



Knowledge Translation in the Global South: Bridging Different Ways of Knowing for Equitable Development

James Georgalakis and Fajri Siregar

July 2023

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Summary

This study explores knowledge translation (KT) in the global South and provides recommendations for funders to support more effective structures and strategies for the use of research for equitable development. The project explores the KT strategies, practices and theories researchers and research intermediaries use in the global South, and the challenges they experience, and identifies the types of support required from research funders. The mixed methods design incorporated facilitated learning sessions, a review of the literature, case study selection and analysis, and semi-structured interviews. The research finds that KT is too narrowly defined and a holistic approach is needed support it in the global South. Recommendations for funders include creating challenge funds, taking a programme-level approach to supporting KT, and embracing complexity.

Keywords

Knowledge translation; impact; research uptake; knowledge mobilisation; international development; global South; knowledge transfer; knowledge exchange; funders; donors.

Authors

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Fajri Siregar is a PhD Candidate at the University of Amsterdam, researching civil society-based knowledge production by non-governmental organisations in post-Suharto Indonesia. He has acted as research and policy consultant for **On Think Tanks (OTT)** and other occasions, including for Indonesia's Ministry of Research and Higher Education, the Knowledge Sector Initiative and the Partnership for Governance Reform. Fajri has a keen interest in the production and application of knowledge, especially social sciences. He also teaches sociology at the University of Indonesia and is a former Director of Jakarta-based thinktank the **Centre for Innovation Policy and Governance (CIPG)**.

Foreword

The International Development Research Centre (IDRC) launched its ten-year strategy to 2030 with three core objectives. One of these is to ‘share knowledge for greater uptake and use’. As a funder with more than 50 years of experience investing in research and innovation in the global South, sharing knowledge is neither new, nor a supplement to our business model. Rather, it is a critical component of our mandate. However, Strategy 2030 recognises there is **more** we can do in support of the Sustainable Development Goals. Accordingly, IDRC has committed to giving greater priority to incentivising, enabling and supporting the processes of moving research into action.

This study was motivated by an interest in both contributing to – and learning from – the growing body of evidence on knowledge translation theory and practice. We felt it was important to consider perspectives that cut across disciplinary, thematic and geographic boundaries, and to ensure the study makes a useful contribution to the global literature. Our mandate establishes that Southern perspectives and expertise are needed to drive solutions and responses to development challenges. It follows that our motivation is to ensure the global evidence base is indeed globally representative.

We hope that publication of this study helps bring a more inclusive and diverse understanding of knowledge translation theory and practice to the field. More importantly, we hope the findings and recommendations help catalyse positive change in research for development practice by motivating funders and researchers around the world to keep learning, innovating and adapting to contribute to a more sustainable and inclusive world.

Maggie Gorman Vélez, Director, Policy and Evaluation Division, IDRC

Kristin Corbett, Senior Strategic Knowledge Translation Officer, Policy and Evaluation Division, IDRC

Steering Group

Andrea Ordóñez, Southern Voice

The research sheds light on the need for a more inclusive approach to knowledge translation, emphasising the importance of local actors shaping their strategies and adapting them based on their contextual knowledge. For too long, we have relied on concepts that ignore the high levels of adaptation that take place in the day-to-day practice of knowledge translation in the global South. This thought-provoking report offers valuable recommendations for funders, empowering



them to support effective structures and strategies to enable the use of research to respond to key policy challenges.

Vanesa Weyrauch, Purpose and Ideas

This study leads to a more inclusive and diverse understanding on how the global South, with its on-the-ground experience and wisdom, can increasingly contribute to the development of the knowledge translation field. The research team and IDRC have opened a door to new opportunities: for reflection, for support and hopefully for action.



Amédé Gogovor, Université Laval

It was an honour to be part of this inquiry that offers an exploration of knowledge translation theory and practices in the global South. Drawing on literature, dialogues and case studies, this report provides valuable insights for researchers, practitioners, policymakers and funders seeking to enhance knowledge translation efforts in diverse contexts.



Owusu Boampong, University of Cape Coast

It was such a great opportunity to be part of a multi-actor and multi-level inquiry on knowledge translation in the global South. This study evinces the complexities of knowledge translation and draws attention to organic and grass-roots structures that cannot strictly be explained by received models. For those of us in the global South, bridging different ways of knowing remains central.



Rhona Mijumbi, Makerere University and the Malawi-Liverpool-Wellcome Programme

This is a rare example of research that really makes the effort to try and decipher what, from a practical point of view, is knowledge translation and transfer in different contexts. My hope is that folks will read this important study not looking for all the answers, but letting it provoke an anxiety to ask themselves even more challenging questions about what we see as knowledge and knowledge processes in different contexts. This is how fields of research and practice get built.



Executive Summary

The single most common experience of knowledge translation... is around building bridges between different ways of knowing, while grappling with system-level inequities that go far beyond just the production and use of research.

The research

This study explores knowledge translation (KT) in the global South and provides recommendations for funders to support more effective structures and strategies for the use of research for equitable development. The year-long project explored the KT strategies, practices and theories researchers and research intermediaries use in the global South, and the challenges they experience, and identifies the types of support required from research funders.

The research methodology comprised: (1) a Learning Journey, or iterative and inclusive dialogue between the research team, the funder, and a steering group of researchers and practitioners from the global South; (2) a systemised exploratory review of the literature from the global South; and (3) primary research on the lived experience of KT actors, including researchers, knowledge brokers, research users and key opinion formers in this field.

Key learning

KT is narrowly defined and led by the global North

Concepts of KT, knowledge management and knowledge mobilisation appear to have remained oriented towards the priorities and perspectives of large aid donors and actors in the global North that have historically supported this field's application in the global South. Whereas KT in the South may be informal and indistinguishable from broader research processes, donors tend to focus on narrowly defined KT activities. This agenda has resulted in a sense of disempowerment for many researchers in the South. Case studies in the literature, key informant interviews and think pieces recommend that Southern researchers and knowledge intermediaries should shape their own KT approaches and strategies, informed by their own understandings of desirable outcomes and pathways to change. This requires funders to adopt a more nuanced understanding of KT that focuses on function or purpose (i.e. to facilitate use of evidence), rather than on narrowly defined activities or roles.

KT challenges and enablers are not unique to the global South

An underlying current of dissatisfaction or concern about KT is not a unique feature of the global South. Therefore, we need to differentiate the frictions that exist between academic scholarship and applied learning for social or economic impact from contestations that arise around the perceived imposition of KT agendas that are ill-suited to specific socio-political contexts in the South. Many dimensions of KT challenges and opportunities are not uniquely shaped by hemispheres. Opportunities exist to share learning across diverse geographies, while firmly anchoring KT support in particular socio-political environments. 'Othering' Southern KT practitioners or Southern exceptionalism may only deepen inequalities and cognitive bias.

Local and national actors must shape their own KT strategy

Those in the global South sometimes find the language of equitable research partnerships and co-production to be largely rhetorical. Some respondents struggled to see how KT was being integrated into research processes that align with the priorities of communities. Although recent movement towards the application of principles of equity in North–South research partnerships must be welcomed, in the longer term, decentralisation of research commissioning and leadership in parallel to global research collaboration and flows of funding will also be required to transform KT practice.

A holistic approach to supporting KT is required

The challenge for research donors and researchers is that the emphasis on getting evidence into use does not always deal with broader systemic issues that relate to institutional cultures, cognitive justice and epistemic inequalities, and ultimately to social justice. Concepts of knowledge ecosystems that sometimes accompany donor-driven approaches frequently underestimate political and cultural factors, as opposed to technical infrastructure and relationships, which are shaping dominant research and policy dialogues in particular contexts.

Doing KT in the global South is thus as much about bridging different ways of knowing as it is about the tools to mobilise knowledge. Given that the challenge of KT is less one of moving research into action and more broadly relates to the political economy of evidence production and use, this study suggests that funders and international partners who take a more holistic approach will enjoy more success. This means conceptualising KT as part of the broader research agenda and paying greater attention to context than to narrowly defined KT activities.

Valuing structural investment in research and KT

Every effort needs to be made to connect research commissioning and capacity support with networks of actors that are embedded in the politics of knowledge. Not all change requires new research – support for research intermediaries, networks and knowledge infrastructure is of equal importance to addressing global challenges. These approaches do not always require complex system-level interventions. Measures to support knowledge systems can focus beyond formal state infrastructures. In politically unstable or fast-changing environments, an emphasis on epistemic communities, civil society or informal policy networks and social movements may prove far more sustainable. This potentially extends concepts of KT and research uptake to include outcomes focused on building and strengthening networks, and creating bridges between different epistemologies or ways of knowing.

Bridging the gap between scholarship and practice on KT in the global South

Globally, the research fields concerned with the theories and practice of KT are highly fragmented, focused on the global North and disproportionately concerned with health. This literature fails to engage adequately with Southern perspectives on structural power, equity in knowledge systems, and cognitive justice. There is an opportunity to address these issues in low-income contexts, given the current demand for knowledge in this area. Some of the gaps in the literature we have identified could be addressed if the work was shaped and led by researchers embedded in the contexts being analysed. We need to look beyond generating case studies or evaluating specific programmes and consider what learning can be shared between sectors and regions.

Recommendations for funders

Create KT challenge funds and support institutionalisation of KT culture

Funders should empower researchers and their national and international partners to shape research design and determine their own change objectives. This could include challenge funds that allow research teams to shape their own plans for engaging research with policy or practice. They could do this by embedding these processes within Southern research institutions that take responsibility for assessing proposals and allocating resources. They should also diversify the range of actors who participate in designing calls and commissioning research, such as strategic partnerships with national research councils.

Co-develop culturally appropriate systems for KT monitoring and evaluation

Funders should play a key role by developing and valuing culturally and politically responsive indicators for KT monitoring, evaluation and learning. These must be sensitive to the iterative and informal nature of relationship, and trust-building, and what constitutes success in different contexts. Frameworks need to be grounded in broader and more nuanced understandings of KT that pay greater attention to function and purpose than to the delivery and impact of narrowly defined KT activities or roles.

Take a programme-level approach to supporting KT

Funders should take a more structured approach to supporting research systems. They should create more space for the co-production of research and change agendas, and cease to treat KT in isolation from broader issues and processes relating to equitable research partnerships, social movements, advocacy and governance. They should invest in programme-level knowledge mobilisation initiatives designed to facilitate evidence use that combine practical support around research synthesis and uptake with deliberation, led by researchers from the South, on pathways to change and structural barriers to KT in their context.

Strengthen research capacity and facilitate mutual learning

Funders can play a key role in facilitating mutual learning between KT actors. They should incorporate capacity-strengthening costs that cover a range of capabilities, from more traditional research communications, to community engagement and advocacy, to knowledge brokering and policy influencing.

Support multi-actor, multi-level networks for mobilising diverse forms of knowledge

Funders should take a more holistic approach to strengthening the capacity of multi-actor networks that have a common interest in solving a particular problem. Bilateral donors are in a unique position to broker relationships between their country missions or posts and regional offices, local researchers and knowledge intermediaries, governments, communities and global policy actors. Rather than supporting KT in isolation and solely in relation to specific research investments, address the broader issues that relate to evidence production and use.

Position Southern research for global learning and engagement

Funders can support Southern researchers to make their work more accessible on a global scale. Meaningful investment can connect local knowledge and research to global debates. Supporting Southern researchers to publish internationally and participate in global dialogues remains essential for both international science collaboration and more inclusive global policy.

Embrace complexity and risk

Donors should be willing to learn from failures and celebrate them as learning opportunities, creating a more authentic relationship with grantees. KT actors in the global South understand that change is non-linear, that major disruptions occur that derail research to policy and practice initiatives and that some successes are down to serendipity. By sharing a more realistic and contextualised understanding of KT, donors and Southern research communities can build more equitable, productive and impactful initiatives together.

Pioneer new understandings of how to make sense of and mobilise research evidence in diverse settings

Funders can support a research agenda based on the gaps in the literature and discussions in our Learning Journey that relate to questions around gender and social inclusion in the production and use of knowledge, challenging knowledge hierarchies, and conducting political economy analysis. This research looks at KT within a broader context of global and local challenges.

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Acronyms

FCDO	Foreign, Commonwealth & Development Office
HIC	high-income country
IDRC	International Development Research Centre
IDS	Institute of Development Studies
IPCC	Intergovernmental Panel on Climate Change
KT	knowledge translation
LMICs	low- and middle-income countries
MIDIS	Ministry of Development and Social Inclusion (Peru)
OTT	On Think Tanks

1. Introduction

As the world reels from the long-term impacts of the Covid-19 pandemic and grows accustomed to an environment of multiple crises and acute uncertainty, the demand for a better understanding of the equitable creation and mobilisation of knowledge continues to grow. This challenge cuts across sectors and geographies, and is inextricably linked with contestations around the production of research, who it is produced by and for whom, and for what purpose. For funders of research, whether multilateral, bilateral or philanthropic, these questions carry particular importance.

