

# EQUITABLE RESEARCH PARTNERSHIPS BETWEEN GLOBAL NORTH AND GLOBAL SOUTH RESEARCH COLLABORATORS: Making it Happen

## GUIDANCE NOTE

# Acknowledgements

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## Humanitarian Horizons 2021-2024

Humanitarian Horizons is a three-year research initiative that adds unique value to humanitarian action in the Indo-Pacific by generating evidence and creating conversations for change. It is supported by the Australian Government through the Department of Foreign Affairs and Trade.

The research program for 2021–24 builds on the achievements of the Humanitarian Horizons pilot phase (2017–18), the previous iteration of the program (2018–21) and Humanitarian Advisory Group's experience in supporting the sector for almost 10 years. The research is structured into three interlocking streams: 1) Power, People and Local Leadership, 2) Greening the System, and 3) Real-Time Analysis and Influence. It is underpinned by a fourth stream that considers governance, accountability, and monitoring, evaluation and learning processes.



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## About the partners

**Collaborate Consulting Pty Ltd (CoLAB)** is a Fiji-based development consultancy company that has delivered projects with diverse partners in the Pacific, Asia, Africa and Europe. CoLAB's vision is to achieve localised responses to development that are inclusive and sustainable, enabled through genuine collaboration amongst all partners.

**GLOW Consultants**, based in Pakistan, is a leading national entity providing practice solutions and field implementation support to donors, their implementing partners and research institutions. GLOW has successfully completed more than 100 third-party monitoring and evaluation assignments.

**inSights (the Institute of Innovation for Gender and Humanitarian Transformation)** is a Bangladesh-based social enterprise providing insights that challenge the current ways of working in humanitarian aid and gender affairs. inSights aims to transform ideas within the humanitarian, social and businesses sectors, turning them into innovations, knowledge and strategies.

The **Pacific Islands Association of Non-Governmental Organisations (PIANGO)** functions as a regional secretariat to a network of umbrella organisations or platforms that are registered in 24 countries, territories and states across the Pacific region. PIANGO aims to be a catalyst for collective action, to facilitate and support coalitions and alliances on issues of common concern, and to strengthen the influence and impact of nongovernmental organisations' efforts in the region.

The **Pujiono Centre** is a not-for-profit company established by disaster management practitioners in Indonesia as a new modality, institutional arrangement, and platform for obtaining, sharing and disseminating knowledge about disaster management by supporting evidence-based assessments for policymakers.

**Humanitarian Advisory Group (HAG)** was founded in 2012 to elevate the profile of humanitarian action in Asia and the Pacific. Set up as a social enterprise, HAG provides a unique space for thinking, research, technical advice and training that contributes to excellence in humanitarian practice.



# Introduction

The localisation agenda, and growing recognition that some traditional research practices undermine local knowledge holders and producers, are driving changes in the way research is developed, produced and shared. Power inequalities in the humanitarian sector influence the way Global North and Global South actors build and engage in research partnerships.<sup>1</sup> Global North organisations still dominate the commissioning and leading of research.<sup>2</sup> When research partnerships do exist, Global South actors are rarely meaningfully involved in research processes other than data collection.<sup>3</sup> This lack of equity means internationally driven knowledge is valued more highly than local or contextual knowledge, and that research is largely extractive and has minimal mutual benefits.<sup>4</sup>

There is growing momentum across the sector to overcome entrenched power dynamics in knowledge production and perceptions about whose knowledge matters. There is also an increasing focus on more collaborative research processes, particularly through strong partnerships between Global North and Global South actors.<sup>5</sup> Strengthening partnership practices across the humanitarian research landscape can promote more equitable design, implementation and sharing of research.

