



Synthesis paper
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Envisioning an equitable future for research across the North-South Divide

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Abstract

This synthesis paper brings together perspectives from across the Global South and North to explore the complexities and challenges of promoting equity in research. Drawing on separate inquiry tracks from these regions, it contrasts the approaches, framings, and main concerns identified by stakeholders in both settings. Findings reveal that while actors in the Global North—particularly research for development funders—most often focus on reshaping research partnerships and advancing equity as an end goal in itself, those in the Global South view equity as integral to broader systemic transformations within the development knowledge ecosystem. Despite substantial variations in agendas, objectives and approaches to research collaboration between contexts, finding common ground is crucial to fostering cross-cutting, critical dialogue in Global South and North, and developing a joint action agenda for power-aware, pro-equity change. The synthesis paper proposes a framework grounded in Southern priorities to strengthen agency, align objectives, and identify spaces for transformative change within the research landscape.

Introduction

The concept of 'equitable partnerships' (Citizenship DRC, 2003, p.5) has been circulating in the research for development¹ field for a number of decades. Indeed, acknowledgement of 'new partnerships' in research for development dates back to the 1972 OECD Conference of Directors of Training and Research (Bradley, 2017, p. 39). More recently, the demand for equitable partnerships to be 'everyone's business' has gained significant traction amongst leading Northern institutions and funders in this field (UK Collaborative on Development Research, 2023).

So while research partnerships between 'Northern' and 'Southern' actors have long been understood as necessary to achieve development objectives, the power dynamics and politics shaping these partnerships have come under increasing scrutiny. For the purposes of this discussion, and from the perspective of a research organisation, a partnership can be broadly understood as "an intentional relationship with private sector, public sector, academic, or civil society organisations at national, regional and/or international levels to achieve common aims" (CGIAR, 2022). In practice however, there is variation in terms of whose aims count most across the spectrum of possible partnership configurations.

The current push towards equity is evidenced by a notable increase in the proliferation of guidelines, funder requirements, workshops, and conferences that focus on achieving a greater degree of localisation, reshaping and reconfiguring unequal power dynamics in the research for development field, or working differently in ways that acknowledge past harms, in some cases calling for reparations that address colonial injustices. Yet, if partnerships in research for development are an 'old' idea, what has changed to bring about this focus on equity? Underlying this more recent push are two clear agendas: 1) the drive to achieve

measurable research impacts and increase the efficiency of research for development; and 2) a moral and political imperative to 'decolonise' development structures and challenge unequal power dynamics.

Given the contested power dynamics in research for international development, and the tendency towards "buzzwords as fuzzwords" (Cornwall, 2007, p. 474) that can obscure these dynamics in practice, it is perhaps not surprising that some of the loudest voices championing equitable partnerships are coming from Northern funders, institutions and agencies. This 'laying claim' to the language of empowerment, without putting into practice actions that can actually shift power dynamics within knowledge ecosystems, has already been the subject of significant and meaningful critiques (Fransman et al., 2018). However, we continue to find that the perspectives of Southern actors and institutions are given insufficient priority, and there is still a lack of opportunity for Southern leadership to articulate a change agenda in research for development. In this context, Southern Voice, in collaboration with the Institute of Development Studies (IDS) and with the support of the International Development Research Centre (IDRC), has sought to explore and understand North-South partnerships in research for development. The aim is to better align debates and ensure that priorities emerging from the South are adequately heard and prioritised.

Approach

This project has aimed to foster a broader foundation of shared understanding and collaborative action on power-aware approaches to research for development across and within South-North divides, while acknowledging that this is an imperfect binary with many nuanced differences within both South and North. Recognising that unequal power shapes what is silenced and what can be spoken about in mixed groups, and recognising the

¹ This synthesis paper focuses on 'research for development', understood as studies and analyses that address critical development challenges and aim to uplift disadvantaged communities. This research usually blends academic research with practical interventions, and is generally funded by international development aid or philanthropy. Some issues raised in this arena may, however, resonate across other research communities beyond the field of global development.

problematic and tokenistic inclusion of Southern actors in consultations dominated by Northern actors, we decided to take a different approach. For this project's first year, which is the basis of this report, we engaged in separate inquiry tracks between the Global North and the Global South (see methodological note in Annex 1). This strategic choice sought to uncover commonalities and disparities in approaches, concerns, and challenges encountered by experts and practitioners in both settings, without inadvertently pushing a Northern agenda for these dialogues into Southern spaces.

What this enabled in practice was the facilitation of honest conversations and reflections on the challenges, frustrations, critiques, and opportunities in research for development, a sphere that is currently asking difficult questions about its future. The findings from this inception stage provide important input in identifying areas of contention and consensus, laying the groundwork for future encounters where Global North and South actors can come together to build a joint, more concrete action agenda to transform research systems.

In the following sections, we explore the different perspectives and main issues and concerns prioritised by stakeholders in the Global North and South. On this basis, we propose a framework to bridge these perspectives and stimulate action.

Global South and North: Two paths of inquiry

This section compares understandings of equity in research among Northern and Southern actors, and their key concerns over current conditions in the sector (Figure 1). In practical terms, the Southern track focused primarily on researchers engaged in research for development activities within universities and think tanks, and to a lesser extent, other actors such as funders or intermediaries. The literature review from the Southern track focused mainly on sources published by authors

based in institutions in the Global South. The Northern track engaged primarily with funders and key actors in the research for development sphere and, to a lesser extent, with researchers. The Northern track literature review focused particularly on understanding the 'equitable partnerships' discourse. As noted earlier, the divide between Global South and North is a generalisation that, while useful, comes with caveats. In this way, taking into account individual differences and nuances within groups, these findings must be used thoughtfully and critically.