A desire to increase the likelihood that research has a positive impact beyond academic outcomes has become a central pillar of research commissioning processes, with many devices designed to incentivise, track and report changes in awareness and behaviours, capacity and relationships, and policy formulation and implementation that can be attributed to a research process. However, we have also seen growing concerns around more instrumental understandings of evidence use and knowledge hierarchies that favour some ways of knowing over others.

The Institute of Development Studies (IDS) and On Think Tanks (OTT) therefore welcomed the opportunity to partner with the International Development Research Centre (IDRC) to learn more about knowledge translation (KT) in the global South. It represented an opportunity to contribute to a growing body of evidence on knowledge for development that cuts across disciplinary, thematic and geographic boundaries.

This study explores KT processes¹ in the global South or low- and middle-income country (LMIC) contexts.² It is our intention for this research to provide learning and concrete recommendations that will enable development research funders and their partners to support more effective structures and strategies for the use of research in addressing poverty, poor health, social exclusion, socioeconomic crises and equitable development. It acknowledges a historic over-reliance on literature focused on high-income countries (HIC), and on health and education in this field.

We have attempted to use a much broader focus, with the inevitable trade-offs between depth and breadth. This is the inquiry idea that has driven this research, which is underpinned by our commitment to contribute to a more inclusive and diverse understanding of KT theory and practice. We do not intend 'to other' KT

1 We are using a very broad and inclusive definition of KT processes: 'processes involving intentional dialogue between a range of actors in order to support the use of research-based evidence to inform decisions and influence behaviours, policies, and practice' (Siregar *et al.* 2023).

2 Global South is used consistently throughout this report as the preferred terminology. However, some references are made to LMICs to reduce repetition or where we refer to state capacities.

in the global South, and fully accept that KT theory and practice in Southern contexts may have important lessons for academics and practitioners in the global North and vice-versa. We set out to explore the state of the knowledge that already exists in the literature focused on the global South and test the efficacy of some of the dominant models for the interaction of science with policy and practice. In parallel, we focused on the lived experiences of practitioners, donors and researchers from diverse contexts who are seeking to mobilise marginalised voices and inform progressive change with evidence. We have striven to ensure that this has been an inclusive and participatory process, in which the research team behaved with reflexivity and humility. Therefore, it seems highly appropriate that our overall observation is that in the global South the common denominator across all dimensions and understandings of KT is the explicit or implicit desire to bridge different ways of knowing.

The report brings together the three strands of the project: (1) a Learning Journey, or iterative and inclusive dialogue between the research team, the funder, and a steering group of researchers and practitioners from the global South; (2) a systemised exploratory review of the literature; and (3) primary research on the lived experience of KT actors, including researchers, knowledge brokers, research users and key opinion formers in this field. The analysis and findings combine learning across these three dimensions of the project, which were inextricably interlinked and co-dependent. Readers wishing to explore the research further are advised to read the separate and more detailed outputs from the Literature Review (Combaz, Connor and Georgalakis 2023) and the primary research (Siregar *et al.* 2023).

2. Methodology

2.1 Research questions

We identified two key dimensions this research project needed to address. They are concerned with: (1) building a more inclusive and diverse understanding of KT theories and practice; and (2) documenting the institutional models and roles of research organisations and programmes. Across these two dimensions we set out to address the following research questions:

1. What are the KT strategies, practices and theories researchers and research intermediaries use in the global South?³
2. What challenges to practising KT do researchers and research intermediaries in the global South experience and why do these challenges persist?
3. What types of support do researchers, research intermediaries and research users in the global South desire from research funders?

These research questions evolved somewhat as part of the Learning Journey approach set out below. A series of sub-questions were developed for the literature review and primary research, respectively (Combaz *et al.* 2023; Siregar *et al.* 2023: 8).

2.2 Research strategy

This project offered a valuable opportunity to collaborate with a prominent development research funder on a study and accompanied learning process that would build on what has come before, but deliver new approaches and insights. These elements needed to be grounded in Southern experiences and knowledge, and question the relevance of established policy and practice. Jointly with IDRC's Policy and Evaluation Division, we co-convened a Learning Journey (a series of accompanied learning sessions) over the 12-month project.

The Learning Journey challenged and reformulated our initial conceptual framework and further developed our research questions, helped identify research participants, and provided opportunities to share initial findings. This phased accompanied learning-based approach to KT research ensured that our analysis embraced a diversity of perspectives, and funder and researcher experiences. Our overall aim was to explore understanding and awareness of how KT is actualised in the global South, and identify learning for funders

3 Research intermediaries include those brokering research such as communications practitioners, civil society advocates, members of research and policy networks, and communities of practice. The project did not engage directly with policymakers or civil servants operating within government structures.

seeking to support the use of research generated evidence. The guiding principles of the inquiry were to:

1. Directly address structural inequalities that characterise the global knowledge system through a purposive research design that privileged Southern voices, and directly addressed gender equity and social inclusion.
2. Take a phased flexible approach, rather than assume we could systematically identify a finite literature and key informants on a topic as broad as this at the start of the project. We had an empirical focus, reviewing and assessing the breadth of available knowledge spanning academic and grey literatures.
3. Look across disciplines and geographies in the global South, and engage with the complexity of how context and conditions influence the outcomes from different types of engagement mechanisms.
4. Share new learning with Learning Journey participants as it emerges around different mechanisms from different contexts and collectively reshape the investigation.

This approach recognised that past reviews of KT practice among researchers have often failed to look across disciplines and geographies and engage with complexity. The experiential knowledge of research-into-use practitioners recognised that evidence-informed policy and practice are political, contested and non-linear, and require research and interventions to encourage mutual learning and sensemaking, support transdisciplinarity, and work across geographic and sectoral boundaries. Despite this, many studies have tended to focus on either the supply side and researchers' perspectives, or the demand side and policy actors' experiences.

Evidence on the impact of funders, networks, knowledge brokers, organisational systems and tools is fragmented across literatures and often favours Northern perspectives (Lavis 2022). All too often, disciplines including public administration, political science, implementation and behavioural science fail to combine their knowledge of what we need to do differently. The same can be said of those operating in the private sector, bilateral and multilateral organisations, civil society and broader academic fields, including development studies. Meanwhile, the lived experiences of researchers, knowledge intermediaries and evidence users in the global South are frequently absent from the published literature, misunderstood, or extracted and used in analytical frameworks of limited relevance to their socio-political context.

It is with all this in mind that we designed an accompanied learning-based approach that would create a safe space for mutual learning, and combine different knowledge and perspectives. Our experience on programmes such as

the Impact Initiative,⁴ Think Tank Initiative,⁵ and Knowledge, Evidence and Learning for Development⁶ have demonstrated the importance of building relationships, supporting co-ownership and working across disciplines and geographies. The Learning Journey cut across boundaries, prioritised Southern voices and created a process that was underpinned by rigorous applied research.

Our understanding of the desired impact of this research and learning project was shaped by IDRC's mandate, which establishes that Southern perspectives and expertise are needed to drive solutions and responses to development challenges. The objectives were to:

1. Improve understanding of current trends, gaps, opportunities and challenges for KT in the global South.
2. Strengthen relationships and behaviours that support KT innovation.
3. Enhance support for KT strategies and approaches that support development.
4. Further the transdisciplinary KT field, and its grounding in Southern experiences and learning.

2.3 Conceptual framework

The interest in the theory and practice of engaging research with policy and practice goes back several decades. Although much related scholarship sits within the health sciences, it has roots in sociology of science, science and technology studies, and social and political theories relating to cognitive justice. It has therefore become an important feature across disciplines, sectors and geographies. A commonly used term in some sectors to describe these processes of bridging science and practice is 'knowledge translation'. A significant literature has established KT as a field of study, particularly in health research in HICs (Oliver *et al.* 2022; Boaz, Fitzpatrick and Shaw 2009; Farley-Ripple, Oliver and Boaz 2020). If the discourse about KT in the global South seems to be less well established, this may be because it does not currently reflect long-standing perspectives and work on the politics of knowledge emanating from the global South that have been applied to sectors including agriculture and farming (Chambers 2017).

Work has been conducted to investigate the use of knowledge or evidence to inform practice, policy formulation and implementation, with authors discussing the nature of these processes and theories of knowledge. For instance, Graham

⁴ **The Impact Initiative.**

⁵ **Think Tank Initiative (TTI).**

⁶ **Knowledge, Evidence and Learning for Development (K4D).**

et al. (2006) provide a categorisation and conceptual framework for thinking about the processes that integrate the roles of knowledge creation and knowledge application, describing different forms of KT, exchange, transfer and brokerage between research and policy and practice. Numerous attempts have been made to disaggregate the use of KT-related terminology, which includes: knowledge mobilisation, research uptake, research utilisation, evidence into use, knowledge brokering, knowledge transfer and research impact. In the health sciences alone, over 100 different terms have been associated with KT (McKibbon *et al.* 2010).

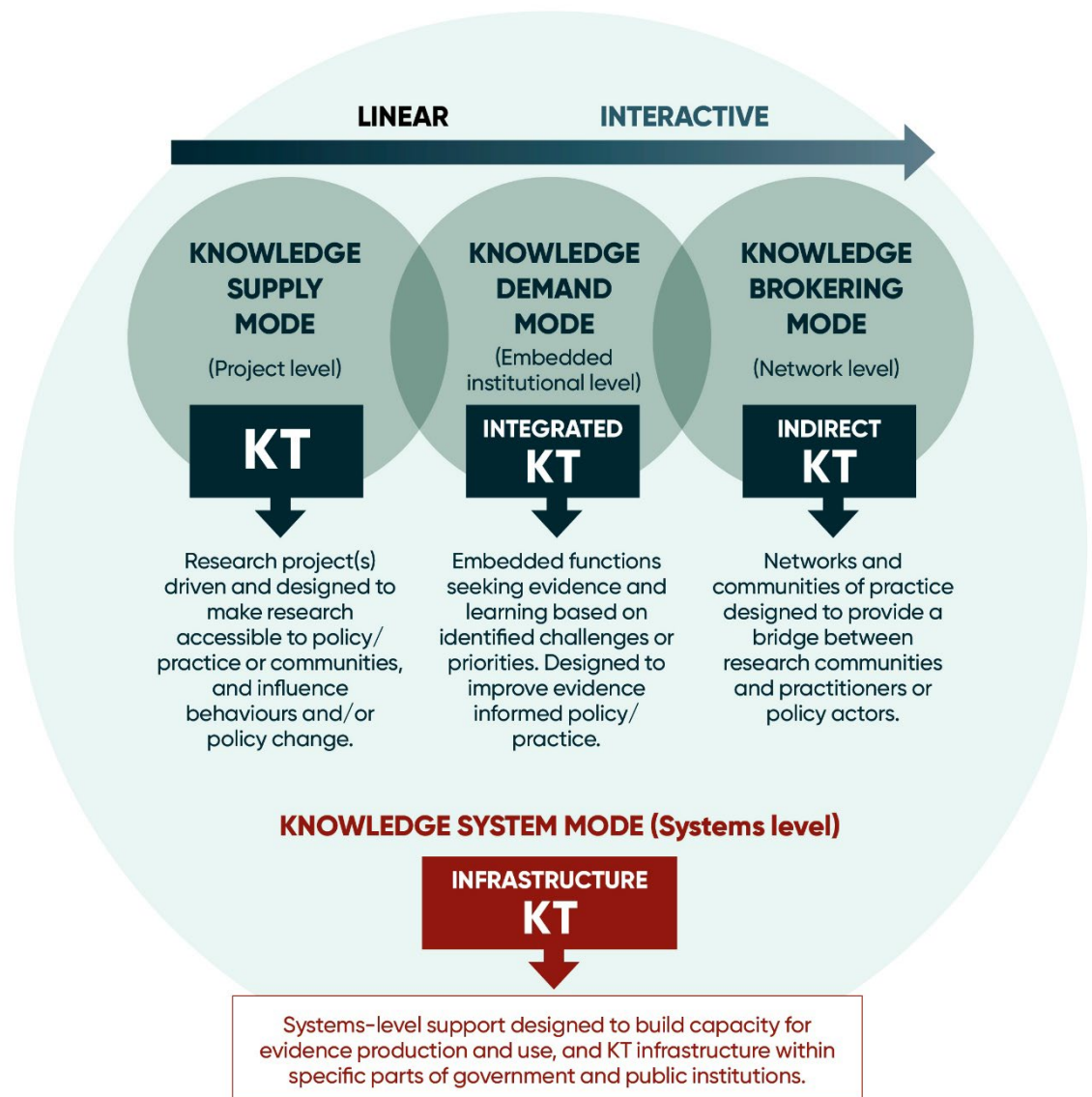
The wider academic literature has identified a series of processes that can be differentiated by the causal relations or types of interactions between research and policy or practice (Fransman 2018). Several authors describe linear supply-driven research engagement (Huberman 1994; Weiss 1979), linear demand-driven knowledge transfer and scientific advice (Lavis *et al.* 2003; Ward *et al.* 2021), bridging the gap between supply and demand (Holmes *et al.* 2017), and system-level interventions that are designed to facilitate and enable knowledge exchange (Boaz and Gough 2014). Complexity-informed approaches from science and technology studies conceptualise these processes beyond supply vs demand or barriers to transferring knowledge. Jasanoff (2004) contributed to understandings of the co-production of science and social order, and the ways that science-to-policy processes are embedded in particular political cultures.