Equitable research partnership can be defined as:

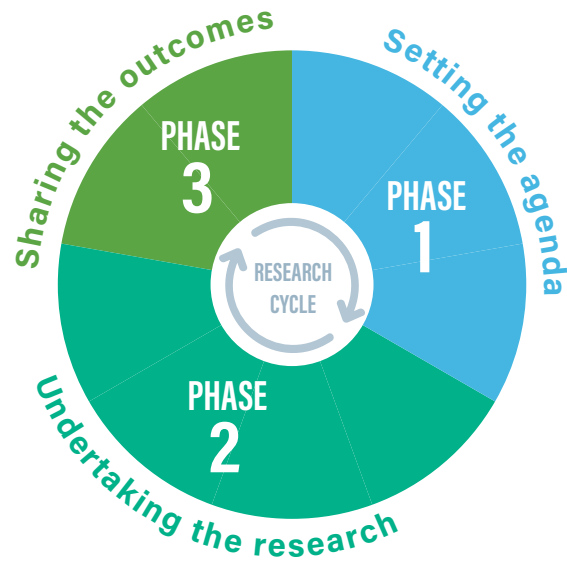
*“Partnerships in which there is mutual participation, mutual trust and respect, mutual benefit and equal value placed on each partners contribution at all stages of the research process.”<sup>6</sup>*

## ABOUT THIS GUIDANCE NOTE

This guidance note can be used to develop equitable research partnerships and knowledge production processes and systems. It focuses on partnerships between Global North and South research actors, and is informed by our collective experience and aspirations as partners. This paper does not address all power imbalances within research partnerships; however, it outlines approaches and actions intended to guide organisations and individuals in their pursuit of more equitable research processes and partnerships. Figure 1 depicts the three phases of the research process that are addressed in this guidance note.



Figure 1 Snapshot of the research cycle



**Audience:** this guidance is intended to support humanitarian research practitioners and users, including research organisations, operational agencies, policy makers and donors.

**Structure:** This paper is structured in line with the above three main phases of the above research cycle. Within the phases of the research cycle there are *activity areas*.



This paper outlines a hypothetical equal research partnership for each activity area, including a series of actions, and examples of good practice and ideas to promote it. Partners can take the actions outlined in this note to improve equity in humanitarian knowledge production. Partners include:

- Commissioning agencies: agencies that finance research and manage contracts
- Global North research partners: research partners (organisations and/or individual contractors) from high-income countries
- Global South research partners: research partners (organisations and/or individual contractors) from low or middle-income countries.

For more detail about the terms used in this note, refer to Box 1 below.

**Methodology:** This guidance was produced through a research partnership between Humanitarian Advisory Group and its five institutional partners across Asia and the Pacific (PIANGO, GLOW, CoLAB, Pujiono Centre, and InSights). The note draws on evidence and ideas from practices we have developed and engaged in as part of our research partnership. It sets the parameters for our collective ambition to build more equitable and accountable practices as partners in producing knowledge and evidence about a more effective humanitarian system.

## Box 1. Terminology

### **Global North and Global South<sup>7</sup>**

The terms 'Global North' and 'Global South' are polarising and contested. They depend on generalising labels such as 'developed' and 'developing', 'high income' and 'low income'. They do not capture the complexity and diversity within and between countries that can reinforce binaries of power, governance and dependence.

We use the terms Global North and Global South 'to distinguish between countries with high income economies (Global North) that have historically dominated the provision of development and humanitarian aid, and countries with middle- or lower-income economies (Global South) ... and have historically been recipients of aid'.<sup>8</sup>

We acknowledge the flaws in using these terms, including the profound differences between countries in each category. They also imperfectly reflect our interest in how affected societies are contributing to localised decision-making through research, analysis and/or evaluation, because not all countries considered part of the Global South host humanitarian operations, and not all humanitarian operations take place in the Global South. Additionally, we recognise that actors may not identify with these categories or may represent both Global South and North institutions.

We believe, however, that these distinctions are important because of the structural inequalities and power differentials that affect knowledge production and access.

### **Local actor**

We use the term 'local actor' where relevant to recognise that Global South partners are not always based in the research country context.

# Phase 1: Defining the problem and setting the agenda






Many big decisions are made in the initial phase of the research cycle. They set the foundations of the project and shape its future, even if scope evolves along the way. For partners, this phase involves collaboratively deciding the research's direction, and how the specific expertise and capabilities of Global North and Global South partners will be drawn on in each phase.

Timelines can vary dramatically. Project scope must often be defined rapidly, with tight turnarounds to develop expressions of interest (EOIs) and submit proposals to commissioning agency deadlines, but longer lead times are also possible. Regardless of the time available, this phase is important for co-developing the parameters of research projects and ensuring agreement and engagement between partners from the outset.

