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Insights from the Global South for the Revision of the KFPE Guide. Swiss Academies Reports 20 (7)

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This report presents insights from some partnership-experienced scholars from the Global South for the revision of the KFPE Guide. It offers recommendations on content and procedural elements for the revision. Insights for the revision were provided by five selected Global South partners of the wider network of CDE in collaboration with a team of researchers at CDE.

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Insights from the Global South for the Revision of the KFPE Guide

In Memory of John

SDGs: The international UN Sustainable Development Goals

With this report, the Swiss Academy of Sciences contributes to the SDGs 10, 16 and 17:

‘Reduce inequality within and among countries’, ‘Promote peaceful and inclusive societies for sustainable development’ and ‘Strengthen the means of implementation and revitalize the Global Partnership for Sustainable Development’.

THE SDGS ARE TO BE ACHIEVED AROUND THE WORLD, AND BY ALL UN MEMBER STATES, BY 2030. THIS MEANS THAT ALL STATES ARE CALLED UPON EQUALLY TO PLAY THEIR PART IN FINDING SHARED SOLUTIONS TO THE WORLD'S URGENT CHALLENGES. SWITZERLAND IS ALSO REQUIRED TO IMPLEMENT THE GOALS ON A NATIONAL BASIS. IN ADDITION, INCENTIVES ARE TO BE CREATED TO ENCOURAGE NON-GOVERNMENTAL ACTORS TO MAKE AN INCREASINGLY ACTIVE CONTRIBUTION TO SUSTAINABLE DEVELOPMENT.

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Overview and Core-Recommendations

The KFPE is revising its ‘Guide for Transboundary Research Partnerships. 11 Principles and 7 Questions’ also known as the ‘KFPE Guide’. Insights from partnership-experienced scholars from the Global South should play a key role in this revision. We facilitated one such initial and non-conclusive input from scholars from the Global South by asking longstanding partners and collaborators of CDE to review the KFPE Guide and share their experience and feedback. The process involved five scholars from South-East Asia and Eastern Africa. It also included two workshops and individually written reviews of the KFPE Guide by these scholars. Their inputs were finally consolidated in this report. When revising the Guide we recommend considering our overarching reflections (section 2), input and feedback on the individual principles (section 3) and our suggestions for designing the revision process (section 4).

The following **eleven core-recommendations** are extracted from the deliberations in the sections of this report. They deserve to receive special attention in the revision process of the Guide and the individual principles. They clearly indicate that the revised Guide should broaden the perspective beyond the functioning of partnerships to their complex and decisive embedment in structures, contexts, and dynamics.

1. Acknowledge the underlying structural inequalities particularly challenging to North-South partnerships.
2. Address funding structures, the requirements set by funders, and how they en- or disable fair and equitable partnerships.
3. Include considerations on core attitudes like positionality, reflexivity, and flexibility.
4. Integrate the need for contextual awareness and embeddedness.
5. Embed conflict sensitivity and consider its importance for partnerships.
6. Incorporate intersectionality, gender and the principle of ‘leaving no one behind’.
7. Specify key concepts such as ‘fair’ and ‘equal’.
8. Clarify to which type of research partnerships the KFPE Guide applies to and how so.
9. Consider a restructuration of the principles and an integration of the content of the ‘7 Questions’ of the current guide into the principles.
10. Provide supplementary material, tools or practical approaches for implementation, including supplementary material for specific target groups like funders etc.
11. Design an inclusive process for the revision which provides partners from the Global South equal decision power in shaping the final Guide.

1 Insights from some of our longstanding partners in the Global South and their relevance

The KFPE is currently revising its ‘Guide for Transboundary Research Partnerships. 11 Principles and 7 Questions’ – often known as the 11 Principles or the KFPE Guide.¹ We are convinced that partnership-experienced voices from the Global South should play a major role in shaping the revision.^a

