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Value Manifestation and Path Selection of Macau's Book Publishing Industry 'Going Global' Under the National Strategy: Postprint

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Abstract

[Objective] Since Macau's return to China over two decades ago, Macau's book publishing industry has advanced 顺应 the trend, fully leveraging its regional and professional advantages, ushering in a new opportunity for growth. [Method] Based on a review of the current state of Macau's book publishing industry, this study analyzes the value demonstration of Macau's book publishing industry "going global" from three perspectives: meeting the requirements of national development strategic positioning, remedying internal defects in the Macau market, and opening up new prospects for Macau's book development. [Results][Conclusion] Regarding the future development of Macau's book publishing, it is necessary to adhere to exchanges and cooperation to build a bridge for Sino-Portuguese book publishing trade, integrate industry-academia-research collaboration to improve talent cultivation and introduction systems, leverage the "window effect" to create distinctive cultural IP, and innovate operational concepts to achieve publishing transformation.

Full Text

Preamble

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The Value and Path Selection of Macau's Book Publishing Industry "Going Out" Under the National Strategy

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Abstract

[Purpose] Over two decades since Macau's return, the book publishing industry in Macau has advanced with the trend, fully leveraging its locational and professional advantages to embrace new opportunities for growth. **[Method]** Based on a systematic review of the current state of Macau's book publishing industry, this study analyzes the value manifestation of Macau's publishing industry "going out" from three perspectives: meeting the positioning requirements of national development strategies, compensating for internal market deficiencies in Macau, and opening new horizons for Macau's book publishing development. **[Results][Conclusion]** For the future development of Macau's book publishing industry, it is necessary to persist in exchanges and cooperation to build a Sino-Portuguese book publishing trade bridge, integrate industry-academia-research to improve talent cultivation and introduction systems, leverage the "window effect" to create distinctive cultural IP, and innovate operational concepts to achieve publishing transformation.

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Introduction

The report of the 20th National Congress of the Communist Party of China proposes "strengthening international communication capacity building, comprehensively enhancing international communication effectiveness, and forming international discourse power commensurate with China's comprehensive national strength and international status." As a crucial region in China's outward development strategy, Macau serves as a "contact point" with countries worldwide, particularly Portuguese-speaking countries along the "Belt and Road." Book publishing represents an essential means of cultural export and external exchange. Examining the development and current state of Macau's book publishing industry helps understand its vital role in the process of the central government and the Macau Special Administrative Region (SAR) government deeply building a global exchange platform and expanding the influence of Chinese culture, while also providing direction for the market positioning and development models of Macau's book publishing industry.

1. Current State of Macau' s Book Publishing Industry

1.1 Legal Supervision and Publishing Institutions

Macau is a culturally diverse region that encourages freedom of expression with relatively relaxed cultural review systems. Publications serve as important tools for expressing ideas, and the Macau SAR government wishes to convey social values of free consciousness and information flow. In Macau, publications have become representative of the region' s multicultural assets. Macau' s publishing law stipulates that “the exercise of freedom of expression in the publishing world shall not be subject to any form of censorship, permission, deposit, guarantee, or prior qualification recognition. Discussion and criticism are free, especially concerning political, social, and religious doctrines, laws, and the actions of the region' s own management bodies and public administration authorities, as well as the actions of their personnel” [1]. In 2008, the Macau SAR government promulgated the “Legal Deposit System” to collect, organize, and preserve all Macau publications, which are stored at the Macau Public Library. To facilitate procedures for publishing units, the Macau Public Library' s official website illustrates each step' s key points in graphic form, further simplifying the process. Additionally, to encourage publishers to join the International Standard Book Number system, the Macau Public Library provides agency services for ISBN applications.

Macau' s publishing institutions are diverse, comprising six categories: associations, private publishers, self-funded individual publishing, government departments, schools, and others. There are over 7,000 registered associations across Macau. As shown in Table 1 , between 2000 and 2021, a cumulative total of 1,160 institutions joined the Macau ISBN system, belonging to different categories of publishing institutions including government departments, schools, commercial organizations, and civil organizations [2], among which civil organization publishers accounted for as high as 38.6%, becoming an important force in Macau' s book publishing industry development.

1.2 Book Publishing Language and Market

Macau is a region where multiple ethnicities and cultures coexist, with rich and diverse languages. The Macau SAR government implements a Chinese-Portuguese bilingual policy. In terms of book publishing, Macau' s publications are primarily in Chinese, followed by Portuguese and English. Although Macau was formerly a Portuguese colony, its geographical relationship with Guangdong is inseparable, sharing the same cultural roots. Throughout history, Macau has never experienced a cliff-like separation from the mainland, maintaining close exchanges that ensure the widespread use of Cantonese and Mandarin. Macau positions itself as a world leisure and entertainment center, attracting substantial foreign investment through favorable tax policies, making multi-ethnic and multi-language coexistence the current social reality. Due to its special historical and geographical position, Macau has long served as an important hub for

exchanges between China and Portuguese-speaking countries. Multi-language publishing is both a publishing characteristic and a favorable condition for opening international book markets.