Commissioning agencies have a critical influencing role during the initial phase, and can support equitable partnerships via thoughtful development of calls for proposals, terms of reference (ToRs), and application approval criteria. Box 2 outlines good practices for commissioning agencies in relation to content and accessibility of calls for proposals.

The three activity areas in this phase are:

-  Identifying the need for research
-  Developing research proposals
-  Awarding research contracts

## IDENTIFYING THE NEED FOR RESEARCH: KEY ACTIONS TO PROMOTE EQUITABLE CALLS FOR RESEARCH



**What does success look like?** Calls for proposals are accessible for a diversity of actors, written in plain language and elicit proposals from a diversity of Global North and South actors working in partnership.

### Key action

### By whom?

Examine who is involved in decision-making in relation to the need for and direction of the proposed research. Understand which groups are contributing to these discussions, and how

Commissioning agencies

Consider how input from 'end users' of the research, as well as communities or local actors in humanitarian settings, has been used to shape decisions about the need for this research

Commissioning agencies



Ensure that the commissioners of research understand how local actors and communities can engage with and use the evidence produced	All partners and commissioning agencies
Create opportunities for Global South or local actors in the research context to participate in shaping decisions through joint and one-to-one consultations	Global North partners
Ensure calls for proposals, EOIs and applications reflect equitable research practices (see Box 2 below)	Commissioning agencies
Provide opportunities for local or Global South partners to provide input to ToRs or calls for proposals	Commissioning agencies



### Box 2. Key components of calls for proposals or terms of reference

- 1. Maximise accessibility.** Write the call for proposal in plain language, give examples, provide concrete definitions and translate into local languages (if appropriate). Circulate amongst relevant Global South humanitarian and research networks using multiple mediums (social media, mailing lists).
- 2. Ensure tendering platforms are accessible.** Streamline complex tendering processes and platforms to encourage a diversity of applicants, hold information sessions about the call for proposals that specifically target local and national actors, consider accessibility for persons with disabilities when hosting information sessions.
- 3. Prioritise co-production approaches.** Clearly articulate how the project will prioritise approaches that co-produce research in partnership or collaboration with Global North and South research institutions, including local humanitarian actors where relevant.
- 4. Encourage diversity of applicants.** Encourage applications from partners with diverse skills and experience, including contextual and lived experience in humanitarian contexts.

## DEVELOPING RESEARCH PROPOSALS: ACTIONS TO PROMOTE EQUITABLE SUBMISSIONS



**What does success look like?** Research proposals and budgets are developed in partnership, leverage each partners' skills and capabilities, and are underpinned by key principles and ways of working.



### Key action



### By whom?

If this is a new research partnership, agree on shared goals, principles and ways of working from the outset to guide the ongoing collaboration	All partners
Jointly discuss and plan the proposal development process and ensure all partners can contribute and review the proposal before submission	All partners
Articulate all partners' skills, expertise and contributions to the project clearly. Highlight Global South partners' knowledge and experience	All partners
Agree on and outline each partner's role in the proposal. Assess which partner is best placed to lead contracting and coordination with the commissioning agency, or how a co-lead arrangement could function	All partners





Show how the partnership arrangements and objectives support equitable practices in the proposal, separate to the research project details	All partners
Jointly agree on the budget and breakdown of partner fees. Create a budget that reflects localisation best practices and commitments, including core costs, administration fees and funding targets (see Box 3 and Box 4 below)	All partners
Discuss opportunities for direct contracting arrangements between the Global South partner and commissioning agency	All partners and commissioning agency
Ensure equal representation of all partners in calls and/or meetings with the commissioning agency	All partners and commissioning agency
Scope and reach out to prospective Global South partners when considering developing research proposals, and consider a diversity of organisational backgrounds, expertise and knowledge	Global North Partners
Advocate that commissioning agencies contract and fund Global South actors directly as project leads	Global North partners
Encourage elevation and use of contextual knowledge and practices, as well as experiences, of local or Global South partners in all stages of the proposed research	Global South Partners



### Box 3. Clarity on partnership parameters

The tone and parameters of the relationship should be set at the outset of the proposal development process. All partners can:

- ✓ Develop a clear understanding of why each partner is interested in the proposal, working together, and the objective of the research
- ✓ Develop a short set of principles that set out how partners will work with each other. They may include jointly determined measures of success, the mutual benefits that the partnership will bring, the values of each partner, and why an equitable partnership is important
- ✓ Map the technical research and contextual knowledge that partners bring. Agree on the most effective combination of roles and responsibilities, drawing on each partner's expertise, experience and skillset.