The Centre for Development and Environment (CDE) has been selected by the Swiss Commission for Research Partnerships with Developing Countries (KFPE) to conduct a qualitative analysis of its Guide for Transboundary Research Partnerships, because it has the privilege to be connected to many such partnership experienced scholars in the Global South. We therefore set out to coordinate and consolidate, different perspectives from a few of these scholars with whom we have collaborated. This enables them to share their valuable insights and experience for the revision of the KFPE Guide. In doing so, they can provide indications of relevant content to include or reflect upon when revising the KFPE Guide as well as procedural issues they believe should be considered. Within the scope of this project, we were only able to collaborate with and include perspectives and experiences of a few scholars from the Global South. We aim for a purely qualitative input. This means, we explore the KFPE Guide in depth to provide an opportunity to a few partners in the Global South to raise issues and inputs entirely from their perspective. A central element of such research is to allow those affected by the content of the research to define the relevant issues at stake, thereby taking a first step avoiding pre-empting socially constructed categories with their biases, especially represented in contexts, where structurally inherent power differences are likely. We have no claim to be representative of any group, this would need to be addressed by much larger studies with substantial resources. Such larger studies could build on the here presented issues. Therefore, this input from the Global South should be complemented by other inputs or studies.

Aim

In short, we aim to facilitate and generate one input providing some insights from the Global South for the revision of the KFPE Guide.

The target audience

The report is for a specialized public striving for fairer partnerships and for the core group revising the Guide. This is a technical report and therefore, we assume and prerequisite in-depth knowledge of the KFPE Guide and the concepts used within it.

Methods and proceeding

We have constituted a team of five scholars two from Laos, and one each from Myanmar, Ethiopia and Kenya with experiences working in various international partnerships to review the KFPE Guide.^b

These scholars are part of our wider thematic team working on fair, contextually aware and conflict-sensitive research. This team was constituted through a collaborative process, where we first reached out to our partners and connected researchers in the Global South. We then collaboratively decided with all interested scholars, who would take on which role, who would be in a sounding board, who in a special advisory position and who part of the core team. This process was chosen to revert as much current power structures in constituting a team as possible. As resources for this report were limited, the five contributors to this report are the core team members and those in a special advisory role.

These scholars are closely linked to academia but also have experiences in other fields such as international organizations, governments and development cooperation. Four hold PhDs, one is an associate professor, two are project coordinators, one a senior researcher and one is the deputy head of academic affairs division. Most of them have spent considerable time in Switzerland, Germany or the UK. Most importantly, all have international partnership experiences.

We conducted and finalized this project in the year 2024. In spring we started with a workshop, co-designing the review process, and presenting the KFPE Principles and linked documents like the Guidelines to Conflict Sensitive Research.³ Thereafter, the scholars provided written feedback to the KFPE Principles while taking the other documents into account. In a synthesis workshop, we discussed and consolidated the most important points.

^a We have interacted with Microsoft 365 Copilot to improve the style and flow of the text.²

^b When we hereafter refer to ‘the scholars from the Global South’ in the text, we therefore refer to these five contributors.

These steps were undertaken in exchange and collaboration with a team consisting of five partnership-experienced scholars from Switzerland. We the Swiss co-authors of this report were a part of this Global North-South team. Two of us together with the scholar from Myanmar took on the role of coordination and writing this report. The other three mainly participated in the workshops. The entire team of five in Switzerland was a group of researchers, which formed around their longstanding interest in striving for fairer partnerships, contextually aware and conflict-sensitive research and has grown through various collaborations.⁴⁻⁶

After the synthesis workshop, we analyzed the inputs for section 2 and 4 using MaxQDA.⁷ This allowed us, to ensure, that all inputs could be integrated into the report. In section 3 on the single principles, all written comments by the Southern scholars were considered. They were then clustered into the aspects and recommendations on the principles that are presented in section 3. The report, thereafter, received feedback from these scholars, which was again integrated.

Structure of the report

When co-designing the revision process, we defined two revision steps: first, we asked for general and overarching input; second, we asked the five scholars from the Global South to review each principle individually. When analyzing their inputs, we noticed that the overarching themes were also frequently recurring in their review of each principle. Additionally, comments focused on the operationalization of the principles and the process of determining who should be involved and how to revise the KFPE Guide. Consequently, we structured this document accordingly:

Section 2: identifies and describes overarching themes and input and missing elements

Section 3: applies these themes to the KFPE Guide and questions, it also includes more specific comments, which were focused on the single principles

Section 4: Operationalization of the KFPE Guide and the process with whom and how to revise it as well as comments on the format.