These ideas challenged concepts of research as a neutral commodity that can be transferred or translated, and build on work by feminist scholars such as Harding (1991) that say the knowledge of marginalised groups is actively suppressed. While in the global North we have increasingly witnessed scholars and practitioners seeking to address how knowledge is produced to bring together different ways of knowing (Cook and Brown 1999; Fricker 2007), these ideas have long been explored in the global South. Literatures on the value of rural people's knowledge and indigenous knowledge, such as the Farmer First movement, raise fundamental questions about the underlying processes in KT activities (Scoones, Thompson and Chambers 2009). This applies in equal measure to participatory, community-informed research that seeks to promote cognitive justice (Abraham 1999; de Sousa Santos 2018; Chambers 2017).

We present here a conceptual framework (Figure 2.1) that builds on these literatures from the global North and global South to identify a preliminary description of different causal processes that may relate to KT. Our purpose is to avoid biasing the study towards any particular causal process, such as more linear perceptions of science to policy, or towards more political or interactive models. This helps us ground our very broad definition of KT in a range of change processes which can then inform the scope of the inquiry. The framework we have developed encompasses four interconnected modes of KT

that describe how knowledge from research may interact with policy and practice (Georgalakis 2022). This spectrum of KT modes starts with straightforward linear research engagement processes (supply-driven, project-based KT); goes on to describe demand-driven, embedded KT (integrated KT); and then identifies brokering, network-level KT (indirect KT). Combining elements of all these causal processes is a system-level mode (infrastructure KT) that seeks to strengthen a knowledge ecosystem. These modes are all related to interventions designed to enable the use of research-based evidence to inform behaviours along a range of increasingly interactive processes.

Figure 2.1: Conceptual framework – four modes of KT



Source: Georgalakis (2022). Reproduced with permission.

This framework does not assume that knowledge or research is value free. We are highly cognisant of the power dynamics and sociocultural factors that shape these processes, and which may privilege some types of knowledge over others. This framework was used to shape the initial study design so that it would explore a range of KT processes.

2.4 Methods and limitations

2.4.1 Summary

The 12-month study was designed to address the research questions through a combination of three parallel inquiry methods: (1) a Learning Journey or continuous learning process that informed the design and implementation of the project; (2) a systematised exploratory mapping of the KT literature; and (3) primary research consisting of a pulse survey, and key informant interviews with practitioners, funders and experts, as well as case studies and the commissioning of think pieces. The literature review informing this report is exploratory and the focus on research evidence provides a very limited definition of what is knowledge.

2.4.2 Learning Journey (February 2022–January 2023)

A continuous learning process informed the design and implementation of the project. Learning Journey participants included staff representing IDRC's different programming streams and corporate functions, as well as the IDS and OTT project team members, and a group of practitioners and scholars from the global South. A core reference group of about ten members from across these groups closely accompanied the learning process, and additional individuals joined meetings at specific points as deemed useful. Six Learning Journey meetings were convened over the course of the year.

The Learning Journey is a collaborative inquiry process that explores and responds to a specific institutional issue or challenge. Led by IDS, the Knowledge, Evidence and Learning and Development (K4D) programme pioneered this methodology. IDS' Knowledge, Impact and Policy Cluster later extended the programme's original thematic approach to address institutional learning issues, particularly around the production and use of evidence (Howard, Quak and Woodhill 2022; Clark, Carpenter and Taylor 2022). It consists of a series of accompanied learning sessions and places strong emphasis on building ownership with the key agents and audiences of the learning process. This helps ensure the relevance and usefulness of the Learning Journey.

The Learning Journey refined the conceptual framework (Figure 2.1) and research questions. It helped identify relevant literatures, and research participants shared and discussed initial findings and considered the implications for the project.

2.4.3 Southern Steering Group

The Southern Steering Group's role was to help inform the investigation. This was an opportunity for members of the group to influence the design and execution of the study, and analysis of the results. While IDS and OTT were responsible for delivering the agreed outputs, the steering group helped ensure that a diverse range of perspectives from the global South underpinned the work. These included perspectives of scholars of evidence-informed policy and practice studies and the political sciences, research-to-action practitioners, researchers and thought leaders in knowledge for development. IDRC, IDS and OTT proposed members based on their networks and a desire to achieve a diverse group that would bring a range of perspectives from different regions, sectors and disciplines.⁷

The steering group's responsibilities included: participating in learning events; providing intelligence on potential audiences and research users; sharing learning from the study across their own networks; reviewing research objectives, scope and methodologies; highlighting specific issues relating to engaging research with policy and practice in the contexts in which they worked; reviewing draft reports; and ad hoc engagement between the chair and project principal investigator for advice and guidance. After each Learning Journey session, the steering group met with the research team and agreed how to incorporate the learning into the project.

2.4.4 Exploratory mapping of the literature (April–December 2022)

There has been a historic over-reliance on literature from the global North written in English in this field, and a persistent lack of attention to power and to the plurality and complexity of political contexts, sectors, knowledges and actors involved in KT (Jones, Datta and Jones 2009). Given this situation, as well as possible differences in the applicability of findings originating from the global North to the global South, we undertook a trilingual literature search (in English, French, and Spanish) and mapping, which aimed to explore the literature in and from the global South. The exploratory mapping was based on a mix of review methodologies and can be characterised as a systematised review (Grant and Booth 2009), combined with a thematic content extraction and narrative synthesis.

A literature search in academic databases, as well as in Google and Google Scholar, was used to capture both peer-reviewed and non-peer-reviewed literature. The research did not aim to be a systematic review or a meta-review,

⁷ The Southern Steering Group members were: Andrea Ordóñez, Southern Voice (Chair); Owusu Boampong, University of Cape Coast; Amédé Gogovor, Université Laval; Imran Matin, BRAC Institute for Governance and Development; Rhona Mijumbi, Head of the Policy Unit at the Malawi-Liverpool-Wellcome Programme; and Vanesa Weyrauch, Purpose and Ideas.

nor to generate new primary analysis of published knowledge. Instead, its focus was on reviewing and assessing the breadth of available knowledge, prioritising references with broad geographic and sectoral scopes for analysis. In addition, the review aimed to have an empirical focus – in other words, not focusing on conceptual or theoretical issues and debates; but, rather, actual experiences of KT through empirical material.

A strategy for the literature search was developed to define the final search terms in the three languages. Preliminary searches were conducted using the expression 'knowledge translation'. Academic literature was searched using Web of Science and, as a complement for Southern literature, Google Scholar. Grey literature, including peer-reviewed and non-peer-reviewed practitioner and policy literature, was searched using Google and Google Scholar. Searching on the exact expression 'knowledge translation' in the three languages resulted in numerous publications, but with a narrow scope. This confirmed that while KT practices exist in diverse contexts and forms worldwide, the vast literature about KT does not necessarily refer to it as 'knowledge translation'. Therefore, search terms were broadened and tested. The final search terms included the exact expression 'knowledge translation', and immediately related expressions, with broader synonyms and associated terms about knowledge (such as research, evidence or lessons) and KT (such as 'evidence-based', or knowledge + policy, action, practice or citizen).

The concept of 'global South' was approached in an open-ended way and included anything labelled as 'global South', as well as all countries other than high-income ones, and countries and territories with middle- or low-ranking socioeconomic indicators in sub-Saharan Africa, Central and South America and the Caribbean, Asia and the Pacific, the Middle East (Western Asia) and North Africa, and the Caucasus and Balkans. There was no restriction on sectors included in the review.

Owing to the multitude of references found in the preliminary searches, the present paper only investigated publications from the previous five years (i.e. since 2017). Academic publications included scientific journal articles, proceedings and literature reviews (all peer reviewed), while grey literature included publications such as reports, case studies, policy briefs, guidance notes, manuals and capacity-strengthening materials, guides on resources, meeting summaries, periodicals such as bulletins, books, working papers, presentations at conferences or workshops, and web pages, including blog posts. The review did not include programme related publications, such as programme reporting, annual reviews and programme evaluations.⁸

⁸ For a full explanation of search terms and the approach to reference categorisation, selection and analysis please refer to the review which is published in full (Combaz *et al.* 2023).

2.4.5 Primary research (August–December 2022)

The primary research was framed broadly to ensure it covered the full spectrum of KT causal processes set out in our conceptual framework (Figure 2.1).

Therefore interviews, surveys and case studies focused on KT defined broadly as: ‘processes involving intentional dialogue^[9] between a range of actors in order to support the use of research-based evidence to inform decisions and influence behaviours, policies, and practice’ (Siregar *et al.* 2023).

Primary research consisted of qualitative data collection methods. We employed the following tools over an intensive four-month period of data collection: (1) pulse survey; (2) key informant interviews; (3) case studies; (4) think pieces; and (5) sense-making session. Consultative meetings with the project’s steering group and regular Learning Journey sessions were not part of the data collection *per se*; however, they contributed to the triangulation of findings. Throughout the project we requested permission to assign authorship of the ideas, cases and examples presented to the protagonists. To that end, we obtained approval from our key informants and from participants in the Learning Journey sessions, the steering group and think pieces to cite them by name.

The main aim of the short survey was to gain preliminary insights into funders’ perceptions of the challenges in KT in the global South. The research team sent out a survey to IDRC programme officers and extended it to representatives of donor organisations within OTT and IDRC’s networks. The survey was sent out in the three languages. We were cognisant that surveys can elicit low response rates, hence our multi-modal approach incorporated a range of data collection methods. Key informant interviews were the primary data source in this research. Semi-structured interviews were designed for informants we classified as practitioners, experts and funders. We defined practitioners as anyone working in the field of KT and its wider environment. Experts were understood as academic researchers on KT as a subject and individuals who have significant experience of working in the field. Meanwhile, funders were individuals who work in donor institutions and have roles with relevance to the field of KT. The overall selection of informants was based on the following criteria:

- Sectoral representation to avoid overrepresentation of one field – in particular, to avoid the overrepresentation of experts from the field of health, who were found to be disproportionately prevalent in the literature review.
- Regional representation, to reflect possible differences between research traditions, languages and post-colonial experiences.
- Gender balance.

⁹ We use dialogue instead of, for example, engagement, because this is a term easily translated and understood in other languages. A recent study by OTT for Wellcome Trust on public engagement (see Patel and Yeo 2022) found that the term engagement did not translate well into Spanish, thus making conversations about developing a field difficult.

- Representation of the range of KT modes, as expressed in our framework and which informed the initial search for cases (see Figure 2.1).

2.4.6 Limitations

The literature review informing this report is exploratory, and does not claim to be a systematic review, meta-review or similar. It is not based on systematic searches, but rather on structured searches combined with non-systematic snowballing and recommendations. Likewise, it is not based on systematic content analysis, but rather offers a mapping of relevant publications, and an initial documentation and critical discussion of Southern KT models. There are undoubtedly significant innovations underway in KT in the global South that have not yet been sufficiently documented or framed in ways that would have allowed this review to pick them up.

The primary research focus on research evidence provides a very limited definition of what knowledge is. We fully recognise that this is only one dimension of knowledge, and that there is likely to be significant variation in how study participants understand 'knowledge'. We feel that using research evidence offers an anchor to the study in the identification of KT examples, but that the research questions allow for a broader exploration of how 'knowledge' is understood more widely. Furthermore, we are not limiting ourselves to a narrow range of causal processes but designing the study to look across diverse modes of KT and forms of dialogue as set out in the analytical framework.

The case studies were not meant to be representative of KT practice across the global South nor useful as a means of comparison. Each case needs to be understood within a particular context that affects all aspects of KT from its inception through to its outcome. During data gathering we encountered limitations; the collected information should be treated with certain caveats in mind. General limitations in scope and validity include:

- Difficulty targeting grass-roots practitioners.
- Many informants working in intermediary organisations who may not perform on-the-ground activities or engage directly with communities with regard to KT.
- Difficulty mapping KT in East Asia and the Caribbean.

Any terms used to describe the global North and global South are contested and come with conceptual, theoretical, ethical and political limitations. Large bodies of literature offer solid critiques of related terms such as 'HICs' vs 'LMICs'. One shared challenge is that these categorisations are binary and so broad that they are inevitably oversimplifications. Grouping countries into one of two categories ignores major differences in the profile of their development and in their histories, societies and economies. Alternatives that spell out lists of specific countries and regions quickly become unwieldy if they need to be used repeatedly in writing.

