Voices of Southern researchers

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Good afternoon and thank you for this opportunity to speak at this conference. It's been an interesting day so far. It's also been interesting to see how the plans for today evolved from the early summer when we chose a general theme of 'Voices from the Global South' to the very strong open access theme we now see running through the whole day.

This is good timing as yesterday was the publication date of a journal paper from my colleague Andy Nobes and me about experiences and attitudes to open access from low and middle income countries. I'll be drawing on those findings in this presentation – and also on some more recent observations that have emerged since we did that survey – and I should note that obviously I am British but the things I was presenting were not my perspectives but things people had told us.

But first I'm going to step back and take a look at the wider context and why it matters to involve all research voices and perspectives in the direction of research and how research is communicated.

It is notable that the countries, regions and people groups often most affected by the challenges of climate change, gaps in health care and lack of education, for example, are often the same countries, regions and people who are under represented in the global research community.

There has been encouraging progress in diversifying scholarly communication over recent years. However, there is plenty still to be done to make sure all voices are involved in research and in communicating research. Research equity is essential for ensuring that research is done where it is needed, about the key challenges that need to be tackled, and that all researchers have an opportunity to contribute to tackling local problems.

OUR VISION
Research and knowledge at the heart of **development**

OUR MISSION
To **support** individuals and institutions to **produce**, **share** and **use** research and knowledge, to **transform lives**

OUR CORE PILLARS
Capacity development | Convening Influencing | Partnerships | Learning

This is where INASP comes in. We believe that evidence and knowledge are central to solving development challenges and so INASP works to strengthen Southern research and knowledge systems.

What we do

We work across the research and knowledge system, with a focus on the following areas:

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Our work can be thought of in six broad themes across the research and knowledge system …

One of the many exciting things that we are involved in at INASP is our AuthorAID project. Since it began back in 2007 AuthorAID has had a focus on supporting particularly early-career researchers in low- and middle-income countries in communicating their research. This work includes an online system matching mentors and mentees, discussion forums, online journal clubs and massive open online courses in research writing held several times a year.

Our most recent MOOC has just finished and, as we have done for the past few years, we invited participants – as a completely optional activity – to share photos of their research setting and a little bit of their story. We had some wonderful entries and, hot off the press, I thought I'd share a few with you.

Pedzisayi Joy Makumbe_Operating From The Trenches 3

Operating from the trenches

But my war is a different kind of war.

I take out the "water scarcity" enemy. I take out the "poor sanitation" enemy.

Civil Engineering is more than a career, It is a way of life. Ensuring the water pipes are laid as per design and quality, gives the people in the Western Region of Uganda hope and something to smile about. Clean water right at their doorstep.

Any research on more sustainable methods and materials for construction to ensure clean water and sanitation methods which are affordable in vulnerable communities, is indeed my passion.

SDG 6

together we can!