### Box 4. Key components to include in budget development

As part of the proposal process, it is important that partners jointly discuss and agree on the budget and breakdown of partner fees. The budget should reflect localisation best practices and commitments including core costs, admin fees and funding targets including exceeding the 25% commitment set out by the Grand Bargain. This includes:

- ✓ Transparent and equitable remuneration for all partners
- ✓ Tranched payments to Global South / local or national research partners, including an upfront portion payment to cover initial costs
- ✓ Equal allocation of administration fees to Global North and Global South partners
- ✓ Allocated fees for translation of research tools and findings



- ✓ Allocated fees for dissemination of research findings, translation, communication activities and monitoring of uptake
- ✓ Comprehensive travel budget (if required), including insurance, visas, travel costs and salaries
- ✓ Currency exchange losses and bank fees for international transfers
- ✓ Budget for community or traditional obligations or customs.

## AWARDING RESEARCH CONTRACTS: ACTIONS TO PROMOTE EQUITABLE OPPORTUNITY



**What does success look like?** Research proposals are reviewed and scored by diverse panels with equal representation of Global North and Global South members. Contracts are awarded to research teams featuring both Global North and Global South partners. Mechanisms are in place to support unsuccessful partners to strengthen future submissions.



### Key action

Develop assessment criteria for proposals that include: joint production between research partners; appropriate and flexible specifications for years of experience and/or qualifications; how the proposal draws on Global South expertise; and how the research outcomes will be shared and distributed

Include Global South or local actors in decision-making about successful applicants, for example through a selection panel or steering committee

Give unsuccessful applicants feedback on how future proposals could be strengthened to promote more equitable knowledge production



### By whom?

Commissioning agencies

Commissioning agencies

Commissioning agencies







# Phase 2: Undertaking the research



In this phase, research processes are underway. Detailed methodologies and tools are designed, and data collection processes are planned and undertaken. This phase involves harnessing the strengths of each partner in project implementation, leveraging expertise and skillsets to collect and interrogate data, and turning it into research outputs.

The four action areas in this phase are:

-  Developing detailed methodologies
-  Collecting and analysing data
-  Developing and testing findings
-  Producing research product

## DEVELOPING DETAILED METHODOLOGIES: ACTIONS TO PROMOTE EQUITABLE RESEARCH DESIGN



**What does success look like?** Research methodologies are developed collectively, leveraging the skills and expertise of each partner. Designs are contextually appropriate, and local knowledge is drawn on appropriately.

 Key action	 By whom?
Co-design the research approach/methodology through dedicated collaborative workshops, ideas sessions and informal conversations. Ensure all partners feel comfortable and able to participate in these forums	All partners
Plan which partners will lead on which aspects of the research – designing and testing tools, translation, collecting data, testing and validating findings, analysing and writing the report – based on their interest and skills	All partners
Discuss which partners are best placed to engage with which stakeholders throughout the research. For example, Global South or local partners may be better placed to lead research engagement with other local and national research participants, depending on context dynamics	All partners, Global South partners
Design approaches that are relevant and appropriate to context and draw on Global South or local or national partners' knowledge about political, ethical and social aspects, including traditional research frameworks or methodologies	All partners
All partners agree on and undertake national ethics processes in the country where research is being undertaken	All partners




Build in time and resourcing for Global South or local researchers to test, adapt, contextualise and translate the research tools	All partners
Agree on mutual accountability processes throughout the research, such as a check-in schedule, and how to manage problems should they arise	All partners
Support the development of effective research governance and peer review processes that engage and represent Global South or local and national actors	Commissioning agency



### Box 5. Representative research governance

For large research projects, reflecting on equitable approaches to governance is important. This includes considering who is represented on bodies such as steering or peer review committees, and how representation is facilitated.

- ✓ **Steering Committee representation:** ensure that Steering Committees include a diverse mix of individuals, including Global South or local actors, and that meetings facilitate their contributions. Commissioning agencies can compensate Steering Committee members for their time and effort.
- ✓ **Peer review:** develop appropriate peer review processes which includes an agreement by research partners and commissioning agencies on who is selected for conducting peer review. Global South or local or national actors, and those with appropriate contextual knowledge and technical expertise, should be involved in peer review.