2 Cross-cutting insights

The five contributing scholars from the Global South appreciated the KFPE Guide as a timely and relevant document for transboundary research collaborations. They emphasized that the KFPE Guide effectively address many essential characteristics and challenges of such collaborations. For efficiency and brevity, we will from here on focus on areas in the KFPE Guide where they saw potential for improvement and spend little space on all the parts the five scholars considered well-conceived. They however highlighted, that much of the current Guide is precise, captures general challenges well and proposes invaluable guidance for designing ‘fair and equal partnerships’.¹

2.1 What is missing? Suggested additions and points for reflection

In an initial step, we focused on identifying any essential elements that were not yet addressed in the KFPE Guide. We are discussing them in the following subsections.

Acknowledge and address the underpinning structural settings

The scholars from the Global South highlighted that there are numerous deeply rooted and interconnected structural inequalities, which constantly challenge equitable North-South partnerships, for example, access to funding opportunities, access to libraries, databases, ‘high speed’ internet, software licenses, travel visas or time spent acquiring visas, risks when stating an uncomfortable research outcome and many more. While not all factors of these inequalities can be addressed solely through designing the partnerships, it is central to acknowledge these structural inequalities and their influences on partnerships.

Funders

Evidently, it is nonetheless critical to address these inequalities, which can be improved by designing North-South partnerships as fairly and equitably as possible. This requires the efforts of all actors influencing partnerships and not only the directly involved partners. One of these influential actors are funders. The five scholars emphasized that perspectives from the Global South are often barely integrated when designing research calls and defining their themes. Consequently, what is deemed relevant research is influenced and decided by the discourse in the Global North. This negatively impacts partnerships, as the research topic might be chosen or framed in ways that are sufficiently relevant to the specific con-

text in the Global South. Therefore, a principle should address the funding structure and the need for co-design at the pre-research level.

Funding, which includes partners from the Global South, typically focuses on research in the Global South. The scholars observed that it would be highly interesting and balancing to fund transboundary collaborations, conducting research in the Global North too. They pointed to the drawbacks of the Western development model and the value that integrating different perspectives could bring.

Additionally, the scholars pointed out, that the partners in the Global South often do not receive the necessary information about funding opportunities. A better distribution of this information would be essential.

Core attitudes, positionality, reflexivity, and flexibility

Closely related to the above-mentioned theme, the scholars discussed the general attitudes of partners, especially those from the Global North. The underlying assumption that the Global North is the knowledgeable authority, often surfaces in everyday research life and practice.

They emphasized that positionality⁸ is essential. The approach proposes that researchers contemplate, who they are, their privileges or disadvantages, and how this influences their perspective, their interactions, and their research. Reflexivity then adds the layer of how this awareness is integrated into research.⁹ In Global North-South collaborations this approach can challenge the above-mentioned inequalities on an individual and on a research culture level.

The scholars from the Global South stressed the difficulties sometimes arising when flexibility is missing. Rigid plans do not always align with the context. One scholar illustrated this with an example, where researchers flew in, planned to collect the data in two weeks, but were not aware, that getting a research permit might take a month. While this is also a clear example of missing contextual awareness (see section below and [3.2 Setting up partnerships and developing the agenda](#)), the scholar also pointed out, that generally some degree of flexibility is often central to adapt to differences in contexts, unplanned occurrences etc.

Contextual awareness and embeddedness are key

Evidently, contexts matter and differ tremendously: socially, politically, culturally, geographically, etc. The practices, rules, norms, visions etc. people refer to — in

short, their ‘reference systems’ — vary according to the context and contain potential for misunderstandings and conflicts. The contributing scholars from the Global South identified the importance of contextual awareness and embeddedness and the respect for difference as a crucial overarching issue. Partnerships are highly dependent on the context on multiple levels, and local dynamics and partnership dynamics influence the collaboration. Contextual embeddedness and intercultural understanding mean constant mutual learning of all partners, a high awareness for differences, and integrating the contextual knowledge of locally rooted partners in every step of a research project. For example, taking time to build trust with participant communities, between team members and partner institutions is an essential element of each research partnership. Other central elements of contextual awareness are understanding the political process for being allowed to do research (e.g. research permits), knowing what behaviour, wording etc. will have which impact on the local partners and communities and what forms of knowledge dissemination is useful in the context. These elements are also particularly important for ensuring conflict sensitivity (see next section).

Additionally, the scholars from the Global South emphasized that partnerships are a two-way process and the importance of partners from the Global South understanding partners from the Global North should not be understated. In that sense, the contexts of all partners are of importance, it does not matter if they are in the Global South or North.