Approaches and framings

Individuals and organisations approached in this project across both Global South and North communities acknowledge that unequal power in knowledge systems is at the core of many of the observed and experienced inequalities. However, there are significant differences in terms of how issues relating to inequalities and unequal power distribution are framed and understood. Broadly speaking, in the Global North actors focused more on specific relationships or partnerships. In the Global South, equity is often perceived as one facet of a broader agenda of inquiry into the performance of knowledge systems.²

Indeed, a review of Global South literature reveals that this scholarship does not tend to focus on the specificity of research partnerships, but rather on systemic issues such as incentives and institutional or public policies. While there are some recommendations scattered across this broad body of knowledge, these are not brought together in a consolidated Southern agenda. Actors in the Global South remain unsatisfied with current research structures and arrangements as they experience them, but focus on how to best navigate these limitations in practice.

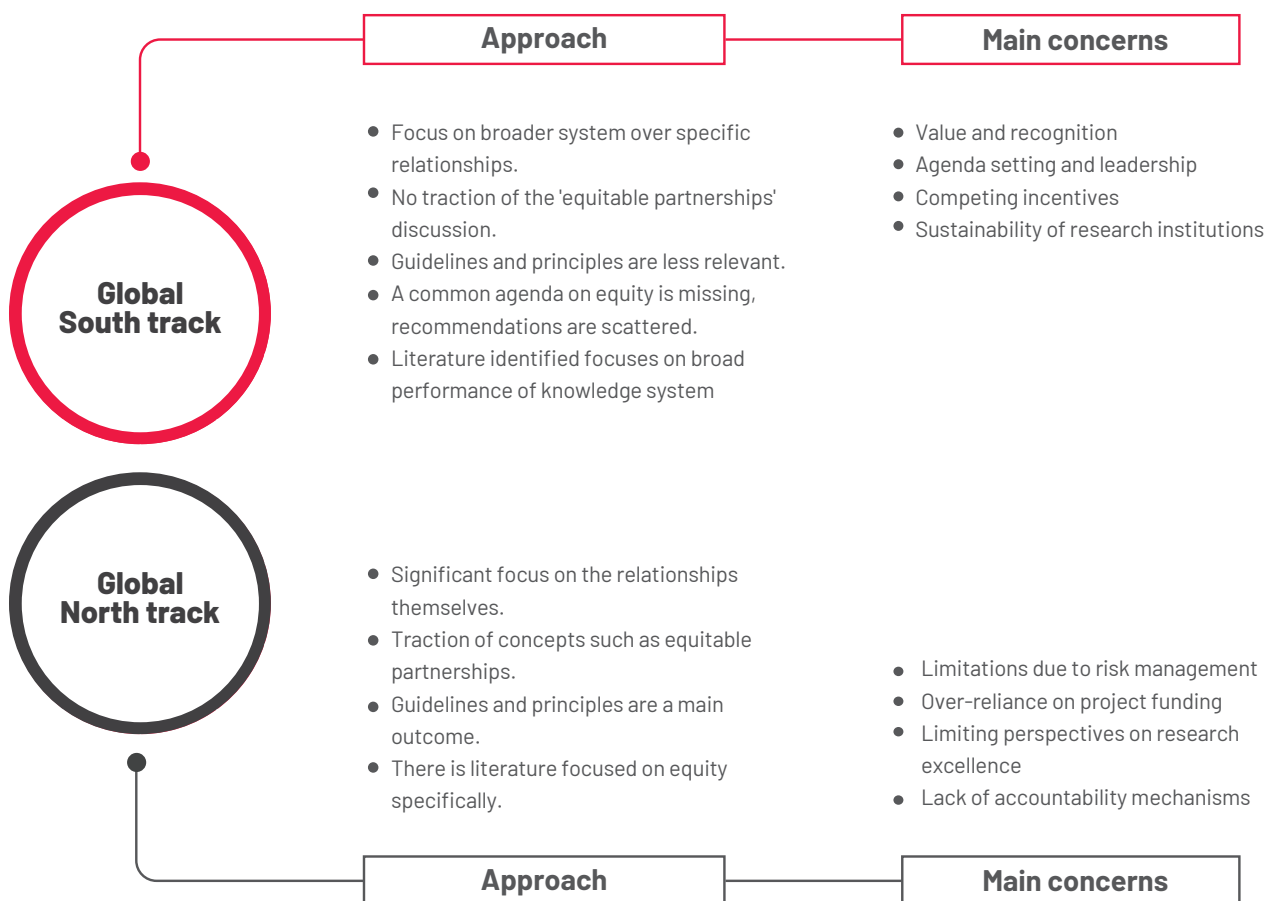
The way in which different actors frame the issue narrows down the solutions identified. Concerns about 'equity' amongst Northern actors and

² "Knowledge systems include the practices, routines, structures, mindsets, values and cultures affecting what and how knowledge is produced and used, and by whom. Formalised knowledge systems are associated with universities, research institutes, non-government and government organisations" (Fazey et al., 2020, p.5).

institutions are expressed predominantly in the language of 'relationships' and 'partnerships', and focus on shifting the composition and functions of these. The proliferation of guidelines and principles shows a willingness among many Northern actors and institutions to take part in changing the dynamics of research relationships. Still, identifiable actions have tended to stop short of more substantial challenges to systems and structures of unequal power. It is concerning that in many cases, even the guidelines and principles sideline the opinions of actors from the Global South. At best, the guidelines draw on these perspectives as part of consultations by Global North actors, who may or may not engage further with Global South actors after the consultation.