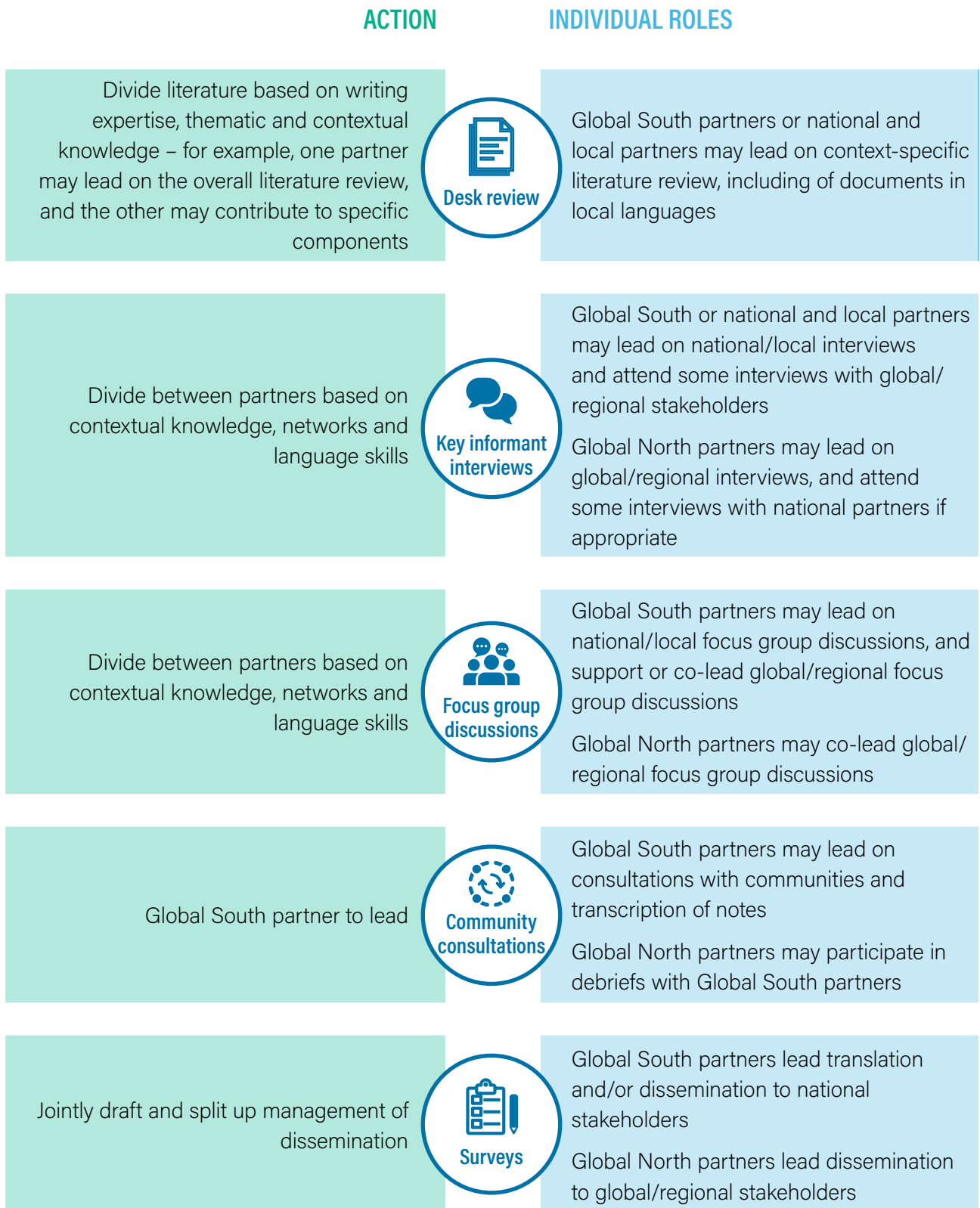
## COLLECTING AND ANALYSING DATA: ACTIONS TO PROMOTE EQUITABLE DATA GATHERING

 **What does success look like?** Data collection and information sharing take place in ways that leverage partners' complementary strengths and communication preferences.