Currently, Macau's book publishing market is dominated by multiple languages, with a total exceeding 3,000 titles. Chinese-English-Portuguese trilingual books, Chinese-English bilingual books, and Chinese-Portuguese bilingual books account for relatively high proportions. Among them, Portuguese works focus primarily on law and art, while English works concentrate on literary creation and language learning [3]. In market terms, Macau's book publishing industry features distinctive characteristics, with social science books as the dominant category, art books as the highlight, and multi-language book publishing as the specialty. Macau's book circulation market is relatively small, with government publications dominating in content and quantity, mostly distributed free to residents. Approximately 60% of books are not sold commercially [4]. Most published books can receive subsidies from the government or foundations, making it impossible to measure their market economic value solely by commercial standards. As shown in Table 2, between 2017 and 2021, Macau's book publishing remained at approximately 600 titles annually. 2019 marked the 20th anniversary of Macau's return to the motherland, and on this special occasion, various sectors enthusiastically published related content, causing a surge in book publishing that year. In 2021, Macau's published books and periodicals reached a new high, with output reaching 802 titles, reflecting that Macau's publishing industry is steadily developing.

1.3 Digital Publishing and Database Construction

Macau's book publishing industry actively promotes the popularization of e-books. Currently, most books are available in both print and electronic versions, with multiple reading modes coexisting to further align with young readers' habits. In 2011, the Macau Foundation launched the Virtual Library, establishing an online Macau information and academic exchange center that stores over a hundred works published by the Macau Foundation, other Macau publications, and domestic and foreign books related to Macau. The Virtual Library can query the latest Macau publications, providing full-text search and free online reading and downloading. The Virtual Library serves not only as an online reading platform but also as a database for Macau publications. Macau has basically achieved resource co-construction and sharing within the public library internal system. In 2018, the Macau Public Library launched multiple online services including "Self-service Borrowing and Returning," "Read First," and the mobile application "BookMyne." Simultaneously, the Macau Archives issued the "Technical Specifications for Digitization of Paper Archives" for use or reference by various departments of the Macau SAR government.

1.4 Macau' s Characteristic Support Policies

On January 1, 2022, Macau officially implemented the administrative regulation on the “Organization and Operation of the Cultural Development Fund,” merging the previous “Cultural Fund” and “Cultural Industry Fund” into the “Cultural Development Fund,” which uses its resources to support activities and exchanges in cultural and artistic fields, cultural industry projects, and activities and projects supporting cultural heritage protection. The funding approval principle focuses on investing in enterprises, with support targets being legally registered cultural industry-related enterprises in Macau, whose legal representatives must be Macau residents. For the publishing industry, the Cultural Development Fund launched a special funding plan for a comprehensive publishing service platform, open to Macau institutions, associations, and individuals, providing funding for publications on Macau history, art, culture, and other aspects [5]. Under this funding plan, the Cultural Development Fund provides one-stop support services covering publishing, e-books, ISBN applications, new book launches, online sales, participation in book fairs, and entry into physical bookstores, with funding amounts up to 5 million Macau Patacas. The Cultural Development Fund not only helps publishers connect with relevant institutions and associations and supports book typesetting and proofreading but also promotes sales of these books to regions outside Macau, including online e-book sales. Additionally, it organizes Macau industry professionals to attend at least two book exchange exhibitions in the mainland for publication sales and copyright transactions, to deepen exchanges and cooperation between Macau and the mainland.

2. Value Manifestation of Macau' s Book Publishing Industry “Going Out”

2.1 Meeting National Development Positioning Requirements

Following the principle of “what the country needs, what Macau excels at,” the Macau SAR government actively participates in the “Belt and Road” construction process, leveraging its local cultural advantages. Macau serves as a platform for exchanges between China and Portuguese-speaking countries. In the process of external cultural exchange, book publishing should emphasize utilizing local multi-language publishing characteristics and strengths to actively export high-quality Chinese cultural book works to overseas markets, showcasing China' s modernized appearance and the sincerity and enthusiasm of the Chinese nation, thereby narrowing communication barriers caused by cultural differences. Macau' s book publishing “going out” not only profoundly demonstrates Macau' s image as a bond connecting China with Portuguese-speaking countries but also effectively promotes the goal of establishing friendly city relationships with countries along the “Belt and Road,” playing an irreplaceable important role in cultural exchanges.