Consequently, by agreement among the project partners and the Southern Steering Group, this research refers to 'global North' and 'global South' as the least unsatisfactory terms. The paper's authors acknowledge that this terminology still has limitations and is problematic in some respects, among others because its broad grouping of countries erases important differences within each category, and because it is vague about which countries are assigned to which side of the binary. However, there is a risk here of blurring the boundaries so much that we negate the purpose of this study and others like it altogether. As one of the steering group members put it: 'Catering for the global South starts with acknowledging its existence.'¹⁰

2.4.7 Research ethics

An internal ethics review on the research proposal IDS undertook considered this research low risk. The research team upheld all the standards stipulated by the IDS Research Ethics Policy, while also being aware of positionality and potential bias when selecting and conducting interviews with informants who mostly identify as researchers and practitioners from the global South.

The primary research team, who mostly have Southern backgrounds, believe that in some instances the multinational character of our team helped informants disclose information more fluidly. This included conducting three interviews in our informants' first language (two in Spanish and one in Bahasa Indonesia). Research participants did not receive any payment or in-kind compensation for taking part in the research.

2.4.8 Confidentiality and data management

- A consent form and information sheet on the research purpose was shared with all informants prior to interview. All informants were required to fill in and submit the form to the research team.
- Permission for the identification of research participants, projects and institutions by name and direct quotations was obtained – where we do not have any such agreement in place, participants have been pseudonymised.
- The research team asked for permission to record interviews, the sense-making session and other platforms of discussion.
- Consent forms were returned and stored on a secure IDS server.
- All full recordings and transcripts are stored on a secure IDS server with undisclosed file names (using initials only).
- All participants were notified of their right to withdraw from the study.

¹⁰ Southern Steering Group member (anon.).

3. Results

3.1 Literature search

The final literature searches were run in March 2022 in Web of Science (Web of Knowledge), and March and April 2022 in Google and Google Scholar. Web of Science was chosen because it covers a wide range of disciplines – from medicine and natural sciences to social sciences and humanities – and various journals within each discipline. In addition, a non-systematic snowballing from a few of the publications found through the structured searches was used, examining the reference list of the given publication or the web pages associated with it to examine additional publications that did not come up in the systematic searches. References were considered eligible for inclusion if they had an empirical focus on KT in the global South.

In total, 202 references were included in the mapping of the literature: 87 per cent (n = 176) were written in English, 4 per cent (n = 8) in French, and 9 per cent (n = 18) in Spanish. In total, 152 references (75 per cent) were scientific references, such as research publications (n = 87), literature reviews (n = 62), scientific journal editorials (n = 2), and a master's thesis (n = 1). Furthermore, 14 references were books and one a book chapter. The grey literature amounted to 35 references, encompassing reports (n = 24), working papers (n = 5), discussion papers (n = 2), and others such as rapid response documentation, manuals and seminar write-ups (n = 4).

References were categorised into seven main categories. Most articles (n = 83, 41 per cent) were categorised as cross-cutting references, which did not have a specific geographic focus. Of these, 23 (28 per cent) references did not have a specific sectoral focus, while 32 (39 per cent) focused on health-related topics. Furthermore, ten references (12 per cent) concerned environmental topics in several regions, and seven (8 per cent) education-related topics. A further five references (6 per cent) addressed information and communication technologies, and four (4.8 per cent) were related to agriculture. The remaining references presented topics related to infrastructure and hygiene.

Four categories were created representing geographical areas. In total, 30 references were related to topics in sub-Saharan Africa, of which 19 (63.3 per cent) concerned health and 36.7 per cent (n = 11) were references that did not have a specific sectoral focus. The second category comprised references that addressed topics in Latin America and the Caribbean. This category consisted of 15 references, of which six (40 per cent) did not have a specific sectoral focus, six (40 per cent) were health related and three (20 per cent) related to agriculture. There were two references that addressed health-related topics in the Middle

East and North Africa region, and eight references that addressed topics in Asia and the Pacific region. Of these, seven references were related to health.

Another category of references centred on intersecting factors. In total, 25 references were categorised into this group. References addressed topics such as disability (n = 8, 32 per cent), age (n = 6, 24 per cent), race (n = 2, 8 per cent) and gender (n = 2, 8 per cent). The remaining references focused on health, education or did not specifically address one topic. The last category comprised references that concerned different types of KT actors. Most of these references (n = 12, 31 per cent) related to universities and research institutions. Furthermore, nine references (23 per cent) related to knowledge brokers and seven (18 per cent) to KT networks. The remaining references addressed KT by grass-roots organisations (n = 5), research funders (n = 4), non-governmental organisations (n = 2), and KT by end user (n = 1) and art (n = 1).

The exploratory literature review report contains the full results, including a structured bibliography and mapping of the state of knowledge on KT in the global South to support further study in this field (Combaz *et al.* 2023).

3.2 Primary research data¹¹

Our approach was informed by the findings from the pulse survey and key informant interviews. The case studies allowed for a deeper dive into KT activities and analysis of their implementation, as well as the context in which they were delivered. On top of the case studies, the primary research also profiled eight KT examples (snapshots) that added more insight into forms of KT practices that could not be treated as case studies due to practical considerations.

We explored emerging ideas in the field of KT through commissioned think pieces authored by KT practitioners from across the world. The choice of authors and the questions we posed them were informed by the preliminary findings from the key informant interviews and case studies. We subsequently topped up our data with content analysis conducted on a series of KT snapshots via a selection of programme materials. A meet-up at the end of the data collection was organised to share early findings and as an attempt to 'make sense of them' with the research participants. The initial findings from the primary research were also discussed and analysed in the Learning Journey meetings and by the steering group.

¹¹ To explore the primary research data in more detail, including the case studies and think pieces see Siregar *et al.* (2023).

Table 3.1: Primary data

Method	Data	
Pulse survey 29 June– 21 August 2022	The research team received a range of valid responses from funders based in the global North – mostly programme officers – engaged in the field of KT and evidence use (n = 9)	
Key informant interviews 7 July– 16 September 2022	n = 21 Practitioners: 15 Experts: 3 Funder: 3 Male: 9 Female: 13 Global North: 6 Sub-Saharan Africa: 7 Middle East and North Africa: 1 Americas: 4 Asia and the Pacific: 3	
Case studies and snapshots September– December 2022	Intergovernmental Panel on Climate Change (IPCC) Report	Pan-African
	Sugary Beverage Tax in South Africa	South Africa
	Center for the Implementation of Public Policies for Equity and Growth (CIPPEC)	Argentina

	Evidencia Ministry of Development and Social Inclusion (MIDIS)	Peru
	Vaaka Media – <i>In the Field</i> podcast	India
	Evidence Tori Dey	Cameroon
	Photovoice	Kenya
	Colabora.Lat_regional	Mexico, Argentina, Bolivia, Chile, Colombia, Guatemala
	Use of evidence helpdesk	Benin
	Citizen Voice: The Arts as a Vehicle for Knowledge Co-construction	West Africa: Senegal, Mali, Mauritania
	The Conversation	Indonesia
	Bidur Water Forum	Nepal
	Cluster of public events	Pan-African
	Festival	Zambia
	FrameLab	Global
	Micro Theatre on Democracy and Corruption	Peru
Think pieces	Democratising Research for Progressive Change: The Experience of Malaysia's The Centre	Malaysia

September– November 2022	Knowledge Translation in the Global South: A Language Perspective	Sri Lanka
	Building the Future of Knowledge Translation in the Global South: Perspectives from Latin America and the Caribbean	Latin America and the Caribbean
	Are Greater Diversity, Participation and Inclusivity Compatible with Greater Impact?	Global
	The Future of Evidence-informed Decision-making Practice: Redefining Perspectives for Improved Impact	Ghana
Sensemaking session 2 November 2022	A one-off sensemaking session was held virtually, attended by six informants – out of 21 invitees – who participated in this research.	

Source: Authors' own. Created using data from OTT.

The primary data covered stakeholders ranging across policymakers, civil servants, the private sector, practitioners, indigenous communities, the public, civil society groups and researchers. Sectors and disciplines included natural sciences, technology and industry, economics and fiscal management, education, food and agriculture, climate, governance, resource management, public health, and social protection. The geographic spread was broad, though East Asia and the Caribbean were under-represented.

We do not attempt to analyse here the research results from the literature review and primary research in isolation. Instead, we present in the following sections the findings that have emerged across the three strands of the project.

3.3 Understandings of KT in the global South

3.3.1 Summary

As the study progressed and a picture of the literature on KT in the global South began to emerge, along with discussions in the Learning Journey and planning of the primary research, some shifts took place in the emphasis of our original research questions. Southern perspectives on KT suggested that we needed to take a step back from exploring specific examples of KT mechanisms and tools to establish a common understanding of KT. By focusing on formal, documented KT tools there was a risk of missing important variations in why it is done, by whom and for whom.

The literature on KT in the global South shows a greater focus of references on types of stakeholders and tools than on causal processes and types of intended outcomes where analysis was limited. This provided challenges to using our initial conceptual framework, with its emphasis on the four modes of KT. The references included in the review also showed disparate coverage of types of KT activities and interventions, with a greater focus on supply- than demand-side mechanisms; and dominated by formal, top-down approaches, as opposed to self-directed, informal types of KT (Combaz *et al.* 2023).

We therefore present here an assessment of different understandings of KT. This breaks down into: (1) conceptual understandings of KT; and (2) gaps between dominant theories and practices in the global South.

3.3.2 Broader KT concepts and the realities of knowledge for development

The study has consistently highlighted concerns that narrow definitions of KT and attempts to identify mechanisms for moving research into practice fail to capture the realities of knowledge for development. The exploratory mapping of the literature could be wrongly interpreted to suggest that many researchers and research institutions in low-income countries practice KT only to a limited extent. Their practices are certainly unevenly documented; one frequently encounters a narrow range of less interactive KT activities, with little apparent attention to target audiences (Combaz *et al.* 2023).

However, the primary research suggests that this is not an indication that research in the global South is less focused on influencing behaviours than it is in higher-income countries. Narrow definitions and understandings of KT built around concepts of getting evidence into use may simply fail to encompass the range of strategies researchers and research intermediaries deploy in different contexts (Siregar *et al.* 2023).

Understanding how researchers, knowledge intermediaries and development practitioners in the global South perceive the act of translating knowledge became central to our research. The primary research suggests that many informants refer to KT as another way of saying evidence use. Using evidence for a specific impact, be it informing policy, decision-making or behaviour, is the most frequent understanding we encountered in the interviews. Several informants alluded to the need to close the gap between producers and users of knowledge in collaborative ways: '[to] reduce [the] gap between science and policy by bringing researchers and policymakers together to collectively define the problem and find solutions to address it'.¹²

However, the survey and interviews also elicited examples of KT that showed a broad range of understandings of KT, drawing on different examples of processes and deliverables ranging from concepts of co-production and capacity building, to building relationships, and science communications designed to engage wider publics such as the production of multimedia. Meanwhile, the KT literature is even broader, providing insights into processes that are frequently referred to as Knowledge Transfer (as opposed to translation) that encompass evaluation, pilots and trials, research commercialisation, academic or spin-off companies, patents or licences, and technology transfer or industry-academia relations (Guerra, Orjuela and Cárdenas 2018 in Combaz *et al.* 2023). KT rarely means the literal translation of research after it is finished, or supporting the use of research as the last step in a process involving actors that operate in completely different spaces. This was reflected in interviews by the broad suite of terms and processes we encountered that participants thought of when reflecting on KT. They included participatory action research, evaluation and learning, science advice, and evidence-informed policy and practice.

To illustrate this point, research organisation Participatory Research in Asia has used action research for over 30 years as a means to co-produce knowledge with communities and advocate findings to policymakers – the very essence of doing KT:

*So, this is what we call knowledge co-creation or knowledge democracy... the terms we are using under this larger umbrella and these are the words, these are the terminologies we are using to explain when we are working with different constituencies and different actors... we are actually taking that knowledge process from the communities or any subnational level institutions and organisations and helping that knowledge to actually take a lead in that whole process.*¹³

¹² Interview with Rose Oranje, African Institute for Development Policy, 8 August 2022.

¹³ Interview with Anshuman Karol, Participatory Research in Asia, 8 August 2022.

Some of the literature alluded to the important influence that dominant development paradigms might be having on this range of KT narratives. Some interview participants were concerned that stakeholders in the global North could bias KT concepts and tools. A Learning Journey participant described their concerns with an explosion in the use of multimedia that was often of little use in targeting the behaviours and awareness of local communities, and which excludes them from being co-producers of KT outputs. It is notable that there is a recurrence of certain authors, editors, publishers, funders and commissioning organisations among the sources explicitly using the expression 'knowledge translation'.

Some sources have developed a specialised interest in KT and associated topics, such as academic journals (e.g. *Evidence & Policy: A Journal of Research, Debate and Practice; Implementation Science*), and specific individual authors and institutions (e.g. Knowledge Translation Network (KTNet) Africa; Africa Evidence Network; Consorcio de Investigación Económica y Social, Peru). This results in the valuable production, consolidation and advancement of knowledge on KT through cumulative, in-depth, long-term specialist knowledge, making up a field of expertise on KT. However, as in any field, one encounters a predominance of particular actors. Such configurations could carry the potential risk of groupthink and of particular actors' outsized influence over the study and understanding of KT.

