

Enhancing Global South Scholarly Publishing

Researcher2Reader Conference and Workshop

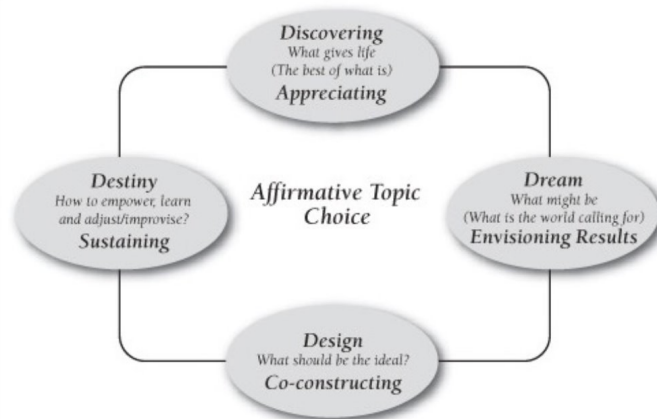
Workshop Presenters: Blessing Mawire, Research4Life Country Connectors Program Lead and Sarah Phibbs, Director Equity & Inclusion, STM

Background

A key challenge that faces editors and journal publishers in lower- and middle-income countries (LMICs) is the lack of access to training and resources that support academic publishing. The workshop explored how the UN Publisher Partnership Research4Life, in collaboration with Researcher to Reader delegates, could address disparities in scholarly publishing through targeted publishing skills-building initiatives. Participants considered strategies for developing publishing courses and mentorship programs aimed at editors and journals, with the goal of raising the quality of local publications, increasing visibility in the global research landscape, and building a sustainable publishing infrastructure in regions that needed it most.

Research4Life is delivering a tailored approach to research cycle and information skills-building in global south institutions across 124 LMICs. R4L’s strategy envisions increased participation of researchers as both consumers and producers of research through training, regional journal support, and researcher skills development. The Research4life Country Connector network is identifying local journals, running certificated training programs in English, Spanish, and Ukrainian in collaboration with the Directory of Open Access Journals (DOAJ). To date, 100 journals have been identified in need of support.

The workshop guided participants through an Appreciative Inquiry approach, focusing on the 4D cycle (Discover, Dream, Design, and Deliver) to develop strategies that foster collaboration and built publishing skills in low- and middle-income countries (LMICs). Using Research4Life as a key resource, the sessions emphasized strengths, successes, and future possibilities for advancing the role of LMIC editors and journals in global scholarly publishing.



Appreciative Inquiry 4 D cycle (Cooperrider and Whitney, 2005, Figure 4, Chapter 3, no pagination)

The workshop facilitated rich discussions around several central themes critical to enhancing scholarly publishing in LMICs. Key topics included mentoring and peer support, open access publishing, funding, special issues, indexing challenges, and the necessary infrastructure to improve the academic publishing landscape. From these discussions, two key actionable areas emerged, *Mentoring and Peer Support*, and *Infrastructure and Standards*, which will guide future initiatives aimed at empowering researchers and editors in these regions.

Mentoring and Peer Support

Peer-to-Peer Mentoring:

A significant emphasis of the workshop was on developing peer-to-peer mentoring networks that foster both international and local mentorship building on successful projects like the African Journal Partnership Program. Participants articulated the need for mentorship systems that pair emerging publishers and editors with experienced professionals, including those from higher-income countries as well as seasoned individuals from the same region. This dual approach aims to empower scholars through guidance and resources tailored to their specific needs.

Structure of Mentoring:

Face-to-face mentoring was acknowledged as the most effective method, though funding limitations were noted as a barrier, especially following significant cuts to development budgets in some regions. To address these challenges, participants discussed the potential of utilizing virtual mentoring software and mixed models that combine short courses with ongoing support. Partnership with existing professional organizations such as EASE (European Association of Science Editors) and CSE (Council of Science Editors) offer an opportunity to kick start mentoring initiatives. Additionally, mentoring programs like those provided by STM and ALPSP for publishing staff were recognized as good models to build on for editors and publishers in LMICs.