Conflict sensitivity

The scholars from the Global South stressed that conflict sensitivity is crucial for partnerships. Often, local partners are much more affected if a project is not sufficiently considering its role in local conflicts or tensions. This is true for projects operating in (violent) conflicts or post conflict settings, but can also apply to societal tensions, land conflicts etc. Additionally, conflicts can also erupt or change during an ongoing research endeavor.

Hence the Guide should include the necessity to be prepared for conflicts, to analyze conflicts and the effect a collaboration or project has on these conflicts and how projects have to constantly adapt to evolving conflicts to at least ‘do no harm’.¹⁰ This includes the awareness of the influence a conflict has on the collaboration and how it affects a local partner. Therein, it is also essential that neither participants, team members nor any other involved persons are placed at risk through the research.

The Guidelines to Conflict Sensitive Research³ were highly praised and a link between the KFPE Guide and the guidelines would be useful.

Multidimensional inclusivity and a focus on gender

The scholars from the Global South emphasized that gender, intersectionality and multidimensional discrimination are important issues in their contexts, which are not addressed in the KFPE Guide. They suggest that the idea to leave no one behind, equity between genders, and inclusivity in general, (e.g., of marginalized groups, of persons with disabilities etc.) should be concretely integrated or mainstreamed throughout the document.

Ethical requirements and their influence on partnerships

Additionally, they recommended to closely relate ethical requirements and partnerships. Ethical requirements are a central element of research and on the rise in many disciplines. If research does not adhere to ethical requirements and if these are not adapted to the local context, this will influence the partnership. If it is possible and appropriate projects could also go through an ethics screening provided by an ethics commission at a local University. Regardless of the location, the political independence of the ethics screening is essential.

2.2 To be further detailed in the Guide

Locally relevant research

In the previous section, we highlighted key missing elements that should be considered when revising the KFPE Guide, such as contextual awareness and embeddedness. In this part, we focus on elements, which are already part of the Guide but could be explored and detailed. A fundamental question to consider when conducting research in both the Global North and South is the purpose of the research and for whom it is intended.

The scholars from the Global South highlighted the problem of research extractivism. They referred to Northern researchers flying in, conducting research that advances their career and scientific communities, but failing to generate value for the context. Evidently, these practices must be avoided for numerous reasons. They also constitute a problem for Southern partner institutions, for example when they facilitate contacts to local communities: a local community that never receives feedback after investing time in any type of research activity is unlikely to participate in future research. Therefore, research which benefits the environment in which it is carried out, is crucial (see also section 3.5 Contextual embedment and societal interaction).

However, the research also needs to strike a balance between being locally relevant and contributing to scientific novelty, effectively combining local knowledge with scientific inquiry and methods. In this aspect, the involvement of local stakeholders and beneficiaries is crucial for

identifying their needs and conducting meaningful activities. This involvement will also ensure that achieved outcomes are secured and sustained, maximizing the efficient use of invested financial and non-financial resources.

The five scholars strongly recommend highlighting in the Guide, that it is beneficial for partnerships when funders and the scientific community prioritize demand-driven and locally led projects. These initiatives, supported by scientific evidence and mutual learning, can transform traditional ways of conducting research from a top-down (receiver) to a bottom-up (enabler) perspective. In addition, they promote local leadership in project development, research and decision-making that empowers and fosters a sense of agency among local stakeholders and partners in the Global South and encourages their active participation. This empowerment has become increasingly important in recent years, especially in challenging environments where international support, interventions and operations on the ground are limited, making it essential to conduct meaningful work with limited resources that resonates with local contexts. It also enables more equitable partnerships.

Enabling environment for scholars from the Global South

The scholars from the Global South found that creating an enabling environment for local researchers is crucial for fostering fair, inter-contextual, and intercultural research collaboration between Global North and Global South partners. As highlighted in previous sections, recognizing different forms of knowledge, systems, cultures, contexts, and perspectives is essential. This includes the practical limitations partners from the Global South often face such as communication barriers, access to research infrastructure, support for open-access publications, attending conferences and exchange visits, and software licenses. It is vital for partners to remain aware of these differences and for partners from the Global North, to reduce these practical limitations, which are one manifestation of the above-mentioned underpinning inequalities.