It is not just the question of what KT is and what it is for that creates diverse responses. The question of who delivers it also solicits a broad range of responses depending on political economy and intended outcomes. For those focused on promoting cognitive justice and plural knowledge systems, communities themselves assume the role of KT practitioners (Murunga *et al.* 2020 in Combaz *et al.* 2023). For these advocates of social and political change, KT is about more than just transferring knowledge from researchers to decision makers; it is partly activism on behalf of marginalised communities delivered by political outsiders (Lewis, Rodgers and Woolcock 2022 in Combaz *et al.* 2023). For example, the Evidence Tori Dey case study illustrates how artists and members of the public can play an active role in translating research-based evidence (Siregar *et al.* 2023: 59).

The roles of researchers and research users can also become blurred. In the Intergovernmental Panel on Climate Change (IPCC) case study, scientists themselves carried out KT by working with the tools available, such as research synthesis and academic publications (Siregar *et al.* 2023: 41). KT is also practised by intermediaries inside powerful institutions. Even after researchers and intermediaries have reframed evidence for policy or practice, it must still be brokered by those closest to key decision makers. Mid-level bureaucrats, advisors and practitioners in health or education systems translate it again, and

go through a process of selection, synthesis and reframing (Mijumbi-Deve, Ingabire and Sewankambo 2017).

These multiple forms of knowledge brokerage have been explored in relation to network dynamics by Fernandez and Gould (1994) in their classic description of knowledge broker categories, and further delineated in development studies by Harvey, Lewin and Fisher (2012). These are more complex and less linear understandings of these processes, in which researchers are just one set of stakeholders in a multi-actor and multi-layered system of KT and evidence-informed decision-making and practice. This more nuanced understanding of KT actors moves us beyond seeking to understand who researchers target with their research, to focus on issues of inclusivity and power. This was reflected in the literature, in the Learning Journey discussions and in key informant interviews by concerns around equity, inclusivity and who is excluded from KT processes.

3.3.3 Gaps between theoretical models of KT and the practice of KT

Models for the interaction between evidence and changes to practice or policy have evolved over the past 40 years in predominantly Northern political science, and science and technology studies literature (Oliver, Lorenc and Innvaer 2014). However, the difficulties we experience in relating these concepts to practice in different contexts are acute. Therefore, to avoid reduplicating efforts, this study started out with a spectrum of modes, from the most basic linear understandings of evidence and policy to increasingly interactive, embedded and complexity-informed theories of change. This was not an attempt to validate these models, which tend to shape understandings of KT in the global South to focus on policy-related outcomes, but to try to test our own and our participants' assumptions about evidence production and use.

Overall, the four modes of KT and associated theories in the framework broadly corresponded with the KT case studies documented in the literature (Combaz *et al.* 2023). Nonetheless, KT actors have multiple alternative or complementary ways to theorise KT and evidence-informed policy and practice. There are those who might place a greater emphasis on social movements and community mobilisation, or on gender and social justice. Grass-roots activism that seeks to mobilise the lived experiences of marginalised people, actively disrupting formal or established knowledge-to-policy systems and challenging their legitimacy, does not sit comfortably within the framework. We found that KT actors have multiple strategies and much of this work is informal in nature. Actors rarely work exclusively on either the supply side or on the demand side; most are framing evidence for specific audiences, even if desired outcomes and pathways are not always explicitly stated or framed around formal policy and practice spaces (*ibid.*). Thus, in practice KT cannot be cleanly separated from other activities involving the production and promotion of evidence:

According to the practitioners we interviewed and the cases we reviewed, knowledge translation is, or should be, part of setting a research agenda, undertaking research itself, engagement with an organisation's primary audiences, communicating or disseminating results and recommendations, seeking and delivering policy advice, and building or strengthening partnerships or coalitions for change. (Siregar *et al.* 2023: 28).

The vocabulary of KT and conceptual understanding of the interactions between science and society may be so deeply influenced by this field's roots in Northern literature and practice, and in the health sciences, that applying these in a study of Southern research quickly becomes problematic. As one respondent explained, this is part of a broader issue with the post-colonial dimensions of development:

I think there's a lot that has been written around decolonizing evidence, decolonising capacity development project, is stemming from the fact that you know, some of the framing, some of the concepts that talk about some of the theories of change is [that] they're more Western.¹⁴

The absence of a narrative that conforms to our cognitive bias and understandings of KT processes, with their emphasis on moving research into policy and practice, does not demonstrate an absence of knowledge for development in the global South. The participants in our study and the Learning Journey demonstrated that most actors are aware that change processes are political, contested and non-linear, but the language of KT and the tools that have been promoted tend to result in a narrative that suggests otherwise. This point is reiterated in a think piece, where the authors argue that:

The global South has cultural, socioeconomic and political factors that shape the way knowledge translation (KT) is developed in its countries. Specifically, Latin America and the Caribbean (LAC) have stories of colonisation that have framed the languages we speak and the way we communicate. (Patino-Lugo *et al.* 2022).

Therefore, even if one broadens the inquiry beyond narrow concepts of KT, to encompass many different forms of change and potential actors, underlying bias towards the anticipated uptake of research evidence and its instrumental use in policy may still be pervasive. This is not a unique challenge for those in the global South. In HICs, a movement towards a 'what works' culture of science and policy has taken root in parallel to more 'complexity-informed' understandings of science and society (Room 2011; Boulton, Allen and Bowman 2015).

¹⁴ Interview with Ronald Munatsi, Zimbabwe Evidence Informed Policy Network, 23 August 2022.

This paradox may be felt even more acutely in some developing country settings, where political upheaval, conflict and inequities of gender, cast and race make engagement with formal policy processes far less attractive than promoting cognitive justice and research advocacy. This social reality of messy, unpredictable and acutely uncertain environments has been made more visible by the Covid-19 pandemic. According to case study research by Ordóñez and Georgalakis (2023), Southern research institutions responded in multiple ways that to some degree conform with our spectrum of KT modes. However, as this study suggests, insider and outsider, linear and highly interactive forms of KT may be combined depending on local context and the political economy of evidence production and use.

3.4 KT practice in the global South

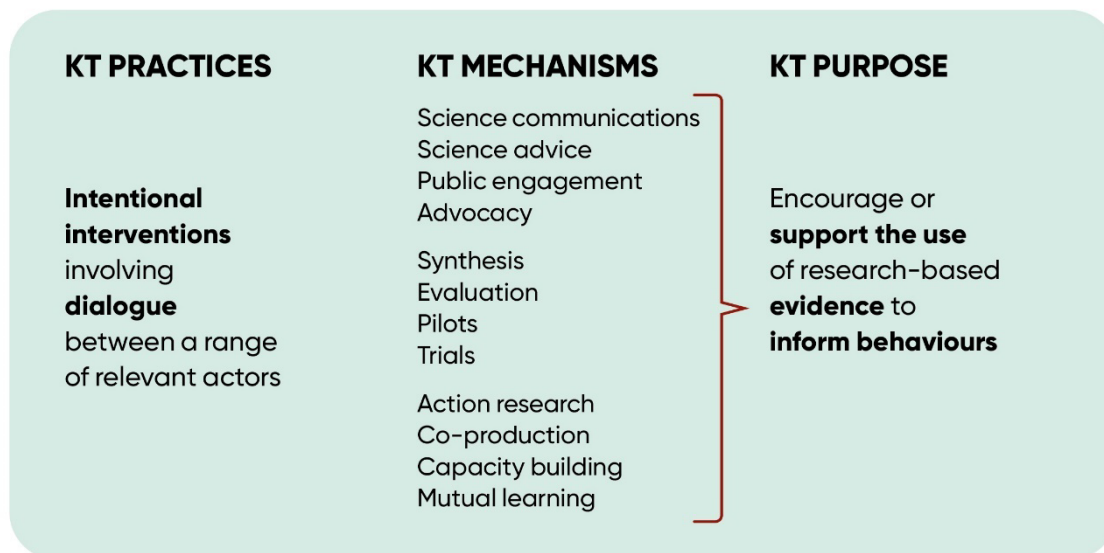
3.4.1 Summary

The literature in the primary research identifies and describes a very broad range of KT practices. Given our expanded definition of KT, we can include here different dimensions of action research with communities, and capacity strengthening, synthesis, evaluation and pilots, and a variety of science communications with wider publics, knowledge exchange and science advice. As set out above, KT is frequently referred to under another label or term, or may be incorporated within research processes and be informal. The broad definition of KT practices, the range of mechanisms and overall intended purpose of KT had implications for our analytical framework, which needed to be developed further.

3.4.2 KT mechanisms in the global South

We can look across the literature review and primary research and provide a typology of KT-related mechanisms that all, in one way or another, seek to bridge different ways of knowing and make sense of problems to influence change. These extend far beyond notions of translation of scientific evidence into less technical language or presentation. Activities may be combined and will be highly tailored to specific contexts. Crucially, they can be indistinguishable from research processes, other than their function or purpose, being linked to the facilitation of evidence use or some other societal or economic outcome. These examples can be explored further by engaging with related content such as the case studies, think pieces and literature (Siregar *et al.* 2023; Combaz *et al.* 2023).

Figure 3.1: Documented KT mechanisms



Source: Authors' own.

Our interviews, case studies, snapshots and think pieces highlighted diverse examples of supply-led KT mechanisms, such as Evidence Tori Dey, demand-driven research, and policy initiatives, such as the Sugary Beverage Tax in South Africa and Evidencia Ministry of Development and Social Inclusion (MIDIS) in Peru. An underlying theme we identified is researchers' interest in targeting the main stakeholders of a change process and the implications this has for the choice of KT mechanism (Siregar *et al.* 2023). The overall purpose of an activity seems to determine the stakeholders and strategy, even in the absence of a clear theory of change. However, it is rare for researchers to undertake KT on their own, and KT mechanisms frequently mobilise multiple types of actors whose different perspectives come into play. In many of the cases we explored, successful KT activities appeared to be those in which researchers who produced the evidence were involved in the translation process without having to be the sole executor.

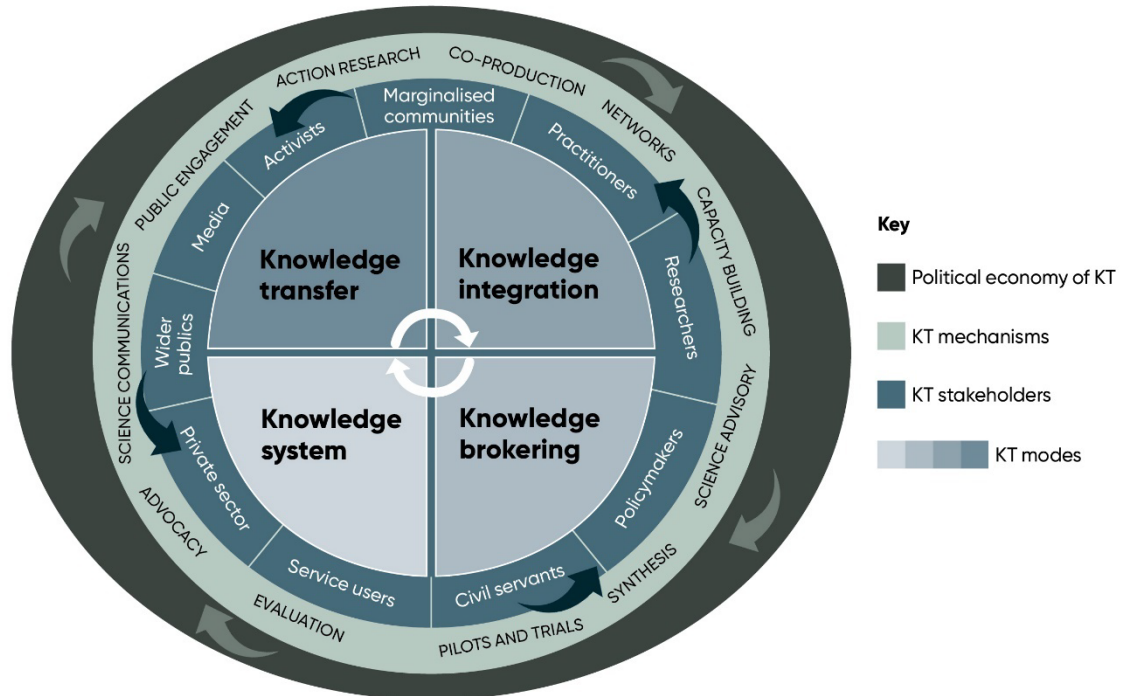
3.4.3 A new analytical framework for KT

The study of KT understandings and mechanisms has enabled us to identify shortcomings in the framework we began with (Figure 2.1). As discussed above, KT is frequently described in terms of activities and sets of stakeholders that relate to an overlapping set of causal processes. It is rare to encounter one process in the complete absence of others, such as supply-driven, project-level KT in the absence of processes that are more interactive. This builds on the application of Harvey's spectrum of overlapping intermediary or brokering functions in sectors including climate and sustainable development (Scodanibbio *et al.* 2021; Harvey *et al.* 2012).

