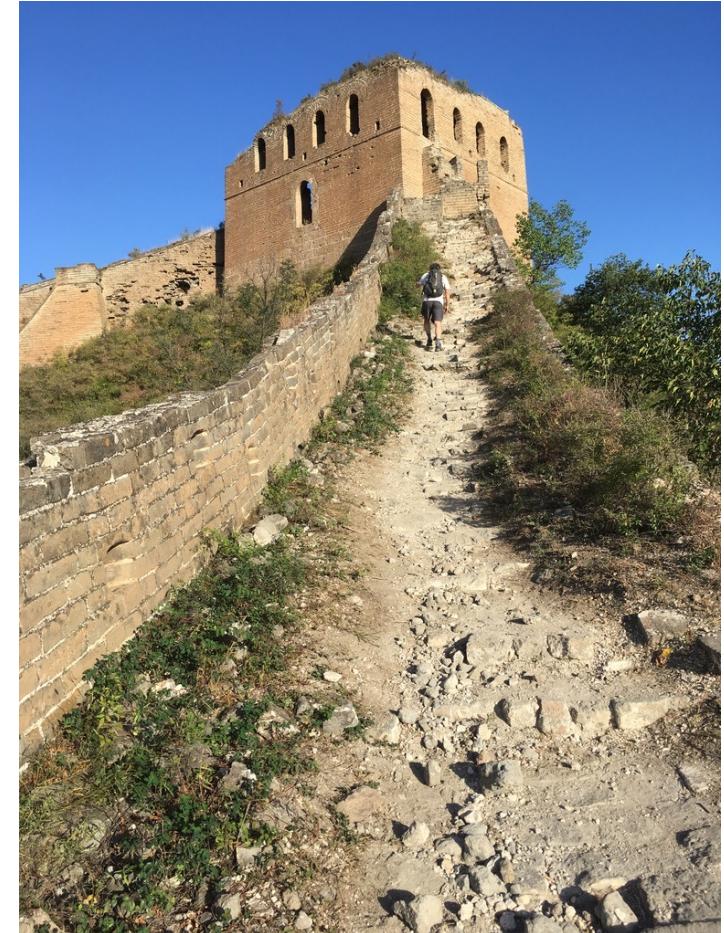
### China Journal Excellence Action Plan Timeline



The Chinese Government launched the China Journal Excellence Action Plan in 2019, a 5-year project to create a portfolio of more than 400 world-class, Chinese-owned STM journals. It is supported by seven ministry-level organizations and managed by the China Association for Science and Technology.

## Conclusions

- While China's overall volume of publications is driving significant growth in OA output globally, concerns around quality and APC costs have somewhat slowed adoption compared with other regions
- China concerns over APC costs and a goal of a “cost-neutral” transition to OA will put pressure on international publisher profit margins
- Uptake of transformational agreements may increase, but the absence of a national mandate, and budget and administrative challenges faced by institutions, means international publishers must adopt a different approach for China compared with other regional markets
- The China Journal Excellence Action Plan aims to significantly increase China's portfolio of world-class journals and potentially steer more APC spend toward domestic publishers



Thank You



OSMANTHUS  
CONSULTING

[www.osmanthusconsulting.com](http://www.osmanthusconsulting.com)  
[nicko@osmanthusconsulting.com](mailto:nicko@osmanthusconsulting.com)



[\*\*STM Publishing in China Market Report\*\*](#)

An in-depth commercial analysis of STM publishing in China for publishers and publisher service providers worldwide