 Key action	 By whom?
Look for ways partners can contribute to data collection. For example, Global South partners may join some interviews led by Global North agencies and vice versa to promote shared understanding of themes and trends	All partners
Share findings from the data collection process regularly and appropriately. Some partners may prefer verbal presentations in project meetings – this provides opportunities to ask questions and interrogate trends and themes	All partners
Give partners options for contributing to data generation, such as developing case studies, providing written or verbal overviews of key themes, crafting examples of evidence, undertaking a targeted document review	All partners

## Sharing the load



The following infographic provides some ideas for allocating data collection tasks when the Global South partner is based within the research country or regional context.



## DEVELOPING AND TESTING FINDINGS: ACTIONS TO PROMOTE EQUITABLE VALIDATION



**What does success look like?** Validation processes are meaningful, collaborative and findings are agreed by all research partners, and jointly shared with the commissioning agency.

 Key action	 By whom?
Develop diverse approaches to jointly analyse emerging trends and themes such as findings workshops, debriefing with Global South or local partners, and validation workshops. Allow time and opportunity for all partners to participate	All partners
Look for opportunities to validate findings with key participants involved in data collection, and consider which partner is best placed to lead them	All partners
Jointly hold an emerging findings workshop for the commissioning agency	All partners, commissioning agency
Ensure that all partners understand and agree on the main research findings before they are finalised. In the case of disagreement, address conflicting opinions respectfully and reach an appropriate solution	All partners



### Box 6. Sample validation workshop agenda

Before the workshop

- ✓ Check communication/platform preferences for each partner to optimise participation
- ✓ Ensure that timing allows for good representation from across the research team to optimise diversity and input
- ✓ Check whether translation/accessibility support is needed
- ✓ Request all partners undertake preparatory work to i) analyse their own dataset and think through the emerging themes and ii) articulate any barriers/gaps/questions

**Session 1: Setting the scene** – revisiting the research objectives and questions

**Session 2: Overview of findings (Partner X).** Allow time for questions and discussion

**Session 3: Overview of findings (Partner Y).** Allow time for questions and discussion

[Break]

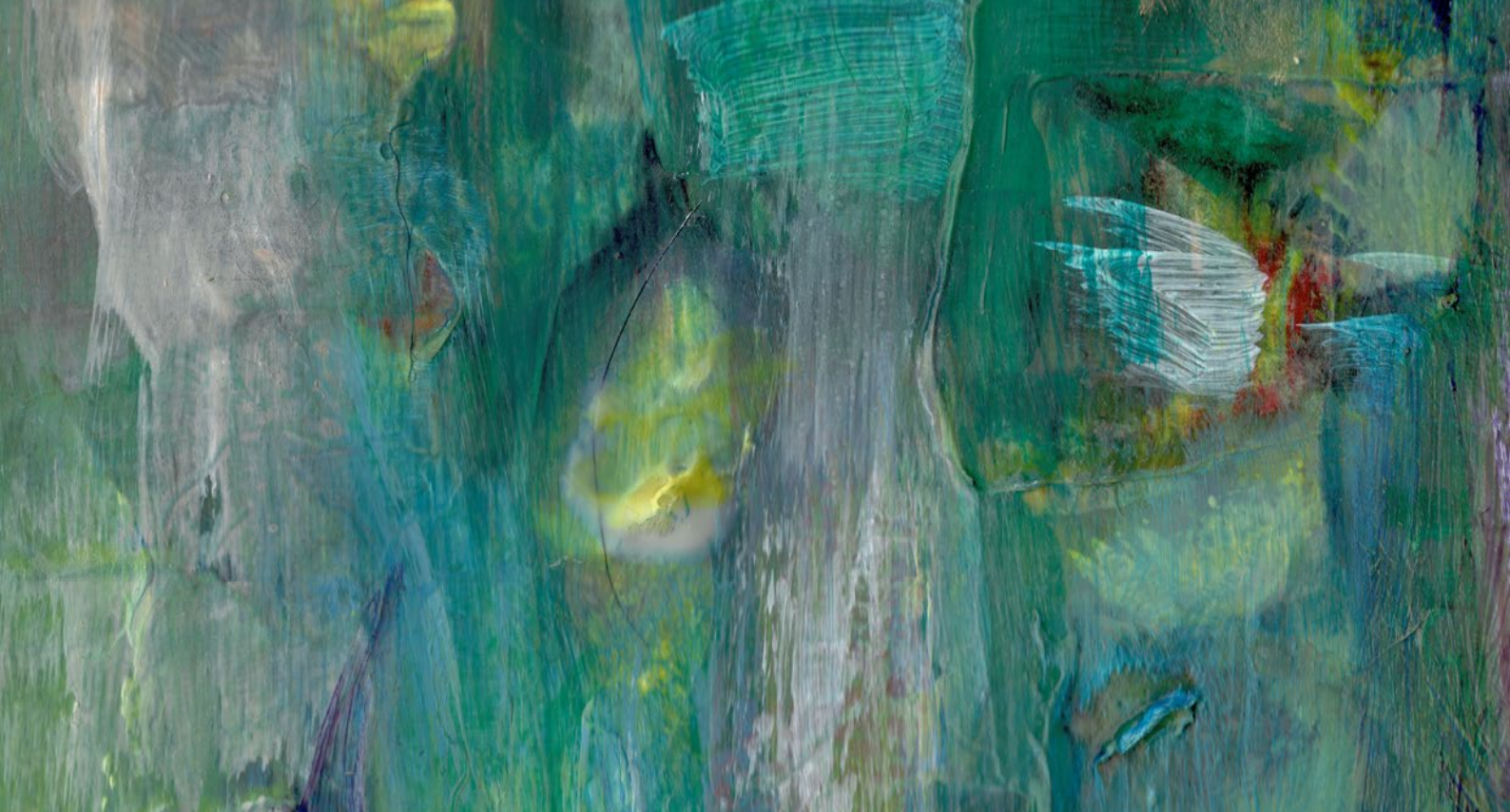
**Session 4: Analysis of findings,** guided by discussion of key questions:

- What are the common themes? What is the strongest evidence?
- Are there any gaps in data? What can be done to fill them?

**Session 5: Drafting recommendations,** guided by discussion of key questions:

- What are the implications for different stakeholders?
- Which groups should take what action?





## PRODUCING THE RESEARCH PRODUCT: ACTIONS TO PROMOTE EQUITABLE OUTPUTS



**What does success look like?** Production of research outputs leverages skills and inputs from across research partners. Branded outputs are tailored to context and reflect the contributions of all partners.

### Key action

Draw on Global South or local partner knowledge to understand how the product can be made most accessible to target groups/communities, and build this into the drafting process

Discuss how each partner will contribute to the writing phase, depending on partner priorities and skills

Utilise a variety of approaches to enable partners to contribute to the writing. This may involve generating specific case studies or sections, reviewing sections, leading on identification of trends or writing up examples

Hold findings and recommendations development sessions with all partners

Provide opportunities for all partners to review the draft/s to sense check, and ensure it accurately reflects the data and that all partners are comfortable with the findings

Ensure all partners are recognised in research teams, authorship and branding of the research product

Build in time and resources for partners/s to translate the product as needed

Identify the output type best suited to each context. For example, a translated executive summary document may have greater uptake than a full report

Recognise partners' specific contributions to the report or paper

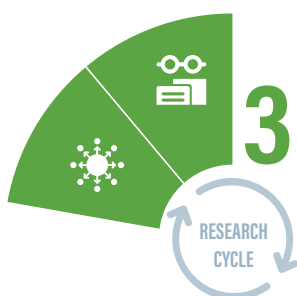
### By whom?

All partners

Commissioning agency





# Phase 3: Sharing the outcomes



This phase involves sharing the outcomes of the research with the relevant groups identified during research design (Phase 2). Although the production of the report can feel like the final step, to strengthen its influence and impact, all partners need a plan for how it will be socialised and disseminated in their networks. This is an opportunity to recognise all partners' contributions, and to strengthen the visibility and profile of Global South and local actors. Partners need to be appropriately compensated for time they spend in socialising research; commissioning agencies should factor this into budgeting. This phase should also include a review of the effectiveness of the partnership itself.