On the other hand, the perspectives of Global South actors transcend immediate concerns of equity to address broader issues. They are often concerned with the limited ways in which knowledge generated under the current 'rules of the game' of research is truly transformative in terms of shaping the realities and needs of their own countries. They also highlight the multiple ways in which inequities in power, resources, and access constrain the positive impacts of research on outcomes associated with progressive social, economic, and environmental change, especially for those individuals and communities who are at most risk of being left behind by wider development processes.

Figure 1. Summary of two-track findings



Note. Elaborated by the authors.

Main challenges and issues: Global South

The main concerns detailed here emerged through a literature review and engagements with Global South research actors.

1. Relatively low recognition accorded to research originating from the Global South within the global development knowledge ecosystem:

Researchers from the Global South frequently describe practices that undervalue and exploit their work. For example, they often find themselves relegated to data collection tasks without opportunities for meaningful engagement in the theoretical and conceptual aspects of the research. Furthermore, their work is often unrecognised through authorship or acknowledgements in the final research outputs. The dominance of certain research and knowledge paradigms originating in the Global North that have spread throughout the entire knowledge ecosystem exacerbates this, as innovative proposals outside these paradigms are less valued.

2. Limited role of researchers from the Global South in setting knowledge agendas:

Many actors from the Global South highlight their limited participation in setting research agendas and in exercising leadership within specific projects and broader funding structures. Despite their expertise, Global South researchers often find themselves marginalised in decision making throughout the research process. Research institutions also sometimes make a deliberate decision not to challenge the power that funders hold, since these institutions are often in a precarious position, and may risk disappearing if funding dries up when they are perceived by funding agencies as being 'difficult'. The marginalisation of Southern researchers limits the extent to which the research produced is aligned with context-specific needs which, in turn, limits its impact.

3. Competing incentives: The various incentives researchers respond to may lead to less impactful collaborations. For example, Northern researchers often need to publish in reputed international journals, which drives research collaborations in which Southern researchers are involved purely in data collection roles, as noted above. Southern researchers face similar pressures within their institutions, which may lead them to engage

in projects focused on publishing internationally, even if they do not feel the project is relevant to the priorities of their context. Researchers saw this lack of clarity regarding research aims as stemming from contradictions at the policy level, as many countries have policies that highlight the social value of research, but at the same time fund incentives at the institutional and personal level to publish internationally. At the end of the day, these contradictions limit the impact of research endeavours, the capacity of researchers to develop independent research agendas, and the development of nationally relevant knowledge sectors.

4. Partnerships that do not increase the sustainability and long-term impact of organisations and institutions in the Global South:

Global North-South collaboration may be extractive or increase dependence on Northern funding and expertise. Consequently, research collaborations rarely bring benefits that directly strengthen research institutions within the Global South. Furthermore, collaborations can potentially increase the dependence of research institutions on Global North resources, including funding, equipment, and methodological and theoretical skills. Furthermore, the usual short-term contracting arrangement keeps researchers and institutions in a constant fundraising cycle for specific projects and responding to the priorities of Global North organisations.

Main challenges and issues: Global North

The parallel approach in the Global North focused mainly on research funders, and identified the following concerns:

1. Limitations posed by risk management:

Global North actors interviewed viewed 'risk management' as a significant barrier to innovation and transformative change. Specifically, there are entrenched risk-averse tendencies within donor organisations and established research institutions. These stem from, for example, concerns around avoiding misuse of funds through corruption or the use of resources for unintended purposes, avoiding association with organisations involved in terrorism or crime, or more basic concerns around achieving value for money for key stakeholders. While the ever-growing array of policies and

practices intended to manage and mitigate risk are important, they are also perceived as presenting obstacles to achieving greater equity. Changing core policies and practices appears to be more difficult when the organisations involved in supporting or undertaking research for development are inherently risk averse.

2. Overreliance on a project-based model to fund and organise research activities: Funding arrangements linked to aid programmes and the 'projectisation' of research remain key determinants of equity in partnerships. Several Global North research actors lamented the practical challenges inherent in such approaches, particularly concerning coordination, policy impact, bureaucratic hurdles, and accountability mechanisms. Project-based models, where funds are mainly administered by Global North institutions, face time and budget constraints. This reduces policy impact by hampering cutting-edge research that requires a more flexible and adaptive approach from funders. Bureaucratic proposal requirements, lengthy bidding processes, and opaque funding application processes pose significant challenges for researchers globally.

3. Constraints imposed by perceptions and metrics of research excellence: Conceptions of research excellence shape how partnerships are assessed and funded. Research for development tends to be 'impact driven' and linked to aid priorities. These tend to favour those who have successfully accessed resources previously and met long-standing definitions of 'excellence'. This situation is maintained through biases in review panels and processes. Persuading research funders to change their core policies and practices around research excellence requires (again) reimagining and embracing different understandings of risk.

4. Lack of robust accountability mechanisms and avenues for evidence and feedback: There is very little tangible information regarding the practical application of the guidelines and principles developed by various organisations, highlighting the need for enhanced transparency and accountability in promoting equitable research practices. Current accountability mechanisms in the research for development field tend to serve the needs of funders and powerful institutions and organisations based in the Global North much more than it does the needs and demands of Southern actors

and institutions. Calling for 'more accountability' is insufficient; instead what is needed are new accountability processes that target the systemic and structural drivers of inequity in knowledge ecosystems, and that involve Southern researchers and communities more directly as agents of change (Nelson et al., 2018).

Converging inquiries: Where Southern and Northern perspectives meet

While differences exist between how the broad Global South and North communities understand the issues, aiming for consensus does not necessarily offer the most productive way forward. Instead, a framework that enables a range of actors to align their actions, while keeping the focus on Southern priorities, may equip them—as a collective—to engage in proactive conversations about potential avenues for change.