Similarly, the career opportunities of the different partners vary importantly according to their origin. It is crucial to challenge the preset notions and roles and enhance capacities to improve the career opportunities of researchers from the Global South. The scholars from the Global South highlighted that often staff in the Global South is employed for data collection but subsequently has no access to that data and is not integrated into following research steps, which then does not allow for authorship, conference participation or also simply the further acquirement of skills. Accordingly, it is essential to allocate resources to integrate research staff from all partners in all research steps, which are crucial for an

academic career. One scholar for example pointed out that research assistants in their field of research in Global North-South collaborations are never from the Global North, that however this is a role that does often not hold any potential for development, even though it importantly contributes to the data collection (see also section 3.4 [Capacity development and mutual learning](#)).

2.3 Be more specific and clearer on key concepts and target audiences

Define more clearly, to which type of partnership the document applies:

A general question, which arose, was: if this document is specifically targeted at Global North-South partnerships? This seemed implicitly the case for some principles, without being specified. The notion of transboundary is generally applied to different boundaries crossing different socio-political contexts with different research cultures going beyond 'Global North-South' country classification. However, this is not very explicit in the Guide. The scholars found that specifying to whom the Guide applies would be beneficial. They also emphasized that, ideally North-South partnerships could include doing research in the Global North (see also section 2.1 [What is missing? Suggested additions and points for reflection, Funders](#)), which, in their experience, is usually not considered.

Define key terms like 'fair' and 'equal'

A reoccurring element mentioned was, that it would be helpful to define key terms. The most cited examples were notions like 'fair' and 'equal' (see for example first sentence of the Guide). These definitions could include qualitative and quantitative criteria, like specifying what to strive for in the distribution of resources, in terms of pay, conditions set by funders, co-ownership etc.

3 Considerations on and recommendations for individual principles

3.1 Goal and structure of section 3

The overarching issues concerning the KFPE Guide that emerged in consultation with experienced scholars from the Global South are addressed in the previous sections. In this section we present and highlight the considerations on and recommendations for individual principles that were mentioned by them.

We thereby do not follow the given sequence of the 11 Principles but regroup them into five subsections. The reasons for this are twofold:

First, the comments showed that the single principles refer to specific components or phases of partnership-based research endeavours. These components include 1) setting up partnerships and the research endeavour, 2) collaboration in and organisation of research, 3) capacity development and learning, 4) contextual embedment and societal interaction, and finally 5) application and consolidating outcomes. Grouping principles along these five broad components makes it easier to memorise and recall the principles and helps us to better identify clusters of comments by the scholars from the Global South.

Secondly, scholars from the Global South remarked that many of their concerns and practical obstacles to good partnership are addressed in the ‘7 Questions’ accompanying the 11 Principles in the current version. In the consolidating workshop they strongly recommended that the aspects addressed in the 7 Questions are much closer linked to the principles thereby enhancing their quality and applicability. We therefore incorporate the 7 Questions into the following five subsections, without discussing them in detail. Comments and recommendations still primarily focus on the 11 Principles.

The following list provides an overview of the regrouping of the 11 Principles and 7 Questions into the components of a research endeavour and indicates in which subsection they can be found:

→ Setting up partnerships and developing the agenda (see 3.2):

P1: set the agenda together, **Q1:** why work in partnership? **Q2:** how to ensure cohesion?

→ Research collaboration and organisation (see 3.3):

P3: clarify responsibilities; **P7:** share data and networks; **P9:** pool profits and merits;

Q3: what form of collaboration? **Q4:** which foci and priorities?

→ Capacity development and mutual learning (see 3.4)

P5: promote mutual learning; **P6:** enhance capacities; **Q4:** which foci and priorities?

→ Contextual embedment and societal interaction (see 3.5)

P2: interact with stakeholders; **P4:** account to beneficiaries; **P8:** disseminate results; **Q5:** who to involve?

→ Relevance and consolidation of outcomes (see 3.6)

P10: apply results; **P11:** secure outcomes; **Q6:** where to create relevance? **Q7:** when to consolidate outcomes?

3.2 Setting up partnerships and developing the agenda

Reference is made to:

P1: set the agenda together, **Q1:** why work in partnership?

Q2: how to ensure cohesion.

Only one principle aims at the phase of setting up partnerships and developing the agenda of a research endeavour namely **P1** ‘set the agenda together’. Participants from the Global South agree that this is one of the most – if not the most – crucial principle and it deserves highest attention in any partnership-based approach.