Rawa Ali Hamad Badri
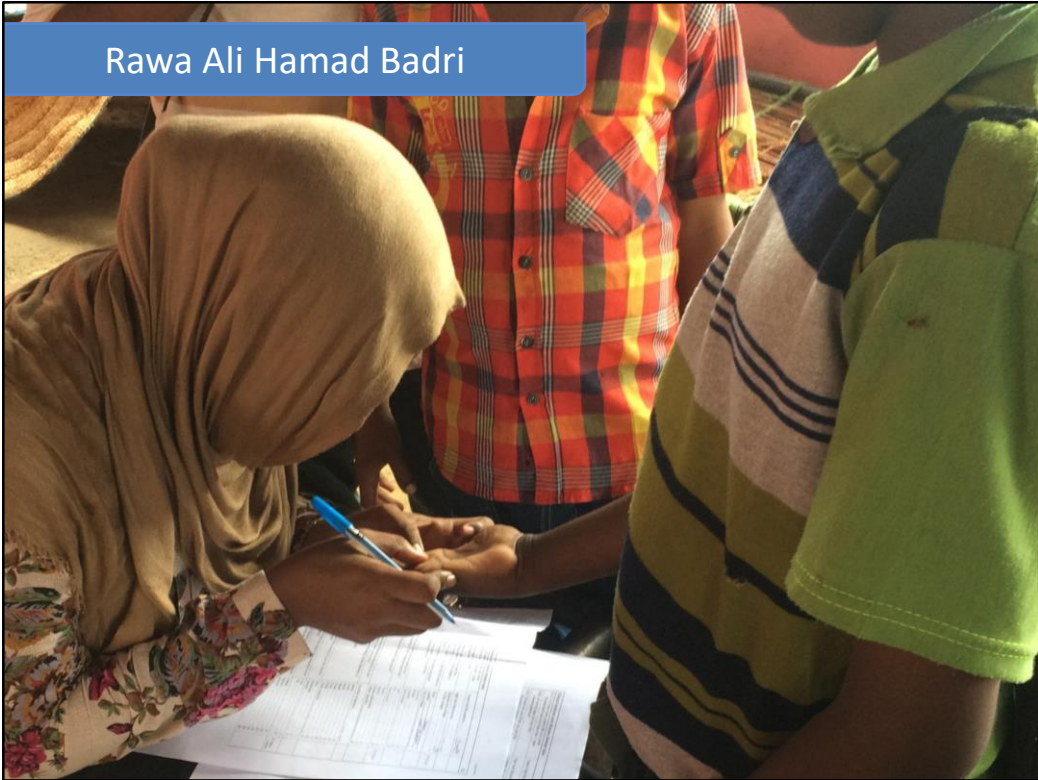
Healthcare is also a critical concern in every country and local knowledge and engagement is vital for ensuring the right questions are asked and the right priorities are addressed. This is Rawa Ali Hamad Badri from Sudan, who says:

A photo of me collecting data during Mycetoma house to house survey in Sinnar state (a highly endemic state in Sudan) in 2018. I'm the girl who's wearing a scarf and assessing a hand swelling in a child. We were a team of 10 doctors and 6 medical assistants and we assessed all cases using interview questionnaires and Computer Assisted Personal Interviewing (CAPI) Software. During this survey we covered about 21 villages in the eastern part of Sinnar state with an average of 450 families in each of them. Mycetoma is one of the neglected tropical diseases (NTDs) and the aim of the survey is to map the distribution of Mycetoma in Sudan and to offer free medical support for the old diagnosed and the newly discovered cases to help in eradicating the disease.

Judith Okolo

This third photo is from Judith Okolo at an annual March for Science in Nigeria. I like it partly because I've also participated in a March for Science and similarly posed with my placard.

I've chosen this picture to show you here as I think it feeds into the potential of research and of being able to access and communicate research – the vision of Open Access.

So, as I said at the start of this presentation, yesterday we had a paper published based on research into Open Access awareness, attitudes and experiences within the AuthorAID network. This was my first journal paper that wasn't about inorganic chemistry and my first paper since 2002. Things have changed a bit!

This research was not initially conducted with a paper in mind but as part of INASP's ongoing work to understand better the access needs, priorities and challenges of researchers in the South – and to inform our own work. But we realised that this was somewhat of a knowledge gap in terms of large-scale author studies that aren't dominated by the Northern hemisphere.