Many actors across different roles and organisational types are concerned with power imbalances between the Global South and North. Equally, there is a growing sense that these power imbalances need to be addressed. Acknowledgement that the unequal distribution of power remains a key underlying feature of knowledge systems sets the scene for possible collaborations and opportunities for change.

Power in this context refers to the ability to act and enforce a decision, and to influence the outcomes of a specific partnership or the broader system. Different actors exert power through formal authority, controlling resources, and participating in agenda-setting processes. Powerful actors see themselves as a legitimate voice in these processes. Rebalancing power involves redistributing authority, resources, and opportunities for engaging in agenda-setting processes. Southern actors and institutions must see themselves as part of this change agenda. We describe this as system-level change, which requires long-term effort, coalitions and new investments. The question of individual and institutional agency is crucial, and our study has revealed that actors in the Global North and South perceive their roles, prospects for participation and leadership, and ability to effect change, very differently.

In the Global North, many actors focused on their limited agency, regardless of the level of power they held, to make decisions and contribute to change. In interviews and consultations, we found that even those individuals with an ostensibly high degree of decision-making power within funding organisations understood themselves as having limited ability to effect meaningful institutional change, and even less so system-level change. In a Southern context, we found that actors were highly skilled in ensuring the survival of their organisations in a competitive and precarious landscape, expressing their agency and sense of empowerment most clearly in their capacity to form coalitions and develop solidarity with similarly positioned institutions to push for substantive change. Our study revealed a range of tactics used to overcome the limitations imposed by an inequitable system that restricts their ability to do meaningful work.

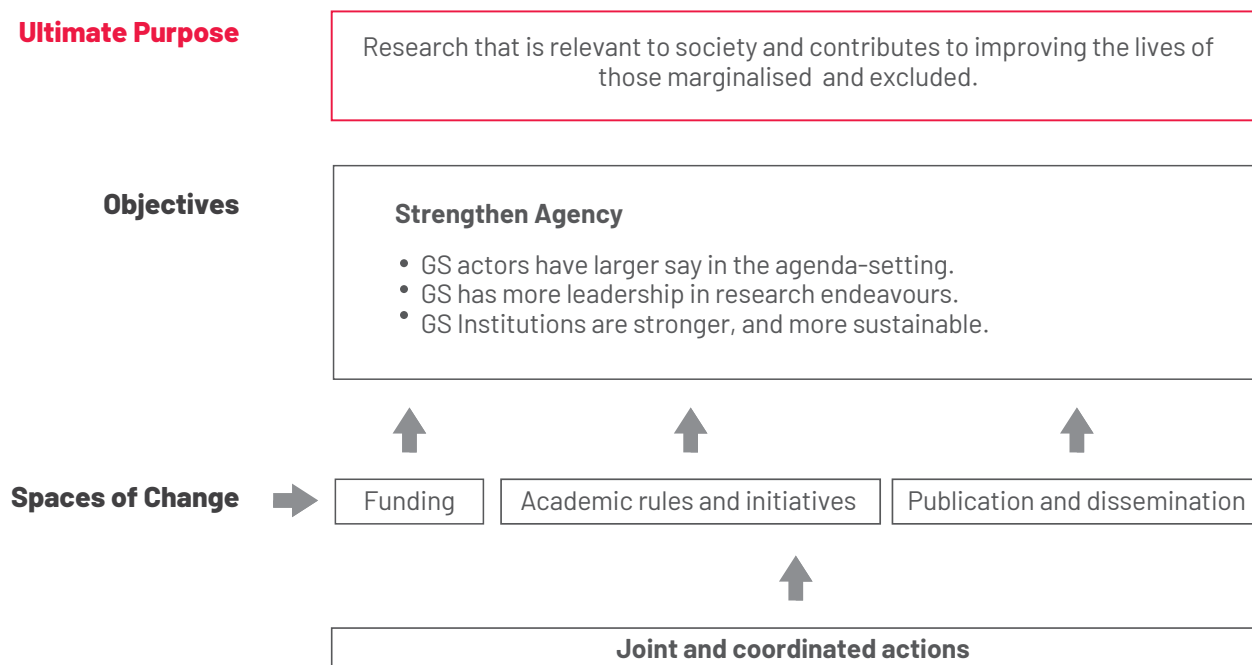
In sum, regardless of the authority an individual may hold within their institution, and the degree of

change they might be willing to drive, a core power differential between countries and institutions persists, which perpetuates systemic inequalities.

Propelling change: A framework grounded in Southern priorities

Rethinking current approaches through a framework developed in the South, grounded in the perspectives of those who have often been excluded from the 'equitable partnerships' conversation in the past, could allow more significant transformation to take place in the research for development sphere and beyond. This framework must also give room to actions across various organisations and communities in both the Global South and North. Therefore, it must provide several entry points to a range of stakeholders committed to collaboratively rebalancing power in the knowledge ecosystem. Figure 2 summarises the two strands of inquiry and proposed framework for future action.

Figure 2. Framework summary



Note. Elaborated by the authors.

Ultimate aim: Research with a purpose

The foundation of this framework is a joint purpose. Contrary to frameworks focused on equity as an ultimate goal, one grounded in Global South priorities must prioritise the advancement of research ecosystems that are socially relevant and that uplift marginalised communities. Improving equity within the research for development ecosystem is a stepping stone to achieving broader societal goals. A common framework for action is needed to encourage stakeholders to unite around an overall goal which has not been predetermined by the priorities of Northern actors, particularly funders. At its core is the generation of evidence that is better able to have an impact on policy and practice, and to support citizens worldwide, particularly in the Global South.