We see corresponding factors or pathways to impact such as: action research involving communities and policy audiences engaging with knowledge hierarchies (knowledge system); attempts to embed research in decision-making (knowledge integration) that brings together policy actors, practitioners and researchers; and wider public engagement designed to raise awareness (knowledge transfer) that uses social media and science communications. These combinations of KT components are shaped by sociocultural and political environments.

We therefore propose an analytical framework (Figure 3.2) that dispenses with a spectrum of increasingly interactive modes of KT and replaces it with an interlocking wheel of KT. This is not dissimilar to the COMM-B Behaviour Change Model (Michie, van Stralen and West 2011), but replaces behaviours with our KT causalities. This allows the investigator and research participants to explore what combination of KT tools, stakeholders and causal processes best describe their experience, and use this to identify and test their assumptions about how change happens in their context. It builds on our observation that in the global South the common denominator across all dimensions and understandings of KT is the explicit or implicit desire to bridge different ways of knowing.

Figure 3.2: KT analytical framework



Knowledge transfer: research project-driven, designed to make knowledge accessible and useful to potential users

Knowledge integration: embedded functions seeking evidence and learning based on priorities of policymakers and practitioners

Knowledge brokering: networks and knowledge intermediaries designed to provide a bridge between researchers, communities and practitioners or policymakers

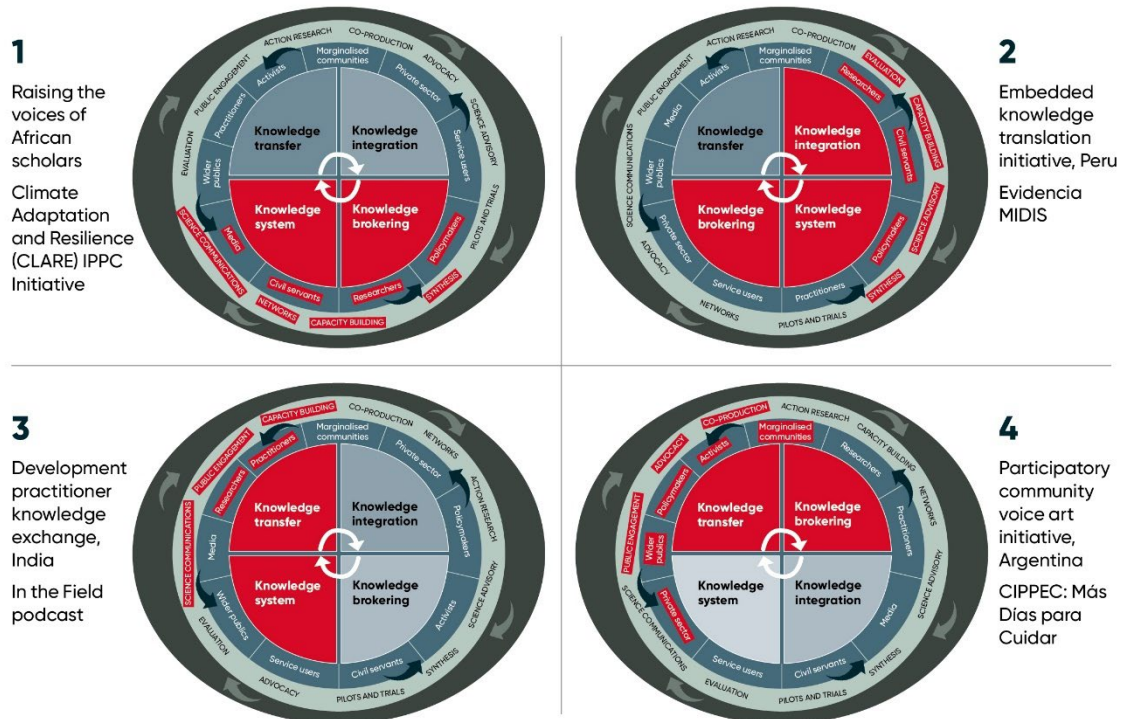
Knowledge system: system-level interventions and infrastructure designed to strengthen capacity for the production and use of knowledge in specific citizen, policy and practitioner spaces

Source: Authors' own.

This framework can be used to explore KT without relying on preconceived ideas about what it is, who does it and for whom. Instead, it helps identify a combination of outputs and stakeholders, then seeks to identify how these relate to the political economy of evidence production and use in particular contexts (outer ring). This might relate to power dynamics, political contestation, resources, excluded groups or donor agendas. Finally, the inner ring prompts us to consider what assumptions are being made about causal processes and how research evidence interacts across these channels and stakeholders, given contextual factors.

We set out here some illustrative examples of how the framework might be used to interpret a range of KT activities, based on some of the case studies used in this research. The final stage would be to add political economy analysis to each of these to identify key factors that shape these pathways to change.

Figure 3.3: KT modalities



Source: Authors' own.

In case 1, we see a predominantly knowledge-brokering model that seeks to connect researchers in the global South with the IPCC, in which the key actors are the researchers themselves, their related networks, and policy practitioners. However, the marginalisation of this Southern knowledge makes engagement with the media and the synthesis of wider bodies of knowledge an important pathway to influencing the dialogue around the IPCC. Therefore, there are elements of capacity strengthening here that are designed to bridge established processes with the perspectives of young African scholars to challenge the existing knowledge system, which favours Northern perspectives.

In case 2, we see a demand-driven embedded initiative by MIDIS that seeks to reshape a knowledge system and broker programme evaluation learning between researchers and policymakers. This is an interactive process that combines different knowledges, rather than simply transferring them between a constituency of producers and users. There is clearly capacity building here, too, with an attempt to create new systems and behaviours that will support the production and utilisation of research evidence.

In case 3, Indian development practitioners use a podcast to directly engage with their peer community. This is an attempt to mobilise their lived experiences and those of their colleagues to inform practice. While the mechanism is largely one of transfer, the wider global engagement with the podcast beyond its originally intended audiences suggests a demand for this knowledge among practitioners

that perhaps relates to a wider discourse concerned with championing practitioners' knowledge.

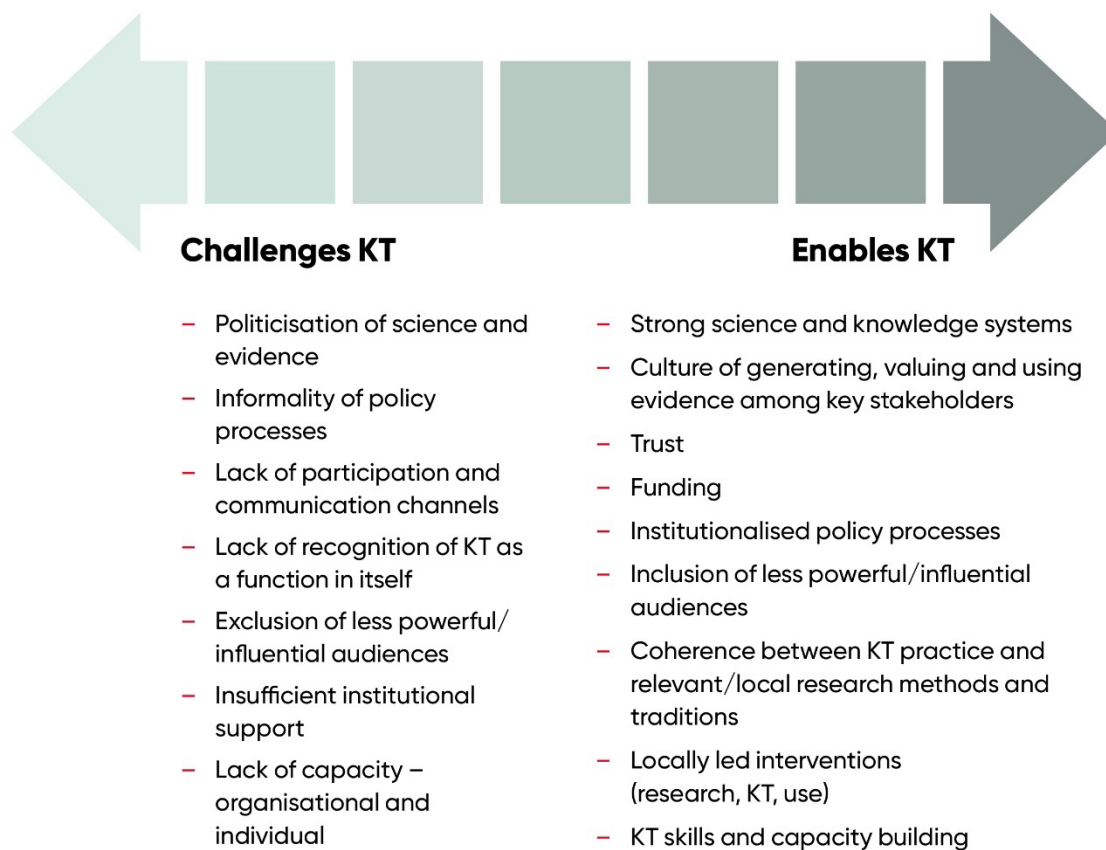
In case 4, the Más Días para Cuidar ('More Days to Care') initiative combined focused policy engagement and advocacy with wider public engagement and awareness raising. A public photography exhibition brought the lived experiences of fathers on paternity leave to the attention of wider publics. The research team transferred knowledge directly to the public via the exhibition and media, while simultaneously engaging with a range of intermediaries and brokering knowledge between public authorities, the private sector and policy actors.

3.5 Challenges for KT in the global South

3.5.1 Summary

General coverage of challenges and enablers relating to KT in the global South in the literature is good but differentiated on the causes, dynamics and effects of both KT itself and the change that KT may aim for. It is likewise good but differentiated on the stakeholders examined, on their natures – individuals or institutions – and types. Through the available literature and engagement with KT actors, we have identified several key factors that shape the impact of research evidence and help determine both opportunities and risks of bringing together research and policy or practice in some LMICs. This has highlighted that we need to be careful not to focus on the differences between North and South at the expense of variations in socio-political contexts. We also found that perhaps the single most common experience of KT, or at least its desired impact, is around building bridges between different ways of knowing, while grappling with system-level inequities that go far beyond just the production and use of research.

Due to differences or inequalities in factors that shape evidence production and use, KT capacity can appear lower in low-income countries than in middle-income and upper-middle-income ones. Nonetheless, KT strategies and tools may not be fundamentally shaped by geography or country income status. The real variance is determined by similarities and differences according to specific socio-political contexts and structural challenges that determine pathways to change and key stakeholder groups. In many contexts, the prevailing KT practices may be informal and organic, and will almost certainly be referred to using different terminology, whereas a great deal of the literature, training and donor-led practices are about formalising and planning, strategising and structuring. This can further diminish our understanding of how best to support evidence-informed change in different contexts.

Figure 3.4: Challenges and enablers of KT

Source: Authors' own. Adapted from Siregar *et al.* (2023). Reproduced with permission.

3.5.2 Building bridges between different ways of knowing

Less well researched but mentioned in the literature is the challenge of building cognitive bridges between different types of knowledge or ways of knowing (de Sousa Santos 2015). This relates to the many forms and levels of brokering that may occur between different knowledge cultures, as suggested by some of our informants.¹⁵ Without intending to validate the present knowledge culture in her region, but rather to highlight this epistemic diversity, one informant made the point how: 'In Latin America, the appropriation of knowledge is social and not evidence based. That is, society learns and appropriates knowledge through repetition and imitation and not through verification.'¹⁶

Despite the prevalence of a vocabulary that sounds like it is imagining research as a commodity that must be moved from producers to users, study participants were fully aware that these are interactive processes in which boundaries

¹⁵ Interview with Carolina Santacruz, International Science Council, 28 July 2022.

¹⁶ *Ibid.*

between knowledge production and knowledge utilisation can become extremely blurred. From the case studies, we can ascertain that a successful KT method may only work when the practitioner understands the context – even when using tools that are assumed to be culturally appropriate. Two cases stood out in particular: Evidence Tori Dey in Cameroon, and the Citizen Voice project in Senegal, Mali and Mauritania (Siregar *et al.* 2023).

Evidence Tori Dey is a form of research uptake that uses storytelling as its primary means of translation. It is an example of a highly contextualised, culturally attuned case of KT aimed at local communities in West Africa, primarily illiterate ones. It is considered a success as its initiators (eBASE Africa) were sensitive towards cultural practices – in particular, storytelling – to facilitate the translation of research findings and reach out to communities affected by poverty, inequality and poor health or education.

Despite narrative analysis being a long-established feature of research-into-policy processes in the global South and global North, the use of arts and cultural products is not a guarantee for effective KT processes. Findings from the Citizen Voice project suggest that the use of arts in communicating environmental issues was more successful when carried out by artists who were well placed in the local hierarchy, and that key messages had to be delivered by elites or individuals who had relationships with powerful groups (Bellwood-Howard *et al.* 2022). A more literal obstacle in doing KT is the matter of language. Reflecting on her own experience in Sri Lanka, Ranwala (2022) suggested how: ‘To effectively reach particular audiences, knowledge needs to be **re-framed** to fit the norms, expectations, and experiences of individual language communities. Language has a significant influence on the way KT takes place in bilingual and multilingual countries.’