507 respondents from 73 countries
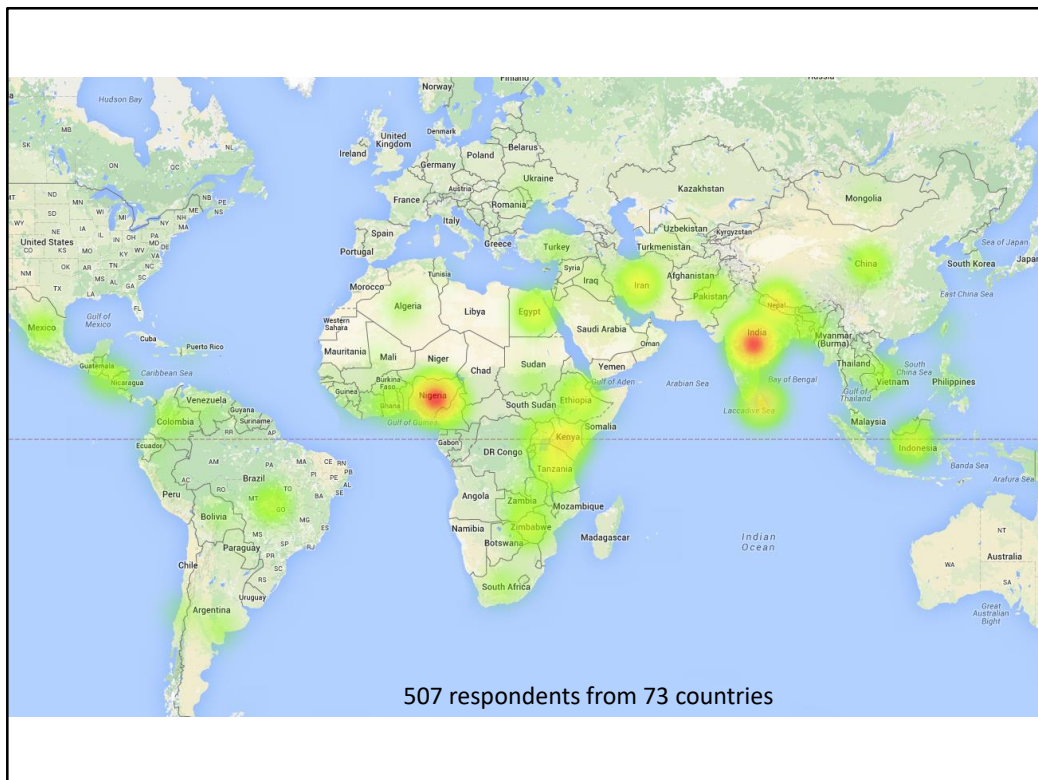
As you can see on this map, respondents were from across Central and South America, sub Saharan Africa and south Asia, with particular hotspots for India and Nigeria. I won't go into more detail about the demographics here but you can read about them in the paper or indeed in the raw dataset.

“Open access journal articles can be easily disseminated to the audience, and users get up-to-date research output.” (Bangladesh)
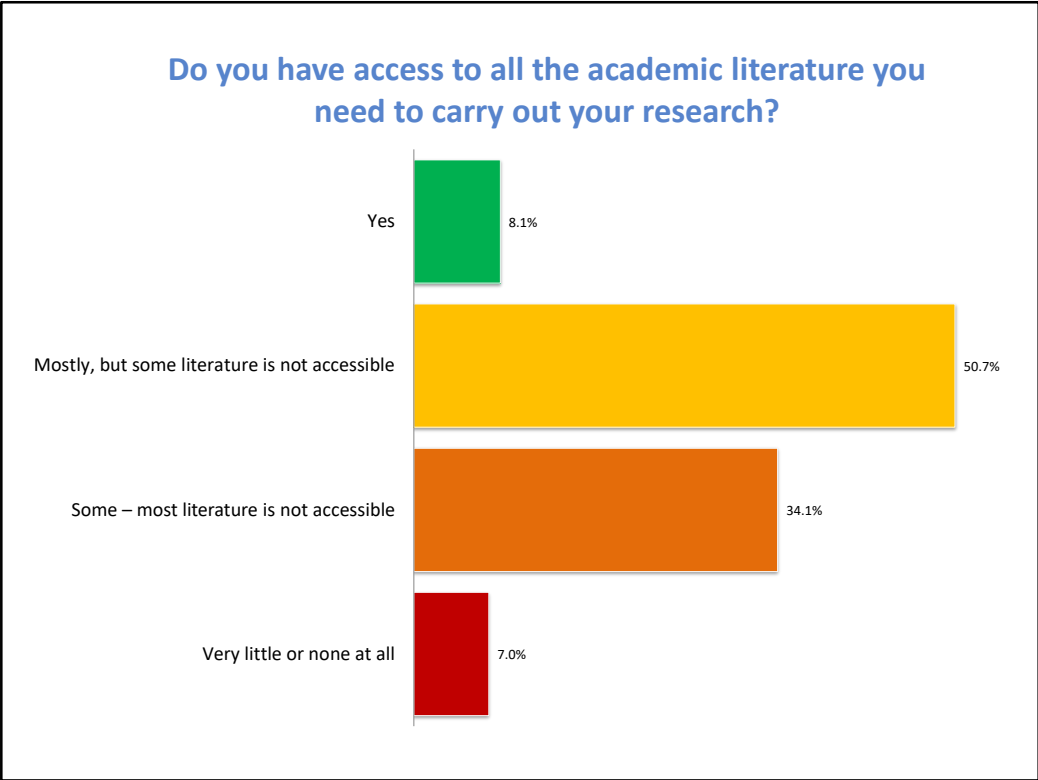
“It's a very good source for intellectual [sic] for scholars in poor countries where research is poorly funded.” (Nigeria)