Underpinning issues and questions:

However, there is the impression that the current formulation does not yet sufficiently highlight the great obstacles that have to be overcome when setting up partnerships and applying this principle. In fact, the current formulation does not explicitly address pertinent underpinning questions or issues:

1. Why does the envisaged research endeavour require transboundary research partnership and what type of partnership is adequate? While, evidently, not all research requires partnership, certain types of research questions can hardly be addressed without joining forces. In the current Guide the ‘7 Questions’ (**Q1:** why

work in partnership?) address this fundamental issue, however the principles should also explicitly address this.

2. What are the interests, motivations, goals, expectations, obstacles, frame conditions, reference systems, etc. of the different partners and their respective institutions to participate in a partnership-based research endeavour? These aspects are at least partly addressed in the 7 Question (particularly in **Q2**: how to ensure cohesion?) and their clarification requires building mutual trust, openness and a high degree of critical (self-) reflexivity. This important process should be more explicitly detailed in the reformulation of the KFPE Guide.

A joint and significant clarification of the above two underpinning questions is essential for applying principle 1. Simultaneously, it should be evaluated if these underpinning aspects of partnerships could be formulated in an additional principle, thereby perhaps replacing one of the existing principles so that the trademark of the '11 Principles of KFPE' remains.

Principle 1: set the agenda together

When trying to apply the principle of setting the agenda together the following issues were identified as especially critical. For a new release of the KFPE Guide, it is strongly proposed to give more attention to approaches and practices on how to deal with the following critical issues.

- Broad experiences show that insufficient time and resources in the preparation of a research endeavour grossly hinder inclusive agenda setting. This has grave consequences for partnership relations throughout the whole collaboration. The principle 1 should address concrete options and pathways to deal with these crucial time and resource constraints in the phase of agenda setting.
- The impression prevails that funders of research endeavours have in recent decades increased their influence on the agenda setting through defining themes, topics, questions and expected outcomes. This is especially the case in development-oriented research which has led to a turn to 'commissioned research' with limited potential for partnership-based innovations. As the agenda setting by funders is still largely North-driven, the perspectives by Southern partners tend to be less important, thereby creating an imbalance between Northern and Southern partners within an endeavour from the very beginning (see also section 2.1 What is missing? Suggested additions and points for reflection, Funders).
- The institutional and socio-political embedment, (how much legitimacy, social acceptance etc. they enjoy) and institutional interests often differ significantly between partners from the Global North and the Global South. This results in constraints in terms of time, resources, political sensitivities etc, on the side of the Southern partners, thereby giving an upper hand to the Northern partners in the phase of agenda setting. As capacity and career development are key-interests of most Southern partners (see also section 3.4 Capacity development and mutual learning), its incorporation into the agenda setting process can be an important foundational component for a more balanced partnership (see also section 2.2 To be further detailed in the Guide, Enabling environment for scholars from the Global South).
- The scholars from the Global South strongly advocate that the agenda setting process does not only involve the research partners but also the concerned stakeholders of the research endeavour and that this should be better reflected in principle 1. This does not imply that agenda setting should just follow the stakeholders' interests – with the danger of having the most powerful becoming dominant – but that a good knowledge and understanding of the stakeholder landscape with its diversity of interests and conflicts plays a key-role in agenda setting.
- Closely related to the issues of stakeholder involvement, scholars from the Global South strongly criticize that the importance of contextual knowledge, contextual awareness, as well as political and conflict sensitivity are not dealt with in the current formulation of principle 1. In combination with the inherent imbalance in agenda setting that results from some of the above issues, this enforces generic agenda setting driven by the Northern partners. Giving more weight to contextual and conflict aspect in the agenda setting strengthens the position of South partners and makes research contextually more relevant.

The above critical issues related to principle 1 were here elaborated a bit more extensive because not addressing them has negative implication for the application of all the other principles. They therefore require special attention when reformulating the crucial principle of 'setting the agenda together'.

In sum, the phase of setting up partnerships and developing the agenda within a research endeavour requires the largest adaptation and overhaul when reformulating and modernising the KFPE Guide. First, the crucial principle of setting the agenda together will have to much more explicitly address the above-mentioned significant obsta-

cles and challenges, because handling and overcoming them is the key to the partnership quality throughout the research endeavour. Secondly, it is strongly proposed to add one or two principles in this section that address the reasons for choosing a certain partnership type and the importance of building a culture of understanding, trust and reflexivity. In view of maintaining the trademark of 11 Principles, these important additional principles could be compensated by combining principles in other section and thereby reducing their number (see also [section 3.3 Research collaboration and organisation to 3.6 Relevance and consolidation of outcomes](#)).