The two activity areas in this phase are:

-  Socialisation and dissemination
-  Review and reflection

## SOCIALISATION AND DISSEMINATION: ACTIONS TO PROMOTE EQUITABLE RESEARCH COMMUNICATION



**What does success look like?** All partners contribute to socialisation and are equitably resourced and recognised.

 Key action	 By whom?
Agree on a simple method for each partner to identify research uptake and use	All partners
Co-brand all research outputs and communications materials	All partners
Draw on local and national researcher partner connections and knowledge to ensure research outcomes are shared in a variety of ways with other local actors and communities	All partners
Equally acknowledge research partners in all communications events and materials	All partners
Create opportunities for Global South partners to present research and engage in Global North dominated forums	Global North partners, Commissioning agency
Compensate all partners appropriately for their role in dissemination	Commissioning agency
Hold joint briefings on the research with key national, regional and global humanitarian actors	All partners, commissioning agency
Raise the visibility and profile of the Global South or local or national actors in research communications activities	Global North partners, commissioning agency
Translate and communicate communications materials in a variety of formats, mediums and languages for different audiences and abilities	All partners







## REVIEWING THE PARTNERSHIP: ACTIONS TO PROMOTE EQUITABLE REFLECTION



**What does success look like?** Reflection promotes learning and strengthening of equitable research partnerships.

 Key action	 By whom?
At the conclusion of the research, debrief and critically reflect on it as a research team. Document and share outcomes and agreed actions	All partners
Look for ways to socialise what has been learned through the partnership so that others can benefit (e.g. through reflective pieces such as blogs)	All partners
Schedule a debrief session with all research partners to foster learning and continuous improvement in equitable research. Look for opportunities to share learning with other commissioning agencies	Commissioning agency
Pursue longstanding research partnerships between Global North and Global South organisations	All partners
Develop agreed advocacy key messages for different groups of targeted audience and agree on how these will be shared to leverage partner networks and relationships	All partners



### Box 7. Five key reflection questions to guide partnership processes










1. How well did the research partnership brokering process operate? What can be learned from the experience of each partner in setting up the research partnership?
2. Were principles or ways of working established and upheld during the research? If not, why not? What could ensure a more principled approach to working together in future?
3. Did the research leverage the right skill mix of each partner? If not, how could the process be improved in future?
4. Did the research reveal skill gaps? If so, are there ways to work together or broker support so that these shortages can be overcome?
5. How can mutual learning from your partnership experience be used to support better practice across other agencies, including the commissioning agency?



# Summary

Equitable partnerships are critical in all stages of the research cycle (Figure 2). More equitable partnerships and research practices will help the humanitarian sector to progress towards a more localised system. Whilst this guidance note focuses on more equitable processes across the stages of research, it is vital for all stakeholders to reflect on how partnerships can transcend projects and move towards sustained, long-term relationships.

**Figure 2. Equitable research partnerships – a vision of success**

PHASE 1: Defining the problem and setting the agenda	
Activity	What Does Success Look Like?
 Identifying The Need for Research	Calls for proposals are accessible for a diversity of actors, written in plain language and elicit proposals from a diversity of Global North and South actors working in partnership.
 Developing Research Proposals	Research proposals and budgets are developed in partnership, leverage each partners' skills and capabilities, and are underpinned by key principles and ways of working.
 Awarding Research Contracts	Research proposals are reviewed and scored by diverse panels with equal representation of Global North and Global South members. Contracts are awarded to research teams featuring both Global North and Global South partners. Mechanisms are in place to support unsuccessful partners to strengthen future submissions.
PHASE 2: Undertaking the research	
Activity	What Does Success Look Like?
 Developing Detailed Methodologies:	Research methodologies are developed collectively, leveraging the skills and expertise of each partner. Designs are contextually appropriate, and local knowledge is drawn on appropriately.
 Collecting And Analysing Data	Data collection and information sharing take place in ways that leverage partners' complementary strengths and communication preferences.
 Developing and Testing Findings	Validation processes are meaningful, collaborative and findings are agreed by all research partners, and jointly shared with the commissioning agency.
 Producing the Research Product	Production of research outputs leverages skills and inputs from across research partners. Branded outputs are tailored to context and reflect the contributions of all partners.
PHASE 3: Sharing the outcomes	
Activity	What Does Success Look Like?
 Socialisation and Dissemination	All partners contribute to socialisation and are equitably resourced and recognised.
 Reviewing The Partnership	Reflection promotes learning and strengthening of equitable research partnerships.

# Endnotes

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