“It depends on who is the publisher of the Open Access journal …if a journal is published by a predatory publisher, I would say the quality and other factors would be very poor or poor.” (Bangladesh)

“There are so many Open Access journals which are not credible and do publish papers without even reviewing them. No comments are provided to improve the submitted papers.” (Tanzania)”

We wanted to understand experiences of OA for researchers both as readers and as authors. We asked 24 questions, which was quite ambitious but we were encouraged by how many of the respondents stuck with the survey 'til the end. I'm not going to go through every question you'll be relieved to know but pick out some broad themes. We are also aware that there is a wealth of other potential insight from the responses that could be explored – looking at responses by geographical region, age or discipline, for example. The dataset is openly available if anyone wants to look at it with other lenses.
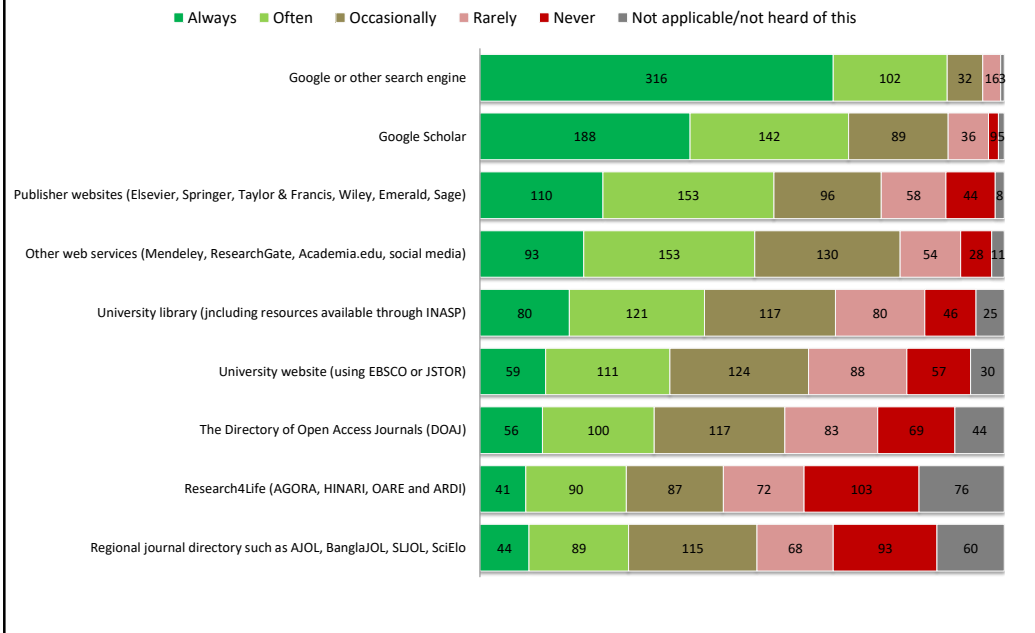
The first theme, which we have also picked up in conversations before and since is that there is a lot of positivity about OA … both about having access to research from all over the world and about being able to share their research with others more easily.

Do you have access to all the academic literature you need to carry out your research?

- Yes — 8.1%
- Mostly, but some literature is not accessible — 50.7%
- Some – most literature is not accessible — 34.1%
- Very little or none at all — 7.0%

One of the interesting things is that there is still a very mixed picture about how much access researchers have. A small portion said they had all the access they needed and a similarly small portion said they had no access but the vast majority fell into the categories in between. I also note that I got an almost identical shaped graph last month when I asked this question as a twitter poll during Open Access Week.

So there are still access gaps but to get a fuller picture we think it's also good to look at visibility and discoverability.

I must apologise that I've done the unforgivable presentation thing of a slide with loads of information on it that is unreadable to the audience. But I wanted to show you this slide for the broad themes. The question was: How often do you use these sources when you are searching for research literature? And the key thing to note is that the green bars on the left here are 'always' and the grey bars on the right are 'never' – and also that the size of the 'never' bar is small for every option.