Collective objectives: Strengthen agency

To achieve the aims of this new framework, progress needs to be made on the redistribution of power. This means resources, authority, and access being better distributed between Global North and South, through actors engaging and cooperating across the North/South divide. Change in this regard, which depends on structural changes that help to rebalance power asymmetries, is observable in the more robust agency of Global South research actors, for example:

- Global South actors have an honest and pragmatic role in defining research agendas and priorities at different levels.
- Southern leadership is more frequently observed in institutions, projects, and spaces where evidence is generated, shared, debated, and communicated.
- Research institutions in the Global South are stronger, more sustainable, and have greater decision-making independence. They are also able to develop and strengthen their position within national, regional, and global knowledge ecosystems.

Spaces of change

Moving from a framework for action towards concrete change requires identifying spaces where actions can occur and are most likely to have a positive effect. This is the core principle of

agency. The vision of a more balanced distribution of power among Global North and South actors requires focusing on the underlying structures that currently enable, perpetuate or even promote inequitable relationships and practices. Focusing on these structures acknowledges that current inequities are not only caused by an institution or actor making specific choices, but are fundamentally all driven by structural causes. Through an analysis of the perspectives gathered through the present initiative, three key spaces of change emerge:

- Research funding
- Academic rules and incentives
- Dissemination of research and publications

It appears possible to bring about broader systemic changes aimed at the redistribution of power within the knowledge ecosystem by pinpointing specific opportunities for change within these spaces. The development of indicators that can help to demonstrate the extent to which change has happened is also essential as a basis for accountability, learning and adaptation. These spaces are invaluable entry points for actionable initiatives to reshape power dynamics and foster greater inclusivity. It may then be possible to influence the existing 'rules of the game' and profoundly impact how relationships unfold and strengthen, based on building key actors' agency.

We understand agency and structure as dynamically interconnected, so that while initial changes in these spaces for change can spark an increase in agency, proactive actors in the Global South can also support systemic changes. To address deeper structural issues and power imbalances we need to transform the sector through reflective and action-oriented thinking aimed at bringing about concrete changes. Since the ultimate goal is to have a research space that is contextually relevant, there is a need for a synergistic approach. Collaborative efforts can help achieve the desired shift through building coalitions, and bringing together and steering discourse, particularly towards Global South priorities. This all requires effective engagement, debate, and collective reflective actions across spaces of change.

Action within spaces of change

Research is produced through actions and decisions across a complex knowledge system. The three spaces of change presented are amenable to actions that can lead to structural changes which have a long-term impact on the equity of research systems, and in turn support greater agency of southern actors. These spaces are interconnected, but we present them here separately to organise discussions and actions moving forward. These are spaces of interaction between different actors in the system, and as such, all these actors could directly or indirectly affect these spaces and promote reform. For example, while their main role is in the funding space, funding institutions also

impact academic rules and incentives, and how research is disseminated and published, through the rules embedded in their funding practices.

In the same way, researchers can influence academic rules and incentives and help shape funding practices. Through conversations and discussions held through this initiative with actors from both Global South and North over the last year, we identified several ongoing actions. Each space is active, and stakeholders work to evolve or reform it. However, these actions are not always explicitly linked to an equity in agency agenda. Ensuring that reforms recognise the need for equity is essential for promoting change.

Actions relating to research funding

"If funding is not domestic, how can we think of it being equitable? It's not equitable from the moment it comes from outside!" (Frejus Thoto, co-founder and director of ACED at SV Conference Nairobi, 2023)

An ultimate goal within the funding space would be to expand and diversify funding sources for research for development, including increased spending from public and private actors in the Global South. The low spending on research in the Global South is a barrier to adequate support being given to research which is relevant to these societies. This low spending poses a challenge for Southern researchers with limited resources, often raising doubts as to the sustainability of research. While some government structures exist for research funding, these are usually insufficient, leading to dependency on external sources which are discretionary and tied to geopolitical narratives. However, the goal of increasing Southern research funding will take time to put into practice. In the meantime, funding practices in the Global South can evolve within the current structures, and in ways that avoid replicating the common power imbalances experienced by Southern researchers when receiving support from Northern funders.

Some practical avenues for action have already been explored and mapped, with exciting examples emerging. They represent opportunities for change

within funder organisations, research institutions, and intermediaries to reduce the gap between donors and research organisations in the Global South, enabling more direct and equitable funding and more inclusive priority setting, and include:

- **Alternative agenda-setting mechanisms**

The **African Education Research Funding Consortium (2022)** developed its core agenda through extensive consultation with researchers from a range of backgrounds and career stages. The consortium's current agenda and joint work are based directly on the priorities identified with African researchers. While this process did not identify thematic priorities, this initiative exemplifies alternative mechanisms that funders can adopt to broaden their understanding of critical issues and effectively prioritise actions.

- **Knowledge intermediaries to reduce the gaps between funders and researchers**

There are a number of intermediary organisations that exist as standalone organisations, networks or partnerships and can play a crucial role in knowledge co-creation, demand-driven capacity building, managing consortia, and de-risking work. Examples identified include the Global Development Network, the Partnership for African Social and Governance Research, the African Economic Research Consortium, the Economic Research Forum, UNESCO Knowledge for Change, the K4C Consortium, On Think Tanks, the African Population and Health Research Centre, the Climate and Development Knowledge Network, scalingXchange, INASP, START, the Adaptation Research Alliance (ARA) and the Latin American Council of Social Sciences (CLACSO) (Obino, 2023; de Haan, 2023).