Infrastructure and Standards

Quality Journal Standards

A core outcome of the workshop was the need for robust standards that help journals from LMICs compete effectively in the global scholarly publishing landscape including the development of tools, websites and checklists. The INASP and AJOL (African Journals Online) star ranking system was flagged as a good model for improving standards. Additional sources include COPE, ENAF (European Network of Academic Foundations), and AJOL. Participants noted that journals often lack brand name recognition, which can hinder their credibility. Establishing quality standards provides assurance to readers and enhances the overall integrity of local publications. Participants explored examples of accreditation processes tailored for organizations in LMICs and discussed the potential role of Artificial Intelligence (AI) in checking and verifying adherence to established standards.

Development of Robust Editorial Policies

A critical discussion point was the necessity of robust editorial policies that are inclusive and developed collaboratively, rather than dictated by standards set in the Global North. Participants agreed that policy development should actively involve institutions in LMICs, ensuring that local context and needs are considered. This collaborative approach would result in more relevant and applicable standards that uphold the integrity of scholarly publishing and reflect the unique challenges and contexts faced.

Indexing and Visibility Challenges

Participants engaged in discussions regarding the importance of indexing and standardization, identifying frameworks such as COPE (Committee on Publication Ethics) and ICMJE (International Committee of Medical Journal Editors) as references for best practice. Significant challenges were discussed relating to indexing practices, impact factors and reputation development. Addressing these challenges offers a crucial step toward improved visibility and reach of global south publications.

Infrastructure Improvement

There was an acknowledgment of the need for enhanced infrastructure in global South countries and LMICs to support scholarly publishing. The technical requirements necessary for meeting indexing suitability were also highlighted as critical to this improvement. Looking towards the future, discussions included the need for improved methods of sharing metadata and linking literature to enhance discovery and better access to research outputs. Improved infrastructure includes availability of software and tools to run a publishing operation including platform development such as PKP, archiving through third parties such as CLOCKSS and Portico and use of Persistent Identifiers (PIDs) through ORCID and Crossref.

Other Highlights of the Discover, Dream and Design Stages

1. Open Access Publishing Models

Community-Funded Models

The workshop emphasized the importance of community-funded publishing models, such as "direct to open" and "subscribe to open." These models are particularly significant for early career researchers in LMICs as they facilitate access to research outputs without the barrier of publication fees. Funding and sponsorship were highlighted as critical components for ensuring the sustainability of these models.

2. Platforms and Initiatives

- *African Journals Online*

This successful initiative brings together journals from various African countries and includes rankings designed to enhance the visibility of these publications.

- *Public Knowledge Project (PKP)*

PKP was highlighted for their focus on providing training and support for editors and researchers, aiming to enhance overall publication and publishing quality.

- *SciELO.org*

Originating in Brazil, SciELO supports journals in Latin American countries and collaborates with platforms like PKP on preprint servers.

3. Conferences and Peer Support

The role of regional societies or chapters operating under larger organizations was emphasized, as they often provide mentorship and workshops for researchers. Conferences were recognized as valuable for helping researchers secure funding and gain mentorship opportunities. However, the cost of attending such events was noted as a barrier that limits access for many.

4. Publishing Impact and Financial Models

Impact Factors and Metrics

Conversations centered on the need to decouple research assessment from traditional metrics, which often do not reflect the true impact of scholarly work.

5. Funding and Financing

Challenges regarding the financial sustainability of publishing were discussed, particularly in relation to Article Processing Charges (APCs). Participants stressed the need for transparency in publishing finances to better support researchers.

6. Language and Accessibility

The predominance of English as the global language of publishing raised concerns about accessibility. Suggestions were made for utilizing AI to assist with language versioning, making research outputs more accessible to a wider audience.

7. Global Acceptance

The necessity for global acceptance of quality journal standards was emphasized, with consensus that standards should not be limited to specific regions or countries. This global approach would ensure that journals from the Global South could compete on an equal footing with their counterparts, regardless of geographical boundaries.

Challenges and Solutions

The discussions illuminated various challenges faced by journal publishers in the Global South, particularly concerning infrastructure needs. A program-based approach rather than a project-based one was deemed essential to ensure sustainable development and support.

Understanding editorial communities by discipline and region was highlighted as a critical factor in addressing these challenges, with the role of societies in bridging connections between the Global North and South being particularly emphasized. The use of conferences and mentorship programs emerged as a means to facilitate this connection.