And the next important thing to note is that the top choice was Google or another search engine and the second was Google Scholar. Google is, of course, powerful but it also has limitations and potential biases, albeit different potential biases from those of Northern commercial publisher tools.
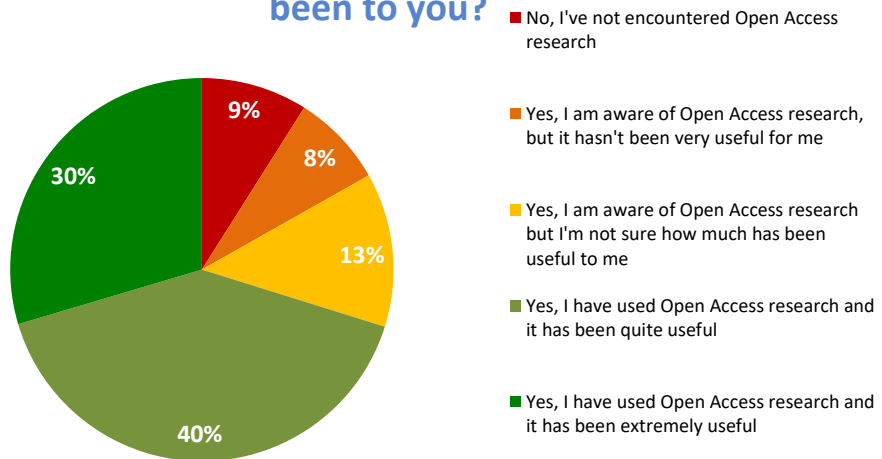
Publisher websites came third and the university library and university website came around the middle – pointing to the same situation that I've been hearing about for the past 15 years that libraries face challenges in showing their role in information access. It may point to researchers potentially having more access than they are aware that they have, an issue echoed in the fact that Southern access initiatives came towards the bottom – although it should be noted that there were many respondents from India and Nigeria who would not typically qualify for access schemes. It was also disappointing to see that local journal platforms came at the bottom of the list. Since the time of this survey we have been working to increase visibility and particularly perceived credibility of Southern journal platforms so would hope that this is slowly shifting.

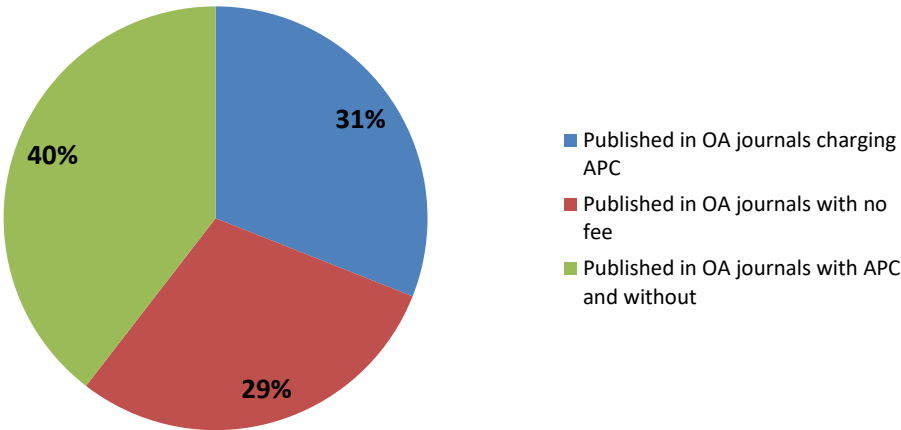We also touched in the survey on use of institutional repositories, which I won't go

into here but recent conversations on this topic have revealed strong support for the role of institutional repositories in Southern access.

Have you encountered and read Open Access journals or articles in your own literature searches and research? How useful have they been to you?