- **Proactive Southern agendas**

Researchers in the Global South have also proactively promoted dialogue among themselves to identify shared, relevant agendas and communicate them to funders. For example, the research team of the study “Landscape analysis to inform international evaluation in the service of equity” (Global Change Center, Praxis UK, & Praxis Institute for Participatory Practices, n.d.) involved only Southern researchers and consulted with a broader group of Southern stakeholders. Based on this, they present an agenda to reform evaluation practices. The recently launched Africa Charter for Transformative Research Collaborations (2023) is an interesting ‘border-crossing’ example where African scholars based in a UK university have developed an initiative to decolonise research for development, in close collaboration with African academics.

- **Funding Southern institutions directly to challenge the primacy of research partnerships**

Some funders have challenged the assumption that research partnerships are

the sole means of achieving quality research, and have instead begun experimenting with direct and flexible funding. One model of this is the Think Tank Initiative (2009–2018), which provided flexible financing for a group of think tanks across Africa, Asia and Latin America (Think Tank Initiative, n.d.). In the same vein, the African Union, with a 50 million USD grant from the World Bank, is setting up a platform to help think tanks across the continent produce policy-relevant research on critical cross-border priority issues (African Union, 2024).

Additionally, the Rethinking Research Collaborative (RRC) was a global multi-stakeholder network that aimed to promote more inclusive and responsive collaborative research. Those involved decided to end this initiative for the following reasons: “Building on our collective commitment to decolonising international development as well as our research, which increasingly called into question the value of ‘research partnerships’ over and above more sustained investment in research systems in the global South, in 2021 we took the decision to disband the RRC as an expert network and instead to support the ongoing work of our southern-based partners” (RRC, 2023).

- **New or reformed funding mechanisms**

The Canadian Institutes of Health Research (CIHR) has restricted funding pools targeting early career researchers so they can develop authentic partnerships. They also create openings for researchers who were unsuccessful with a proposal to bid to gain funding for a year of work, during which they can develop an idea and relationships with partners before submitting another proposal (key informant interview, 7th July 2023). The UK’s Arts and Humanities Research Council has introduced practical ways to achieve greater inclusivity in responses to calls. They believe that there is not a linear relationship between age and expertise (since equating age with expertise may be one factor that promotes inequitable partnerships across age groups), and so have changed the qualifications required for proposals, allowing

for diversity in people's lives and realities, including along lines of class, gender, age, ability, income, location, mental ill-health, and other factors. They are also changing how much funding goes towards non-academic institutions, aiming to eventually allocate up to 50% of research funding to non-academic partners (key informant interview, 2023).

- **Build trust through common standards**

The Global Grant Community, a platform of the African Academy of Sciences, revolutionises the traditional grant funding model by streamlining the process for funders to identify reliable partners. The implementation of the world's inaugural international Standard for Good Financial Grant Practice (ARS 1651) establishes a universal benchmark for effective grant management practices, ensuring that recipients have robust practices. Beyond increasing trust between funders and recipients, adopting a global standard empowers grant recipients to improve their grant management systems.

The standard is already showing exciting results but requires wider adoption, including among organisations in the Global North and other regions of the Global South (Harste et al., 2021).

- **Emphasising the positive benefits of taking risk with new partnerships at the grant-making phase**

The Research Council of Norway has, for the last four years, addressed the risk that research partnerships may become inequitable. They have approached this by including in their calls requirements that researchers submitting bids show clearly: 1) how they plan to share the budget, with an equitable sharing of funds and costs; 2) their plans for equitable sharing of intellectual property and credits; 3) concrete plans for strengthening individual competence and individual capacity in the partner institutions; and 4) co-leadership with scientific researchers (KII Norwegian Research Council 23 June 2023).

Actions relating to academic rules and incentives

"In universities, promotions are pegged on Northern journals, or they score higher than Global South journals. This is changing in some African countries like South Africa and Kenya, where lecturers are advised to have 50% of the reference lists on course outlines from African scholars to promote African scholarship, internationalise higher education and decolonise erroneous notions held about African publications being mediocre." (Truphena Mukuna, Executive Director OSSREA, Workshop in Nairobi, 2023)

The incentives and rules applied in universities across the Global North impact Global South knowledge systems in at least two ways. First, these rules and incentives permeate research systems in the Global South through national policies on science and technology, or where internal policies in research institutions copy the incentives in the Global North. Second, researchers in the Global North, incentivised by the current expectations and requirements, perpetuate unequal relationships through practices geared toward the career incentives they face. In essence, many incentives normalise an unfair division of labour where many

Southern scholars are, for example, tasked only with data collection. At the same time, their Northern counterparts define research questions, select methodologies and theories, and ultimately author research papers (the majority of which are written in English) that can advance their careers. It is likely that unless these incentives and rules are changed, the guidelines and principles for equity promoted by organisations in the Global North will have little impact.

Some practical avenues of action have already been explored and mapped, with exciting examples

emerging. They exemplify how greater diversity of knowledge, voices, methods, and approaches in assessing research proposals can avoid transmitting risks to researchers. This debate is taking place worldwide, where clear opportunities for collaboration exist across the Global South and North:

- **Research assessment practices that define the impact from the Global South**

In Latin America, there are different initiatives that reframe research evaluation. For example, the Latin American Forum on Research Assessment (FOLEC-CLACSO) is a space for debate on the meanings, policies and practices of research assessment processes in the region (Vélez Cuartas et al., 2021). The Centre for the Study of the Circulation of Scientific Knowledge (CECIC-Argentina) has developed a set of analytical indicators of research circulation included in the “Cuyo Manual” (Algañaraz et al., 2023).

- **New quality and excellence frameworks among funders**

IDRC has generated “Research Quality Plus,” (Ofir et al., 2022), a valuable framework for expanding understandings and assessments of research quality. Some funders, such as the CIHR in Canada, and a wide range of academic institutions, have also signed up to the Declaration on Research Assessment (DORA), which recognises the need to improve how researchers and the outputs of scholarly research are evaluated.