3.3 Research collaboration and organisation

Reference is made to:

P3: clarify responsibilities; **P7:** share data and networks;

P9: pool profits and merits;

Q3: what form of collaboration? **Q4:** which foci and priorities?

This section deals with the principles and questions concerning the internal organisation and collaboration within a research endeavour. The contributing scholars from the Global South basically agree with the content of these principles and questions but still raised the following points:

First, it is proposed that the key issues raised in the two questions associated with this internal perspective are incorporated into the principles. In particular, the following aspects deserve explicit mentioning and elaboration:

1. Whereas all partnership-based research endeavours ideally take into account all 11 Principles, the size, complexity and duration of the endeavour has a great influence on the manner and complexity of their application. For example, in a short-term disciplinary project the application of the principles poses much less challenges and obstacles than in a long-term transdisciplinary programme. This is dealt with in the **Q3** on the form of collaboration and its practical implications should be taken up in the principles of this section.
2. Most partnership-based research endeavours aim at high quality research, significant capacity development and concrete impact. It is important to note that these types of goals are principally conflicting in terms of required approaches and in terms of relevant knowledge types (system, target and transformation) – see **Q4** on which foci and priorities. Principles of this section should therefore raise awareness on these fundamental frictions between these goals and they should indicate pathways on how to deal with the trade-offs within a research endeavour.

Besides the proposal to incorporate the above-mentioned key issues, the scholars highlighted the following issues to be more explicitly tackled when reformulating the principles of this section:

Principle 3: clarify responsibilities

Whereas this principle is acknowledged as important and well formulated, the following issues deserve more attention:

- When clarifying roles and responsibilities among partners and members, it should also be clarified which means and especially budgets required to execute which roles, and tasks are allocated to these roles and responsibilities. In short, the two should be directly coupled. Transparency and negotiation in budget and time allocation thereby play a crucial role.
- When negotiating tasks and responsibilities it is also important to explicitly discuss on how to deal with potential failures to meet expectations in any of the tasks or deliverables, as well as with potential conflict of interest on a given task between the individual researcher, the team, and the affiliated institutions.
- From a Southern perspective it is also important to clarify to whom the final decision on responsibilities, budgets, and tasks is assigned. Automatically assigning this to the grant-holder, who often is a Northern partner, grossly reduces the negotiation power of partners from the Global South. To counterbalance this, models must be developed on how mutual final decision-making or even assigning the lead to the partner in the Global South can be reached (e.g. by assigning a right of ‘veto’ to the grant-holder).
- From a Southern perspective it is important that negotiating roles and responsibility and planning, implementing, and monitoring of tasks should not only be oriented on the goals of the research endeavour but should also factor in the interests and goals of the team members and their institutions, especially in terms of career building and capacity development (see also [section 3.4 Capacity development and mutual learning](#)).

Principle 7: share data and networks

From a Southern perspective the ownership of data and results and the exposure to broader international networks are very important. Although the principle is valued positively, it deserves taking the following aspects more explicitly into account:

- It is important that sharing should not be limited to data but should include sharing the tasks of their

evaluation and interpretation, the methodologies applied, as well as the resulting conclusions. Only by sharing the whole sequence from the empirical basis to the results will empower all team members and it is an important component of mutual learning (see also section 3.4 Capacity development and mutual learning).

- It is agreed that the ownership of data ultimately lays with the endeavour and the participating institutions, especially after the endeavour ends. However, in many cases key empirical contributions stem from master, PhD or post-doc studies can lead into a conflict of ownership of data because the originality of data is an important component of attaining a degree. To still be able to share such data within an endeavour, the partners must develop rules to deal with this conflict. It is important that all relevant actors can fairly participate in the process of developing these rules. Such rules may e.g. comprise first publication right or clear data related citations rules or more general data management policies.
- Depending on the themes and the context, data can be politically or socially highly sensitive. Rules and approaches of data-collection, handling, storing and sharing of sensitive data and information deserve highest attention and must be guided by the contextually rooted partners. Neglecting this – which Northern partners often do – is not only putting the research endeavour at risk but can pose a significant danger to the partners in the Global South (see also section 2.1 What is missing? Suggested additions and points for reflection).
- Exposure to transnational or international professional networks as well as to other contexts is a key-requirement and motivation for most Southern researchers to participate in partnership-based endeavours. The Internet, especially online communication tools have increased such exposure and are seen as important. However, respondents underline that the importance and quality of face-to-face contacts and the own experience in other contexts cannot be replaced by the Internet and therefore must be considered in planning and budgeting of the collaborations (see also section 2.2 To be further detailed in the Guide, Enabling environment for scholars from the Global South).