3.5.3 KT power asymmetries and excluded groups

We identified some social groups as being excluded from the KT process. These include young people, rural communities, indigenous people, urban poor people, women, and older people. One informant noted that there is a tendency to engage with communities that are more accessible, such as those with basic education, rather than with chronically poor people:

*The chronically poor [are excluded] because, even when people are actually doing community engagement, there is still a tendency to go to communities that you can access, communities that might already have some level of basic education.*¹⁷

¹⁷ Interview with Nick Perkins, International Science Council, 28 July 2022.

You have to make a point to [listen to] these kinds of citizens [the poor, children, the elderly] that would be hard to [reach]. This takes a lot of money. Technology [is] not usually a friend. You need to be in places, and in a country as big as Brazil, you need to be in all regions. (Ibid.)

The informants also noted that KT processes tended to exclude final users and stressed the importance of making evidence accessible and interesting for different audiences. How research is conducted can also be a barrier:

The researchers have done their... literature review; they've understood what the problem is. They have a very strong problem statement. But very rarely will you find that these researchers actually reached out to who they intended to be the final users of the evidence and understand where they will be coming from.¹⁸

Not only socially and politically marginalised people were noted as being frequently absent from KT processes. Some informants also spoke about bureaucrats (as opposed to high-level politicians) and the private sector as relatively underrepresented actors in the KT process. One informant noted that universities in the global South are starting to collaborate with the private sector to put knowledge into use and secure funding:

Universities are now starting to see that... they need to be [putting] knowledge into use. And for that, some universities are collaborating with the private sector now. And this is something that we [IDRC] have encouraged because we said, 'okay, to get money, to get funding from the private sector, you need to make sure that... you let them know what you can do for them, the type of research results that you can have for them.'¹⁹

3.5.4 Research governance and equitable partnerships

The language of equitable research partnerships and co-production needs to be revisited, according to practitioners in the global South. Several respondents struggled to see how KT was being integrated into research processes that are aligned with community priorities.²⁰ Ideally, both the donor community and its local partners should have an equal say in setting agendas and priorities.

These are hotly debated issues that elicited strong views from some respondents. The central issue seems to be around how research agendas are

¹⁸ Interview with Diana Warira, Abdul Latif Jameel Poverty Action Lab, Kenya, 8 August 2022.

¹⁹ Interview with Diakalia Sanogo, IDRC Programme Officer, Senegal, 19 August 2022.

²⁰ This was, for example, brought up in interviews with Kirchuffs Atengble, 14 July 2022; and Linda Khumalo, 15 July 2022.

ultimately tied to the issue of resource: 'Because a lot of the research is externally funded, that remains as a fundamental common problem'.²¹ Informants talked about the value of more inclusive deliberation and decision-making on research agendas to reduce the risk of short-termism and donor dependency that can hamper Southern researchers from engaging with their evidence more meaningfully and taking a long view. We encountered multiple concerns around rapidly changing research agendas disrupting much-needed, longer-term research, and creating dependency and fragility among local practitioners.²²

The need to level the playing field for Southern researchers is widely acknowledged, including by some global funding actors themselves:

*I think that there's a huge discrepancy between these institutions and any institution in the global South... There is just, you know, structural difficulty in breaking up this very established system that you know... is to the detriment of the evidence that has been considered right, because there's huge bias towards perspectives from these contexts.*²³

3.5.5 Structural KT challenges

Southern KT practitioners are aware of the structural challenges they face in their respective contexts. Whereas Northern literature argues that knowledge professionals and researchers have, over the past three decades, moved from linear models to interactive ones and finally to system-level understandings of how change happens, there is widespread recognition in low-income countries that barriers to KT have always largely been understood as systemic (Hertz *et al.* 2020).

Closed political systems, the legacy of empire, patronage, lack of political accountability, under-developed research infrastructure, public policy institutions and systematic exclusion of marginalised perspectives are understood to be far more important than the lack of capacity of individual research teams or lack of KT tools (Stewart *et al.* 2022 in Combaz *et al.* 2023; Langer and Weyrauch 2020). It is not therefore so much a case of weak KT practices in research, but of structural challenges. As one participant put it: 'Sometimes the problems you grapple with in the global South, some people don't find them in the global North because these structures are well established and places are well funded'.²⁴

In this arena, regional differences and local contexts shape approaches to and attitudes towards KT, as one informant brought up:

²¹ Interview with Fred Carden, knowledge to policy researcher, 7 July 2022.

²² Interview with Linda Khumalo, University of the Witwatersrand, Center for Learning on Evaluation and Results, 15 July 2022.

²³ Interview with Marcel Hadeed, Robert Bosch Stiftung, 1 August 2022.

²⁴ Interview with Rose Oronje, African Institute for Development Policy, 8 August 2022.

So, my other issue with when you say, knowledge, translation and the global south is so broad, like even if I just look at Africa on its own, the kind of challenges that we have, when we talk about evidence, there's an issue of resources'.²⁵

In key informant interviews and case studies, these localised and regional structural challenges were expressed in terms of a series of barriers to KT operating at macro- and meso-levels – affecting all actors across society and all institutions in the policy research ecosystem. Interestingly, the funders we engaged with were more focused on the meso- and micro-levels of individual and institutional capacities.

At the macro-level, respondents frequently identified informality in policymaking processes as a key barrier to the uptake of evidence. This informality is often reflected in the absence of formally constituted scientific advisory systems or structures that may draw on multiple sources of evidence. According to one informant, governments in their region tend to favour research projects that they have commissioned and that they control. This often results in the formation of closed circles composed of trusted individuals, which excludes input from broader civil society actors and development partners. Also highlighted was the politicisation of science and knowledge as a barrier that obstructs the open use of evidence. Additional structural obstacles include inadequate funding and a poor culture of learning and evidence use. There are also concerns around discrimination towards female scientists and researchers.

The interviews, case studies and think pieces also highlight that regional differences play a crucial role in KT. Different regions have unique characteristics that need to be considered when approaching KT. For example, informants discussed the need to address language barriers as a challenge to increasing collaboration among actors:

We are very diverse in the region, in Latin America. There is a communication barrier between Brazil and Spanish-speaking countries. I don't know if it has been due to resistance; it seems to me that it has been due to a lack of effective communication channels. We do not consume the culture of the other, nor do we consume the music of the other, nor the television channels of the other, nor the products of the other, and in terms of knowledge translation, there is a big barrier.²⁶

We used to do... policy training, communication for policy, and we used to do that for Latin America. We used to do that for Africa. We used to do that for the Middle East, and for each of those regions, the dynamics were

²⁵ Interview with Linda Khumalo, University of the Witwatersrand, Center for Learning on Evaluation and Results, 15 July 2022.

²⁶ Interview with Carolina Santacruz, International Science Council, 28 July 2022.

*very different. You know the Latin Americans will take up the scale and really run with it, and you can see it. Africans were open to it... In the Middle East, there was some sort of resistance.*²⁷

We also heard that KT funders themselves may be perceived as contributing to structural barriers to effective KT. There are concerns that when funders intervene in local research agendas without being mindful of the local context, they risk creating imbalances in the local knowledge system. For example, informants talked about how the presence of international organisations taking over specific issues can negatively impact the ability of local actors to engage in a particular sector. This creates a sort of balancing act between meeting the requirements of the local context and satisfying donors' priorities. Informants also highlighted the limited understanding that donors sometimes seem to have of specific research engagement approaches local practitioners use. The overall concern is that this may crowd out opportunities for local actors to shape contextual research agendas.²⁸

3.5.6 Challenges with measuring and evaluating KT

The monitoring and evaluation of research impact is a large and complex topic. There has been much contestation around the development and use of theories of change and their application to research interventions. We have begun to see a gradual movement towards more inclusive and contextualised approaches to evaluation, but these are often undermined by more instrumental understandings of research uptake and impact (Vogel and Barnett 2023). Our research suggests that it is difficult to measure KT outcomes, stemming from a lack of standard indicators and differences between concepts and labels. Context also matters, with indicators ideally locally driven, flexible and focused on usefulness. Most informants found it challenging to evaluate KT outcomes. Although they agreed that evaluating the outcomes of KT-related activities was useful, they acknowledged that the basis for determining success is uncertain and constantly changing. Researchers from the global South told us that they are eager to develop their own theories of change, which could result in more context-sensitive project design and, ultimately, more accurate and tangible success indicators.

These challenges may relate to the relative complexity of pathways to impact or causal processes that research projects identify, often nested within a broader theory of change. Clark, Carpenter and Taylor (2023, forthcoming) mapped examples of these pathways for a sample of IDRC-funded projects. Through a process of outcome harvesting, they found significant variations in the linkages between research activity, and changes in their more immediate sphere of

²⁷ Interview with Sherine Ghoneim, Economic Research Forum, 10 August 2022.

²⁸ Interview with Linda Khumalo, University of the Witwatersrand, Center for Learning on Evaluation and Results, 15 July 2022.

influence and wider changes in the state. These range from influencing understandings and awareness to empowering communities, building networks and relationships, and directly or indirectly informing practice or policy. Interview informants and the case studies identified a range of KT outcome indicators at macro-, meso- and micro-levels that included use of evidence in decision-making, new partnerships and networks, and increased capacity of researchers and research intermediaries (Siregar *et al.* 2023). This is closely linked to the modes of KT set out in our revised analytical framework (Figure 3.2), as they represent different dimensions of change or causal processes. This demonstrates how the evaluation of KT is inseparable from different understandings of how KT will contribute to change in very specific contexts.

One informant specifically stressed the importance of incorporating ‘culture’ (understood here as institutional or social context) as a crucial variable in measuring the outcome of KT activities. This means considering culture while designing KT initiatives tailored to specific audiences and incorporating culturally sensitive indicators in institutional change frameworks (for instance, working with indigenous leaders instead of focusing solely on lobbying policymakers): ‘They [*funders*] need to understand the context. The difficulties, their reasons for which they need to adjust their own indicators, metrics to accommodate some of these contextual challenges that we are faced with here.’²⁹

²⁹ Interview with Kirchuffs Atemble, PACKS Africa, 14 July 2022.

4. Implications for research funder support to KT in the global South

The real challenge for knowledge translation in the global South is not one of translation at all but of equitable co-production and sensemaking.

4.1 Overview

We set out here how the research team and Learning Journey participants have interpreted and used the learning from this research to develop a better understanding of KT in the global South and implications for research funders. The diverse understandings of KT we have documented, politics of evidence production and use in contrasting settings, and need for locally driven, context-specific interventions recommends several strategies to more effectively support KT in the global South. Some of these may require fundamental shifts in thinking and action, while others are relatively quick fixes. In both cases, there are promising moves towards more equitable forms of knowledge mobilisation that focus on broader knowledge systems that can be built upon.

Further empowering national actors, system-level interventions and further investigation of evidence-informed policy and practice in particular contexts can all help drive forward a global agenda that will take the concepts and practice of KT to the next level. KT should be integral to setting a research agenda, and part of the research delivery and learning. The key message emerging from this study is that the real challenge for KT in the global South is not one of translation at all, but of equitable co-production and sensemaking.

4.2 KT is narrowly defined and led by the global North

Concepts of KT, knowledge management and knowledge mobilisation appear to have remained oriented towards the priorities and perspectives of the large aid donors and actors in the global North that have historically supported this field's application in the global South. This agenda has resulted in a sense of disempowerment for many Southern researchers. Case studies in the literature, key informant interviews and think pieces suggest a strong desire among Southern researchers and knowledge intermediaries to shape their own KT approaches and strategies, informed by their own understandings of desirable outcomes and pathways to change. Where they often desire support is around the promotion of a more enabling environment in which different ways of knowing are valued equally, and research and knowledge systems are enhanced at

national and subregional levels. They seek to influence not just how specific studies are communicated and influence behaviours, which is important, but also how research is generated and engaged with more broadly.

Focusing narrowly on specific KT mechanisms or practices may miss the bigger picture, in which broader sociocultural and political factors shape KT practices but may also limit their impact. These differences in emphasis on audiences vs a wider group of stakeholders, some of whom may be excluded from KT processes, seem to be linked with understandings of KT itself. Training researchers to engage with the media will have limited impact if free media are absent. Supporting researchers to synthesise knowledge and publish knowledge products may only have short-term benefits if they do not have access to knowledge platforms or open access publishing. One cannot place all the emphasis on written outputs when most influencing is informal and takes place through verbal channels, and access to decision makers is strictly controlled. This is why certain KT notions (e.g. knowledge to policy, policy engagement, research valorisation, etc.), which donor-driven agendas often promote, are occasionally met with a degree of cynicism as they do not fit with the existing social reality.