- No, I've not encountered Open Access research
- Yes, I am aware of Open Access research, but it hasn't been very useful for me
- Yes, I am aware of Open Access research but I'm not sure how much has been useful to me
- Yes, I have used Open Access research and it has been quite useful
- Yes, I have used Open Access research and it has been extremely useful
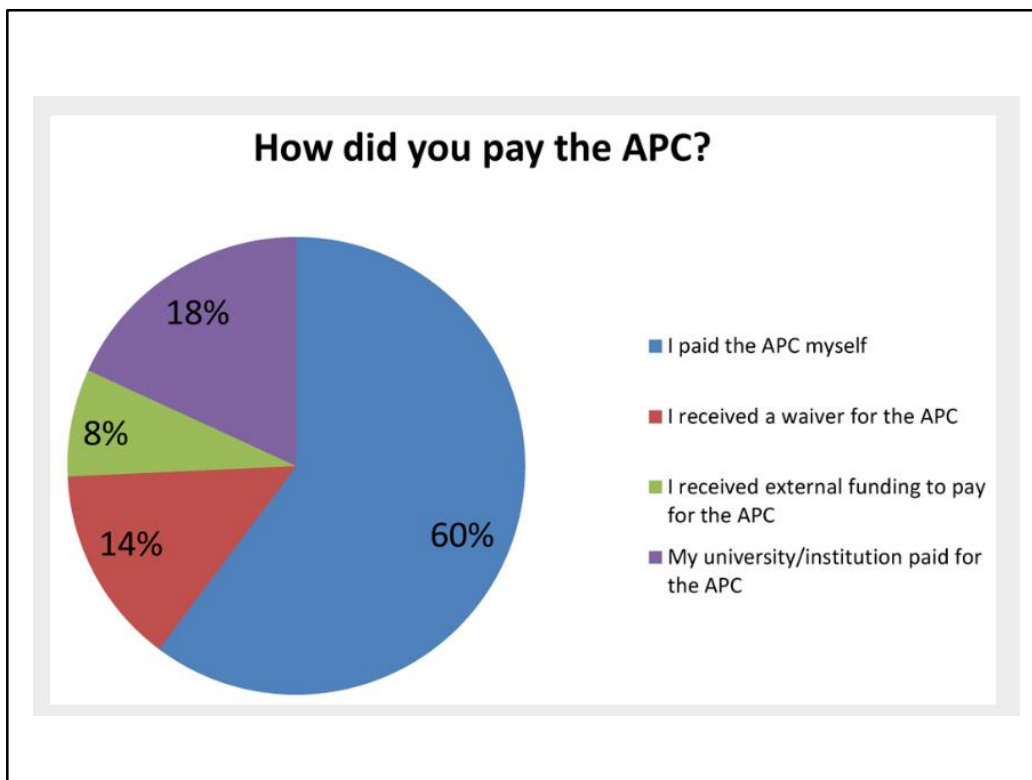
9%
8%
13%
30%
40%

Reassuringly for Open Access champions, the vast majority of respondents had used OA journals in their research and most have very it quite or very useful.

If you have published an article in an Open Access journal, were you charged an Article Processing Charge (APC)?

31%

40%

29%

- Published in OA journals charging APC
- Published in OA journals with no fee
- Published in OA journals with APC and without

Turning to researchers as authors, we also found that a lot of researchers have published in OA journals and we asked them if these journals had charged an APC. It turned out to be quite balanced between journals that do and don't charge APCs. What we didn't ask but it would be good to ask in a future study was how much were the APCs. We know that APCs of Southern journals, if they have them, tend to be much lower than those of Northern commercial journals.

How did you pay the APC?

- I paid the APC myself
- I received a waiver for the APC
- I received external funding to pay for the APC
- My university/institution paid for the APC