According to the “Guangdong-Hong Kong-Macao Greater Bay Area Develop-

ment Plan Outline,” the Macau SAR government has implemented a series of cooperative projects for the Greater Bay Area, striving to effectively achieve alignment with national development and integrate into national development planning, jointly seizing new opportunities with the central government. Macau’s book publishing industry bears significant responsibility in strengthening cultural identity of the Chinese nation across the Taiwan Strait and in Hong Kong and Macau regions. Facing Hong Kong and Taiwan regions, Macau’s publishing industry actively expands its book markets, not only learning from and introducing books representing advanced science and culture but also vigorously exporting excellent Chinese culture-oriented publications and Macau-characteristic books to them. Facing the mainland, Macau’s book publishing undertakes the mission of promoting mutually beneficial cooperation in the Pan-Pearl River Delta region in terms of bilateral trade and cultural exchanges. As a bridge connecting China with the world, Macau is a disseminator of Chinese culture externally and an important collaborator in the Greater Bay Area development internally. Based on this foundation, Macau’s book publishing industry can achieve great accomplishments by grasping market opportunities.

2.2 Compensating for Internal Market Defects in Macau

Although Macau’s book publishing industry has generally maintained steady progress in recent years, deficiencies remain in various aspects that require improvement in future operations and development. First, Macau’s internal market is narrow, and local residents have consistently shown inertia in reading consumption. According to statistics released by the Macau SAR government’s Statistics and Census Service, as of 2021, Macau’s total population was 680,000. This small population limits the development of Macau’s book market, making it difficult for the local market to achieve sustainable survival through internal drive like most regions. Macau’s book publishing institutions cannot achieve scaled operations locally. Although the government has consciously implemented a series of encouraging measures, allocating fixed annual funds to support local book publishing, it still cannot change the reality of limited reading population and weak active consumption willingness in Macau. Ultimately, this results in low commercialization and competitiveness in book publishing and distribution in the Macau market, with reliance on government funding and individual investment remaining mainstream. Macau’s book publishing “going out” can help Macau expand overseas markets, enhance the overall influence and competitiveness of Macau’s book publishing in external cultural communication, and meet the industry’s economic benefit development needs.

Second, Macau’s book publishing currently has limited variety and unbalanced market development. Limited funding sources for publishing activities have led to imbalanced development in Macau’s book publishing categories. Books funded by government subsidies and individual authors rarely consider market reactions, with alignment to the Macau SAR government’s concepts or satisfaction of authors’ personal preferences becoming the primary goal of book

publishing. Currently, published content in the Macau book market shows obvious tendencies, focusing mostly on Macau's local customs, historical allusions, politics and economics, and scientific academic achievements, while popular and commercial book achievements such as fashion, beauty services, and literary fiction are relatively scarce. Over time, this can easily lead to imbalance in the local book market, leaving Macau residents' reading needs unmet and hindering the development of Macau's book publishing industry. Macau's book publishing "going out" can help balance the development of the local book market, introduce new market competition mechanisms, provide diversified reading options for Macau residents, and align with national needs for vigorously developing cultural industries.

3. Future Development Path Selection for Macau's Book Publishing Industry

3.1 Persisting in Exchanges and Cooperation to Build a Sino-Portuguese Book Publishing Trade Bridge

Previously, after years of practice, Macau's publishing industry experienced minimal market fluctuations with relatively rigid models. However, major national-level development strategies such as "Belt and Road" construction have brought new opportunities to Macau's book publishing industry. On the one hand, the "going out" of book publishing has revitalized Macau's local book publishing market. As an important front for external exchanges, Macau's book publishing industry plays a significant role in cultural output. Unfortunately, Macau's book publishing market previously relied heavily on government support for an extended period, with low market vitality and limited local circulation, resulting in minimal economic benefits. Attempting to expand markets outward and conduct cultural trade exchanges with countries and regions worldwide can facilitate the circulation of more abundant publications in Macau's book market. The resulting economic, cultural, and political benefits can stimulate Macau's book publishing market, inspire competition and cooperation awareness among publishers, enhance cultural market vitality, meet consumers' growing and diversified reading needs, and gradually reduce Macau's book publishing market's dependence on government support. Simultaneously, this is conducive to improving Macau's book market operation mechanisms, increasing market circulation rates, creating more employment opportunities in Macau, and generating more diverse value for the social economy.

On the other hand, book publishing "going out" can promote talent upgrading in Macau's book publishing industry. Zhang Yanqing, President of Macau People Publishing House, mentioned in an interview for this study: "Most publishing practitioners have not received professional training in editing, proofreading, and distribution, which has affected the quality and efficiency of book publishing to a certain extent." This indicates that insufficient human resources in the publishing industry and lack of professional competence among publishing

practitioners have led to inconsistent quality in local book publishing and low creativity in the book publishing market. As a bridge for civilization exchange, book publishing bears the important responsibility of promoting mutual understanding and strengthening connections among peoples. Both the export and import of book publishing require substantial professional talent. In terms of book export, translators are required to translate according to local readers' reading habits and cultural thinking to narrow cultural differences and enable more harmonious mutual understanding between trading countries. In terms of language, Macau has a natural Portuguese language advantage, with the University of Macau, City University of Macau, and Macao Polytechnic University continuously developing Portuguese language education, application, and talent output. The expansion of Macau's book market exports and imports provides new breakthrough points and economic growth points for the rigid market, helps enhance the enthusiasm of relevant practitioners, and can further leverage Macau's advantages in cultivating professional translation talents, multi-language talents, and interdisciplinary publishing-related talents, increasing the content of composite business talents in local editing, typesetting, design, book marketing, distribution, and other aspects, and optimizing the local talent structure.