4.3 KT challenges and enablers are not unique to the global South

An underlying current of dissatisfaction or concern about KT is not a unique feature of the global South. The research impact agenda has swept across Europe and North America over the past two decades, eliciting considerable resistance from academics. For those scholars based in universities, this agenda and all the associated trainings, research excellence frameworks, impact case studies and impact indicators have created significant concerns (Colley 2014; Smith *et al.* 2020). Therefore, we need to resolve conflicts between academic scholarship and applied learning for social or economic impact, on the one hand, and contestations that arise around the perceived imposition of KT agendas that are ill suited to specific socio-political contexts, on the other:

... when attempting to explain the challenges and enablers KT practitioners face in the global South, we should avoid assuming a 'southern exceptionalism'. Rather than a clear boundary between the 'North' or the 'South' we found more nuanced shades in the relative development and strength of informal and formal institutions and organisational settings that affect KT practice and their outcomes. (Siregar *et al.* 2023: 20–21)

Many dimensions of KT challenges and opportunities are not uniquely shaped by hemispheres. Opportunities exist to share learning across diverse geographies, while firmly anchoring KT support in particular socio-political environments.

‘Othering’ Southern KT practitioners or Southern exceptionalism may only deepen inequalities and cognitive bias.

4.4 Local and national actors must shape their own KT strategies

The language of equitable research partnerships and co-production is sometimes found to be largely rhetorical by researchers in the global South. Some respondents struggled to see how KT was being integrated into research processes that are aligned with community priorities. Inclusive deliberation and decision-making on research agendas reduces the risk of short-termism and donor dependency that hamper Southern researchers from engaging with their evidence more meaningfully and with a long view. This was brought up in one of the interviews: ‘It’s sad for me that we have to depend on donors all the time. And if donors change their priorities, you know, like Africa is always on its toes because the donors change their priorities.’³⁰

The need to level the playing field for Southern researchers is widely acknowledged, including by those in the global North. Although the recent movement towards applying principles of equity in North–South research partnerships must be welcomed, in the longer term, decentralisation of research commissioning and leadership, in parallel to global research collaboration and flows of funding, will also be required to transform KT practice. There is still a strong demand for more tailored and practical support for specific projects and research institutions, including training on research communications and engagement, but these measures cannot transform how knowledge is generated and used, or by and for whom.

4.5 A holistic approach to supporting KT is required

The challenge for research donors and researchers is that the emphasis on getting evidence into use does not always deal with broader systemic issues that relate to institutional cultures, cognitive justice and epistemic inequalities; and, ultimately, to social justice. The concepts of knowledge ecosystems that sometimes accompany donor-driven approaches frequently underestimate political and cultural factors, as opposed to technical infrastructure and relationships, which shape dominant research and policy dialogues in particular contexts (Patino-Lugo *et al.* 2022).

³⁰ Interview with Linda Khumalo, University of the Witwatersrand, Center for Learning on Evaluation and Results, 15 July 2022.

Doing KT in the global South is thus as much about bridging different ways of knowing as it is about the tools to deliver knowledge. Given that the challenge of KT is less one of moving research into action and more broadly relates to the political economy of evidence production and use, this study suggests that funders and international partners who take a more holistic approach will enjoy greater success. The models of KT support that some funders have pioneered, which focus on long-term support for networks of thinktanks, appear to provide a far more empowering environment for mutual learning and bottom-up KT strategising and planning.

The same goes for cohort- or programme-level KT support initiatives that focus on whole, diverse networks of research projects focused on similar themes. Examples of this include the work the research team has undertaken separately on other projects, such as providing KT support for IDRC's Covid-19 Responses for Equity programme,³¹ to the United Kingdom's (UK) Foreign, Commonwealth & Development Office (FCDO)-supported Covid Collective³² and the Economic and Social Research Council–FCDO Impact Initiative.³³ Other examples exist of these types of interventions, such as the creation of networks, support for institutional partnerships and collaborations, establishing research initiatives within social movements and embedding interdisciplinary science advice into key government structures (Hertz *et al.* 2020).

For research donors, their entry point is understandably framed around research production and use. This inevitably places an emphasis on getting research into use, and KT mechanisms that can unintentionally reinforce more linear and instrumental concepts of KT that may be poorly suited to particular contexts. In the Learning Journey, there were deep reflections about this challenge and the need for funders to look at KT as part of the research process as a whole, rather than separating it out as a discrete technical area.

4.6 Valuing structural investment in research and KT

Every effort needs to be made to connect research commissioning and capacity support with networks of actors that are embedded in the politics of knowledge. Concrete examples such as Australia's Department of Foreign Affairs and Trade-supported Knowledge Sector Initiative in Indonesia and the FCDO-funded Building Capacity for Research Uptake (BCURE) programme were established with this particular goal in mind, aiming to help establish a knowledge system that brings together competing perspectives on what constitutes 'evidence' and how policymakers should incorporate that evidence in decision-making (Hertz Wulandari and Prasetiamartati 2022; Punton 2016). Relatively simple but

³¹ [Covid-19 Responses for Equity \(CORE\)](#).

³² [Covid Collective](#).

³³ [The Impact Initiative](#).

effective levers for change include support for national research-granting councils, forging closer connections between governments' bilateral research funders and their country missions, or capacity-building initiatives focused on networks of universities or thinktanks. Innovative examples of these approaches already exist and can be built upon, such as the IDRC-funded Science Granting Councils Initiative (Sadeski *et al.* 2023).

For those working in complex political environments on contested issues, the pathway to change may not be the production and mobilisation of new research at all but activism, community action or political engagement.³⁴ Measures to support knowledge systems – which we define here as relationships, networks and institutions through which knowledge flows – can look beyond formal state infrastructures. In politically unstable or rapidly changing environments, an emphasis on epistemic communities, civil society or informal policy networks and social movements may prove far more sustainable.

This potentially extends concepts of KT and research uptake to include outcomes focused on building and strengthening networks, and creating bridges between different epistemologies or ways of knowing. Donors can support this through investments that target knowledge intermediaries, as well as researchers. This idea is also brought forward, for example, by Atengble (2022) in his think piece, which suggests that:

Taking a wider view of ecosystem actors, therefore, helps to identify unique capacity constraints that exist (including those of funders) within the ecosystem. Until we get this puzzle fixed, I suggest that solely targeting a few actors (very often evidence users) will only produce marginal and mostly temporary gains.

4.7 Bridging the gap between scholarship and practice on KT in the global South

Globally, the research field concerned with the theories and practice of KT is highly fragmented, focused on the global North and disproportionately concerned with health (Combaz *et al.* 2023). This literature fails to engage adequately with Southern perspectives on structural power, gender and equity in knowledge systems, and cognitive justice (Narayanaswamy 2017). There is much duplication of effort between sectors and geographies; and while some sectors have reasonably good documentation of their learning, such as in clinical health and education, others remain a 'black box' (Farley-Ripple *et al.* 2020).

³⁴ These challenges are not unique to Southern contexts. In the Learning Journey, we reflected on the Western European and North American failure to mobilise research evidence more effectively during the first wave of Covid-19 that was encapsulated by Northern exceptionalism, weak political will and knowledge hierarchies that favoured the modelling of a pandemic influenza (Cairney 2021).

In this study of the global South, we found a similar picture, with highly uneven documentation of theory and practice. There is an opportunity to address these issues in LMICs, given the current demand for knowledge in this area. Some of the gaps in the literature we have identified could be addressed if researchers who are embedded in the contexts that are being analysed shape and lead the work. This needs to be both applied research that is closely linked to those working directly at the interface between research and policy or practice, and marginalised communities and empirical studies. However, there would be great value in bringing together theory and practice in this field. We need to look beyond the generation of case studies or the evaluation of specific programmes to consider what learning can be shared between sectors and regions.

Given there is little fundamental difference in the broad range of KT mechanisms or tools available between regions, only differences in pathways to change relating to specific contexts, this learning can transcend traditional North–South paradigms. All perspectives on how to develop more inclusive and epistemically just knowledge systems can be treated as equally legitimate and valuable. This can address the false dichotomy of having to choose between the study of KT in the global North or the global South, which has got in the way of much-needed disaggregation of Southern experiences.

5. Recommendations

5.1 Create KT challenge funds and support institutionalisation of KT culture

By empowering researchers and their national and international partners to shape research design from the beginning and to determine their own change objectives, projects can be better supported to make a difference beyond academia. This could include challenge funds, similar to the impact accelerator awards UK research councils provide to academic institutions. These mechanisms allow research teams to shape their own plans for engaging research with policy or practice, and frees them from restrictive project time frames. These funding devices also embed these processes within research institutions that take responsibility for assessing proposals and allocating resources. Meanwhile, investments that improve local demand for research knowledge and diversify the range of actors who participate in these processes, such as strategic partnerships with national research councils, will provide far more sustainable change over the longer term.

5.2 Co-develop culturally appropriate systems for KT monitoring and evaluation

Funders could play a key role by developing and valuing culturally and politically responsive indicators for monitoring and evaluation of and learning from KT. The indicators can be sensitive to the iterative and informal nature of building relationships and trust, and what constitutes success in different contexts. Systems for monitoring and evaluation of KT interventions need to be shaped by the political economy of evidence production and use in particular settings, and informed by inclusive approaches to generating pathways to impact. This offers an alternative approach to the conditions sometimes placed on recipients of research funding that orient monitoring and evaluation around imposed theories of change, and predominantly instrumental outcomes related to policy and practice, irrespective of local context.

5.3 Take a programme-level approach to supporting KT

Funders must take a more structured approach to supporting research systems, creating more space for the co-production of research and change agendas, and ceasing to treat KT in isolation from broader issues and processes relating to equitable research partnerships, social movements, advocacy and governance.

This may in some measure deal with the concerns donors and researchers raised that greater emphasis on demand-driven research commissioning that focuses on relevance and use may squeeze out innovative research inquiries that seek to escape dominant development paradigms or bring in new perspectives and marginalised voices. This could include programme-level knowledge-mobilisation initiatives that combine practical support around research synthesis and uptake with deliberation on pathways to change and the structural barriers to KT in their context led by Southern researchers.

5.4 Strengthen research capacity and facilitate mutual learning

Resources and support for strengthening capacities and learning around KT tools and approaches are important. Knowledge and skills are very unevenly distributed across regions and sectors. Funders can play a key role in facilitating mutual learning between Southern actors. Research funding should incorporate capacity-strengthening costs that cover a range of capabilities, encompassing all modes of KT or causalities, ranging from more traditional research communications to community engagement and advocacy, knowledge brokering and policy influencing. This includes mobilising and supporting the expertise of innovative Southern KT actors who can lead learning and exchange knowledge in this field across sectors and geographies.

5.5 Support multi-actor, multi-level networks to mobilise diverse forms of knowledge

Rather than making choices between supporting the supply side or the demand side of KT, funders should take a more holistic approach to building the capacity of multi-actor networks that have a common interest in solving a particular problem. This can include seeking to influence the influencers around the production and use of evidence that values different types of knowledge. Donors are in a unique position to broker relationships between their country missions and regional offices, Southern researchers and knowledge intermediaries, governments, communities and global policy actors. Rather than supporting KT in isolation and solely in relation to specific research investments, funders can address the broader issues that relate to evidence production and use. This includes providing long-term support for research communities, investing in the next generation of knowledge actors, whether researchers or research intermediaries, and focusing on those who may be excluded from KT processes such as female scholars, indigenous communities or politically marginalised groups.

5.6 Position Southern research for global learning and engagement

Funders can support Southern researchers to make their work more accessible on a global scale. Meaningful investment can connect local knowledge and research to global debates. Supporting Southern researchers to publish internationally and participate in global dialogues is essential for both international science collaboration and more inclusive global policy. Such support can come in the form of support for knowledge hubs, international communities of practice and equitable international partnerships, and promoting Southern leadership in global policy spaces.

5.7 Embrace complexity and risk

KT in the global South takes place in challenging contexts – we are experiencing increased global uncertainty and multiple crises. Encouraging grantees to experiment and test innovative approaches can foster innovation and help grantees step out of their comfort zones. Donors should be willing to learn from failures and celebrate them as learning opportunities, creating a more authentic relationship with grantees. KT actors in the global South understand that change is non-linear, that major disruptions occur that derail research-to-policy-and-practice initiatives and that some successes are down to serendipity. By sharing a more realistic and contextualised understanding of KT, donors and Southern research communities can build more equitable, productive and impactful initiatives together.

5.8 Pioneer new understandings of how to mobilise research evidence in diverse settings

A research agenda exists – and requires further investment – that will produce both conceptual learning and actionable recommendations. However, this research needs to be shaped by researchers and practitioners who are familiar with specific contexts, while donors and global institutions must create spaces for mutual knowledge exchange that transcend disciplines, geographies and sectors. This research agenda, based on the gaps in the literature and the discussions in our Learning Journey, relates to questions around gender and social inclusion in producing and using knowledge, challenging knowledge hierarchies, and conducting political economy analysis that looks at evidence use within a broader context of global and local challenges such as food systems, governance, fiscal policy, health, education, and social policy.

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