60% · 18% · 8% · 14%

Perhaps the most surprising – and one of the findings that I've seen shared on Twitter since we published a preprint of our paper – is that 60% of respondents said they had paid the APCs themselves. There is a range of potential reasons for that … informal conversations since have revealed
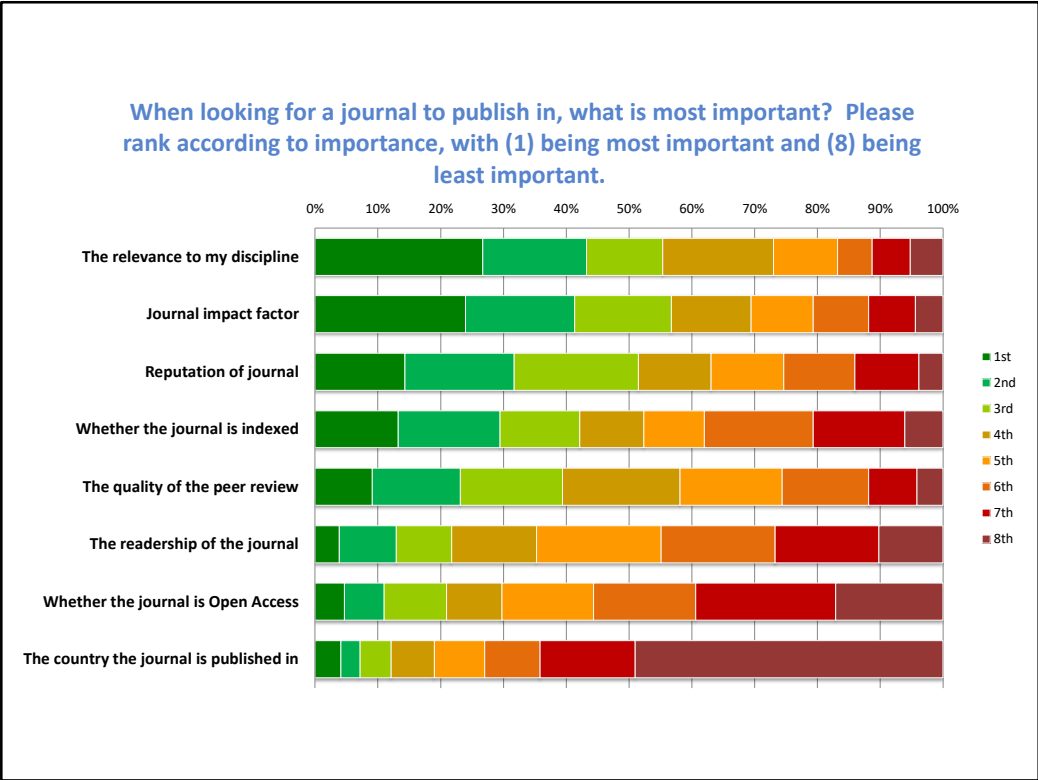
> Hassle and bureaucracy
>
> Eligibility – we had lots of respondents from India and Nigeria; it may be harder to get someone else to pay if you are not being at recognized research institution
>
> Not being aware of waivers
>
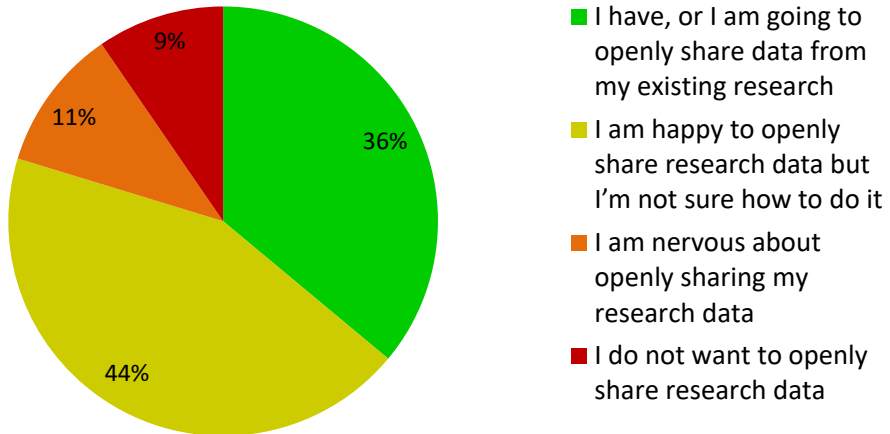> Being uncomfortable with the idea of asking for waivers
>
> Choosing journals with low APCs (we didn't ask how much they had paid)

When looking for a journal to publish in, what is most important? Please rank according to importance, with (1) being most important and (8) being least important.

In terms of motivations for OA our findings echo what others have been saying here, that OA is actually quite low down the list of priorities, compared with relevance, impact and reputation.

Data sharing

- I have, or I am going to openly share data from my existing research
- I am happy to openly share research data but I'm not sure how to do it
- I am nervous about openly sharing my research data
- I do not want to openly share research data

36%
44%
11%
9%

I'm also going to briefly touch on data sharing. We found that respondents were surprisingly positive but would like more help to do it.

Data sharing - pros

"Happy to share because it is an opportunity to be known by international scientific communities; opportunity to integrate or to built a network in your research field. Go ahead sharing!!!"