Lastly, participants reaffirmed that long-term commitments at a program level was necessary to effectively nurture the quality and impact of LMIC scholarly publishing.

Key Takeaways, Next Steps, and Action Areas

The workshop highlighted the crucial need for structured support mechanisms for authors, researchers, and editors in LMICs. Two primary action areas emerged as focal points for advancing scholarly publishing: the development of a global quality journal standards toolkit and the establishment of a mentoring and peer support program for editors.

Next Steps

1. Global Quality Journal Standards Toolkit

- a) Landscape Review: Conduct a comprehensive review of existing resources, such as the INASP Handbook for Journal Editors, to identify best practices and tools currently available.
- b) Partnership Involvement: Engage partners, including STM, COPE, and NISO, to contribute expertise and resources to the toolkit development.
- c) Implement Editor Feedback: Gather and incorporate feedback from editors to ensure the toolkit meets their needs and expectations effectively.
- d) Create the Toolkit: Develop a practical, user-friendly toolkit that encompasses guidelines, resources, and standards for quality in journal publishing.
- e) Conduct Workshops: Organize training workshops to introduce the toolkit and guide participants on utilizing its resources effectively.
- f) Consider Sustainability: Assess long-term sustainability strategies to maintain and update the toolkit and associated resources.

2. Editor Mentoring & Peer Support Program

- a) Editor Survey: Research4Life (R4L) will undertake a survey to gather insights about publisher and editor experiences, needs, and challenges in LMICs.
- b) Establish Governance/Leadership: Set up a governance structure involving editorial leaders from organizations like STM, AU Presses and various publishing houses to oversee the mentorship program.
- c) Proposal for Sponsorship and Funding: Develop a proposal outlining the program's goals, needs, and potential funding opportunities to secure financial support for mentorship initiatives.
- d) Identify Pilot Countries: Focus on leveraging the R4L Country Connectors network to identify suitable countries for launching a pilot mentoring program, ensuring targeted and effective implementation. Potential to extend to four LMIC University Presses through the AU Presses task force.

Conclusion

The workshop discussions underscored the need for actionable strategies to bolster the quality and visibility of LMIC scholarly publishing. By focusing on the development of a global quality journal standards toolkit and a robust editor mentoring and peer support program, stakeholders hope to create a sustainable infrastructure that empowers publishers and editors alike.

The next steps are designed to foster collaboration among key partners, leveraging their expertise and resources to provide support for publishers, Editors and their journals to thrive in the global research ecosystem. Though the workshop was based on feedback from the journals identified through Research4Life about what was needed, it is vital the shape of the project is defined by critical leaders of LMIC publications.

Our success depends on the collective energy harnessed during the session, and we invite our workshop participants to commit to supporting our work through Research4Life.

Do get in touch with either Sarah at sarah@stm-assoc.org or Blessing at mawireb@who.int and we will include you in our project team.

Annex 1: Workshop Participants

Name	Surname	Position	Institution/Organization
Paul	Ayris	Pro-Vice-Provost	UCL
David	Beales	University Librarian	Brunel University of London
Peter	Berkery	Executive Director	Association of University Presses
Damian	Bird	Publishing Director	CABI
Tom	Drake	Associate	INASP
Esther	Fagelson	Open Access Manager	Bloomsbury Publishing
Lindsay	Flook	Journal Development Manager	Applied Microbiology International
Adam	Gardner	Managing Director	Hobart Books
Melissa	Harrison	Team Leader, Literature Services	EMBL-EBI
Kira	Hopkins	Scholarly Publishing Outreach Officer	Copim Open Book Futures / Birkbeck University
Haseeb	Irfanullah	Independent Consultant	
Jessica	Jackson	Marketing & Communications Manager	Oxford University Press
Anna	Korzeniowska	Research Culture Manager	eLife
Jessica	Monaghan	Director, Policy & Projects, OA	Springer Nature
Alison	Norwood	Publishing Manager	Institute of Development Studies
Dominic	Tate	Associate Dir., Library Research Support	University of Edinburgh
Amanda	Whiting	Membership and Training Manager	ALPSP
Stephen	Wilkes	Product Manager	Royal Society of Chemistry
John	Willinsky	Professor	Public Knowledge Project & Stanford University