- **Addressing accountability mechanisms**

A positive step towards improved accountability may involve removing disincentives in institutions that discourage equity (e.g. career pathways in higher education systems, or individualised entrepreneurialism that discourages collective approaches). In the Netherlands, funding policies for collaborative research aim to promote joint research initiatives, with equal or substantial shares in Southern countries. However, it was noted that Northern universities may try to play the

system by setting up mirror institutes in the partner country, often run by a white European. Indeed, this is another reason for peer monitoring to be an important tool for **building mutual accountability mechanisms**, for example Northern institutions may act as ‘watchdogs’ for each other, alongside efforts to shift polarities of accountability, with greater accountability of institutions in the global North to those in the South.

- **Accountability towards users whose interests research is intended to serve**

In the UK, efforts are currently being made to influence how funders perceive quality, particularly in the Global South. Southern researchers are often contracted on a consultancy basis and may be at the mercy of the decisions and practices of funders and Global North research partners who do not treat them as equals, and feel they have little power to set their priorities. It is important to reflect on how quality is captured in research processes as well outputs, especially in engaged research with communities. This would require a shift in accountability ‘downwards’ around intentions, values and ethics, broader interpretations of excellence, and shifting accountability towards the ultimate purpose of the work—the community who experience the challenge—rather than ‘upwards’ to the funder who commissions the research.

Dissemination of research and publications

“It no longer matters what your research content is; what matters is where it is published.” (Interview with researcher in the Global South)

The dissemination of research and the rules of the game around academic publications mediate which knowledge is made visible, how it is used, and by whom. It is also a space in which a small number of companies based in the Global North have consolidated a large amount of power in a primarily commercial enterprise, which reduces opportunities for actors in the Global South to get published and to access knowledge, even knowledge produced within their countries. In fact, “five for-profit publishing companies—Elsevier, Springer Nature, Wiley Blackwell, Taylor and Francis, and Sage Publications—dominate the market, generating more than 50% of revenues (over 7 billion USD in 2022) with profit margins up to 38 percent higher than big tech companies” (Gulliver & Drake, 2024). Moreover, most of these publications are predominantly in the English language, leading to an active exclusion of ideas, knowledge and perspectives coming from other languages.

Furthermore, given that the editorial boards of journals considered high impact are primarily from academic communities in the Global North, concerns emerge around how far the research published aligns with policy priorities in the study regions. With publication in these journals increasingly tied to career advancement, Southern researchers face an unfortunate trade off between working towards societal change or prioritising their academic careers, and sometimes find themselves achieving neither. Furthermore, publishers also develop databases to provide access to academic literature and track research outputs. Many scientific production and collaboration metrics rely on these databases which are skewed towards Northern publications. For example, the OECD bibliometric indicators use Elsevier’s Scopus database data (OECD, n.d.). Worryingly, these metrics inform policy development and assessment worldwide, which only exacerbates existing biases.

While movements such as open access and open science are revolutionising practices in these

spaces, these movements have traditionally been disconnected from discussions around equity. Only some actors involved in equity debates were aware of the actions taking place in the open access space, highlighting the importance of working across these spaces of change. Transformative actions in this space include:

- **Shift funding away from for-profit publishers**

For profit publishers have been charging article processing charges for open access publications, and so the objective of reducing the barriers to access to knowledge have become barriers to publishing. The Bill and Melinda Gates Foundation has announced a change in policy, and will no longer cover fees known as article processing charges (APCs) for publishing open access (Torok, 2024). Instead, they will require that grantees share free preprints of their articles. This policy change has the potential to drive changes in the science dissemination space by encouraging the development and use of non-commercial research dissemination infrastructure.

- **Alternative infrastructure to replace large-scale, for-profit publishers**

Increased investment in alternatives to paywall databases, including open repositories held within libraries, universities, and research institutions worldwide could be particularly useful. There is a long tradition of open-access repositories in the Global South, including Redalyc and SciELO in Latin America, and AJOL in Africa. Emerging collaborations among these repositories strengthen infrastructures to enhance global access to research, and facilitate easier discoverability across regions. In Latin America, La Referencia brings together open-access repositories in twelve countries, while the Confederation of Open Access

Repositories is enhancing collaboration at a global level.

- **New data sources for bibliometrics**

Metrics used to assess career paths, science and technology policies, and research activities need to be revised, challenging reliance on centralised models of publishing by identifying and promoting new metrics that provide a more comprehensive understanding of research productivity and impact. For example, OpenAlex is an open, non-profit project, larger than other for-profit databases, that currently indexes over 240 million scholarly works. A recent study found this open data performed well in representing research, particularly that produced in the Global South (De Castro, 2024).

Conclusions

Even though the need for evidence in tackling a wide range of global development problems is widely recognised, multiple structural challenges still prevent the global knowledge ecosystem from reaching its full potential. Fortunately, many key stakeholders are committed to addressing these challenges and there is now real momentum for achieving change. However, entry points for these stakeholders and their ability to act vary greatly depending on context, and on the extent to which they believe they have the agency required to bring about change in the face of myriad structural constraints that perpetuate many forms of power imbalance.

This synthesis paper has focused on the need for a Southern-led set of perspectives and potential actions to reshape the research for development arena. The results of our two-strand inquiry have shown that definitions of the problem and the core objectives vary considerably according to where actors are positioned in the system. In the case of many Southern researchers, research for development is not even understood as a 'field of practice' in the same way that many Northern actors and institutions frame it. The capacity to make space for diversity and divergence in perspectives is crucial in developing the types of collaborations and dialogues required for meaningful shifts in power, and the advancement of equity in research.