"…sharing research data contributes to open thinking and building of an opened and integrated world."

"This what research is about. Sharing data with peers in order to solve the existing problems. Solving scientific problem should be the ultimate goal of science."

"Why sell knowledge? We are given it for free, give it for free....Bible (Matthew 10:8)"

Here are some positive comments that were made. But there were some concerns raised too.

Data sharing - cons

"I am concerned about someone getting my research data and using it to write another publication, most especially in my country where we do not have an established platform for issues like this."

"If I share my raw data, someone may publish it before I am through with my publication. It also happens with an ideas. Someone may implement your idea before you begin working on it especially if the person is better equipped than you"
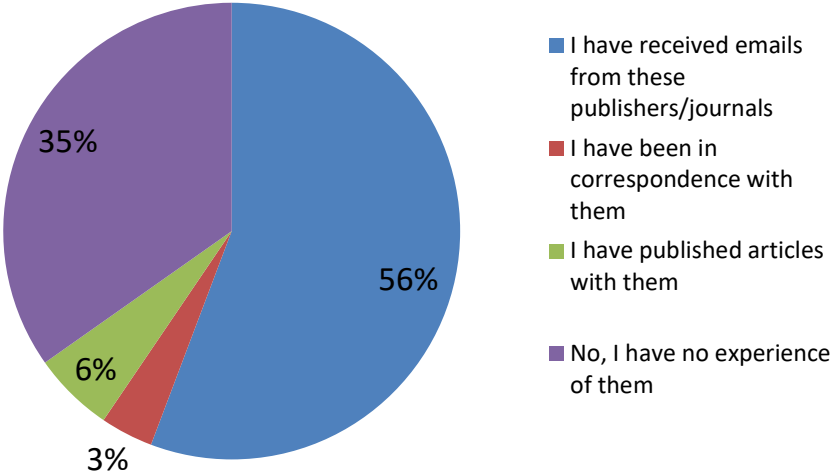
"It would be okay if it is to a journal for publication purposes, otherwise why should I share data with people I don't collaborate with?"

"Basically, it takes a few years to fully work on a particular data. Sharing research data will open the work to others to work on - which sorts of cut me off from the opportunity."

"If someone wins a Nobel prize from my data, what will happen?"

Concerns about sharing data too, summed up nicely in this last comment I think. "If someone wins a Nobel prize from my data, what will happen?"

Have you had experiences of encountering so-called 'predatory' publishers/journals?

- I have received emails from these publishers/journals
- I have been in correspondence with them
- I have published articles with them
- No, I have no experience of them

(56%, 3%, 6%, 35%)

Sadly it is hard to talk about Open Access and experiences of Southern researchers without mentioning what we in Think. Check. Submit. like to call journals that are not trustworthy. Clearly many Southern researchers are approached a lot by dubious journals and some have entered dialogues with them. 6% said they have published in them, a figure that we suspect is an underestimate but we find that often researchers with less networks of support are unaware of concerns about the journals they have selected – until it is flagged up when they apply for promotion or apply to be an AuthorAID mentor for example. Just to make clear; in this study we did not ask them whether this was deliberate or accidental. We might assume, as the respondents were identifiable at least to us (although anonymised on the dataset that we have shared), that these were accidental.

So, to summarise:

LMIC researchers:

Are likely to have paid an APC, often from their own pockets

Tend to see OA journals as decent quality and useful for discovery

But value reputation and impact factor over their research being open access

Are mostly positive about data sharing but need support in doing so, and want assurance about acknowledgment and misuse of the data

Often receive emails from predatory publishers

This survey was done some time ago but our ongoing conversations with researchers indicate that the issues remain very current. As discussions about Plan S, transformative agreements etc, the many discussions we've heard today, continue it is notable that Southern voices are often underrepresented. It's an issue we at INASP follow closely and I'd urge everyone involved in these discussions to remember the huge body of researchers in the South for whom these issues are crucial – and, although I've only touched on it in this talk, a huge body of Southern journals that are part of this global ecosystem and a diverse range of other stakeholders – policymakers, local NGOs, citizen groups for example who also have perspectives to bring to these discussions.

Please do chat to us if you'd be interested in exploring these ideas together.

Thank you for listening
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