3.2 Integrating Industry-Academia-Research to Improve Talent Cultivation and Introduction Systems

The publishing industry is based on culture, using innovation and intellectual property to produce goods with cultural content or provide services with cultural connotations, which determines its high dependence on talent. The quantity, quality, and stability of practitioners have tremendous impact on the entire industry's development. Achieving maximum benefits through free talent flow and optimal allocation, maximizing talent development benefits, and fully realizing talent value are inevitable requirements for promoting the vigorous development of Macau's publishing industry.

Addressing the current shortage of local book publishing professionals in Macau, the Macau SAR government needs to emphasize talent cultivation, talent policies, and talent guarantee systems. The Macau SAR government should actively integrate into the construction and development of the neighboring Hengqin area in Zhuhai, seizing opportunities presented by the Guangdong-Hong Kong-Macao Greater Bay Area construction to create new space for talent cultivation in Macau's publishing industry. Additionally, it needs to combine the positioning of major universities in Macau, actively implement the "talent green card" policy, smooth the market-oriented channels for talent to apply for permanent residence, achieve regional industry-academia-research optimization and upgrading, cultivate and attract a group of book publishing professionals who possess both professional knowledge and practical abilities, and strive to achieve a virtuous cycle of "promoting industry development through educational achievements, and innovating academic teaching through industry cooperation," enabling Macau to

enhance the international competitiveness of its local publishing industry during economic structural transformation.

3.3 Leveraging the “Window Effect” to Create Distinctive Cultural IP

After literary works are developed in the form of IP (Intellectual Property), they can 反哺 (back-feed) the promotion of the original works. According to information released by China’s National Development and Reform Commission, as of November 2020, China had signed 201 Belt and Road cooperation documents with 138 countries and 31 international organizations. The vast trade market and cooperative development platform require Macau’s book publishing industry to leverage its international communication advantages, strictly control the quality of published works, consciously manage its own cultural brands, fully exercise autonomy under the principle of “consultation, joint construction, and shared benefits,” and collaborate with outstanding creators to jointly build cultural IP belonging to China and Macau, refining artistic expressions that integrate Chinese and foreign elements. For Macau’s book publishing industry, this is not only an important measure to enhance the ideological and cultural level of Macau’s local population and promote high-level nationwide reading but also an excellent opportunity to promote its own country’s and region’s outstanding ideological and artistic achievements and cultural concepts to the world, enabling the world to understand China and Macau.

3.4 Innovating Operational Concepts to Achieve Publishing Transformation

In the digital era, the publishing industry worldwide is at a critical transformation period. Combining traditional print media with new media and internet technology to promote digital transformation or business scope expansion in book publishing has become an inevitable trend for future publishing industry development. Although Macau’s book publishing industry currently has a relatively high degree of book electronicization, major book publishers in Macau need to recognize that there is a distance between book electronicization and true digital publishing. Macau’s book publishing industry should adapt to the demands of the times, break the boundaries between traditional and new media publishing, conceptually expand the concept of publishing, innovate understanding and judgment of publishing forms, carriers, and technologies, and promote the development of local e-books, audiobooks, and reading Apps in Macau. Simultaneously, Macau’s book publishing industry needs to reshape the relationship between books and readers, implementing audience-centered user integration strategies [6]. Specifically, this means providing extended services based on user needs, attempting to transform readers into users, and scientifically laying out publishing business. Only in this way can the ultimate goal of publishing convergence be achieved.

In summary, although Macau’s book publishing industry enjoys relatively re-

laxed publishing policy conditions in recent years, and digital publishing has brought new vitality to Macau's book publishing industry, problems such as a narrow local publishing market and shortage of professional talents persist. Macau's book publishing "going out" is not only necessary for deepening cultural exchanges with countries worldwide, deepening the construction of the Portuguese-language platform, showcasing national cultural image, and promoting coordinated political and economic construction of the Greater Bay Area, but also has profound impacts on Macau's own book market. Only by fully utilizing its inherent regional and policy advantages, actively integrating into national development strategies, and seeking changes and innovations both internally and externally can Macau's book publishing industry stand out in fierce competition.

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Note: Figure translations are in progress. See original paper for figures.

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