A key challenge is sustaining the current drive to bring about structural and systemic change, in the face of the common tendency to default to tokenistic or superficial actions. There is much still to explore in terms of the required actions described above, yet it is encouraging to note that changes are indeed taking place, albeit often in disconnected ways and with little evidence of outcomes and learning stemming from specific actions. This is an area that needs continued attention. Nonetheless, identifying spaces for change within critical areas such as funding, academic incentives, and dissemination of research offers promising avenues for promoting equity and inclusivity within the research for development knowledge ecosystem. Efforts to bring about change will continue, and the chances of success will depend greatly on the momentum created through collective strategies and actions, and ongoing mutual learning and knowledge exchange. Significant systemic change will also take time, and identifying a series of iterative steps towards a reshaping of the global knowledge ecosystem may help by offering 'lower-hanging fruit' and short- to medium-term goals which—if achieved—can reinforce a sense that real change is indeed within reach.

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Annex 1. Methodological note

This paper uses the terms ‘Global North’ and ‘Global South’, while recognising that these terms fail to capture the complexity of research for development relationships and networks that cross boundaries between these divides. Nonetheless, this division enabled us to take distinct approaches that each research team felt were the most meaningful. Here, we summarise each approach.

Global South track

The review of literature from the ‘Global South’ side was looked at from a regional perspective to capture the different stages in which this discourse has been evolving in the three regions. A rapid literature review was undertaken to understand the conversation and scholarly discourse on related terms. Literature was analysed from the perspective of the current state of scholarship and its evolution through the years. Online available resources in three different languages (English, French and Spanish) were consulted. The diversity of languages provided an opportunity to capture diverse perspectives from the three regions where Southern Voice membership operates (Asia, Africa, Latin America & the Caribbean). Some of the keywords used to find relevant articles on Google scholar and other open access digital libraries were “research partnerships/collaborations”, “state of social science research in Asia/Africa/Latin America”, and “decolonisation of knowledge”.

Primary data was also used to complement the literature review exercise. The Southern Voice team conducted a series of key informant interviews and focus group discussions between May 2023 and September 2023. These online interviews and discussions were conducted via Zoom and in three different languages - English, Spanish or French depending on the primary language of the participants. In total, there were 18 respondents from SV member think tanks, and 20 researchers and experts from across the Global South regions. These respondents were selected based on their expertise and experience in the development research space, including some specific respondents who were experts on decolonisation studies, research partnerships, development cooperation, etc. These online consultations, which lasted from 1 to 1.5 hours, were conducted by Andrea

Ordóñez, Geetika Khanduja, and Tracy Mamoun and were semi structured. Topics covered included general perceptions about research partnerships with Global North partners, challenges therein and recommendations to improve partnerships and the development research space.

Southern Voice also conducted two in-person events during the Southern Voice Conference held in Nairobi in October 2023. The workshop and the parallel sessions brought together Southern Voice members, researchers working on similar topics on IDRC supported projects from East Africa, and representatives from key funding organisations. These sessions provided useful feedback as well as additional insights to enrich the findings before the final analysis of the scoping phase.

Some of the key limitations of the scoping phase were the rapid nature of the literature review exercise, and the limitations posed by conducting the interviews online. Online interaction sometimes made it difficult for respondents to really open up and talk about their experiences. Also important to bear in mind is that Global South can not be taken as a monolithic entity; there are variations throughout the region, as evidenced in the literature review as well as the interviews.

Global North track

A rapid review and institutional mapping were undertaken to determine how key funders and research institutions in the Global North are currently framing 'equitable partnerships' and related terms. The rapid review was undertaken using the University of Sussex Open Search Engine, Pub Med and Project Muse using keywords such as "decolonising development", "power + research + development", "localization of research", "epistemic justice", among others. Google searches were also used to supplement these searches to ensure relevant grey literature was also captured. Snowballing was also utilised, looking at references of references. Results were filtered by date range (2010 to present), to ensure a focus on Northern institutions and Northern authors, and to focus on the relationship between research partners (including donors and decision-makers and their partners), not between researchers and research subjects. A total of 50 papers were identified, of which 20 were selected as most relevant to the

aims of this rapid review after a scan of the title and abstract.

The institutional mapping exercise looked at key donors, research organisations and think tanks in the Global North. Organisations were identified through discussions with partners and relevant organisations, as well as through the team's knowledge. Institution web page searches were undertaken using keywords to identify relevant documents and information. Only English-language resources were explored in both the literature review and the institutional mapping, which may have limited the results. The authors also recognise the limitations of looking at a single snapshot of an organisation to explore these complex issues, as many funding organisations may be reacting to recent events, as is evidenced in the adoption of equality, diversity and inclusion-related strategies and language by institutions in the last few years.

The results of the literature review and institutional mapping were complemented by a series of key informant interviews conducted via Zoom between April and September 2023, with a total of 18 individuals. These individuals were selected because of their positions as leaders within the research for development space (within their institutions, and as named authors within key documents and guidelines reviewed or as recommended by other key stakeholders in the research for development space). These interviews lasted on average from 1 to 1.5 hours, and were conducted by Prof. Peter Taylor and Dr. Erica Nelson; they were semi-structured and covered questions relating to power dynamics, actions for change, lived experience and reflections on discourse and language in the research for development field of practice.

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Synthesis paper

Founded in 2013, Southern Voice is a network of think tanks from Africa, Asia and Latin America & the Caribbean. It contributes to the global dialogue on the UN Sustainable Development Goals (SDGs). Southern Voice's ultimate aim is to address the existing 'knowledge asymmetry' and 'participation deficit' in the development dialogue. It does this by producing, promoting, and disseminating evidence-based policy analysis by researchers from Global South countries.

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