Principle 9: pool profits and merits

The scholars from the Global South view this principle as important but make the following comments to expand its content and to sharpen it in view of their practical experience in partnerships:

- Whereas fair sharing of success, profits and merits are crucial, Southern partners demand that also failures and risks should be shared in the sense of taking joint responsibility and action. Experience shows that Southern partners are less well protected from unforeseen events, such as health risks e.g. in the field, stand a higher risk of reputational damage within their context in case of project failure, and are more exposed to security issues in case a (sensitive) research endeavour faces societal or political hostility. It is therefore important that research endeavours take these risks very serious and follow the advice of the contextually rooted partners to mitigate or minimise them.
- It remains a fact that many Southern partners are at the end of a partnership-based research endeavour left with a feeling of exploitation when their hard work, e.g. in establishing the empirical basis of the research, is presented by Northern partners at international conferences and when the first author on all peer-reviewed publications stems from the North. Southern partners therefore demand that research endeavours encompass training in presentation and publication skills for international contexts, so that Northern and Southern partners can jointly present and publish results and earn merits (see also section 2.2 To be further detailed in the Guide, Enabling environment for scholars from the Global South).
- Both key-aspects raised by Southern partners – sharing risks and enabling partners to fairly share merits – require to be inbuilt in planning and budgeting from the very beginning. It is therefore proposed that this principle is merged with principle 3 on clarifying responsibilities (see above).

In sum, Southern scholars strongly support the principles of this section, but they propose to expand and sharpen their formulation to better reflect the main stumbling blocks and to make them more operational. It is further proposed that the key-aspects addressed in **Q3** and **Q4** on types of research endeavours and on conflicting goals are incorporated into the formulation of the principles of this section. Additionally, it could be considered to merge principle 3 and 9.

3.4 Capacity development and mutual learning

Reference is made to:

P5: promote mutual learning; **P6:** enhance capacities;
Q4: which foci and priorities?

Capacity development, learning, and getting exposure are key motivation factors for most Southern partners – individuals and institutions – to participate in partnership-based researcher endeavours. Therefore, the scholars from the Global South highly acknowledge that these aspects are reflected in the KFPE Guide. However, they note that the difference between the current principles 5 and 6 is vague and that the importance and challenges of formal academic training and related career development within a research endeavour are insufficiently addressed (see also section 2.2 To be further detailed in the Guide).

The important comments and recommendations resulting from these observations are thus summarized for both principles of this section together and coupled with the proposal to merge them or to clearer distinguish between formal capacity development and mutual learning.

Principle 5: promote mutual learning and Principle 6: enhance capacities

When reviewing and reformulating these principles the scholars from the Global South propose to explicitly include the following aspects:

- Research and capacity development go together and enrich each other. This is particularly true when master, PhD or post-doc studies are involved. The empirical evidence gained in these studies often forms a core component of the empirical basis of the overall research. Additionally, experience shows that attaining a formal academic degree within a partnership-based research endeavour is an important component of preserving the outcomes of research after the endeavour ends because the future positions of the graduates may consolidate outcomes in partner institutions, in policy, and in practice. This is important for Northern partners and even more critical for Southern partners and the research context. Hence, the principles should state that formal degree-oriented studies at master, PhD and post doc levels must be inbuilt in any partnership-based research endeavour of medium to large size and length.
- Incorporating formal capacity development and respective career-building at master's and more so at PhD level is highly rewarding for a research endeavour and the securing of its outcomes. However, especially when involving PhD studies the following aspects must be considered: First, as these studies are individually owned and designed their objectives may not fully overlap with those of the endeavour. This implies that profound discussions on conceptual integration, the degree of freedom, the allocation of resources and the duration of studies, the ownership of data, etc. must take place. Secondly, time allocation by PhD researchers to their study and to the overall research endeavour must be well balanced. Experiences e.g. show that if PhD researchers are too broadly involved in all basic goals and all knowledge types of the research endeavour (as outlined in Q4 on priorities and foci) their studies suffer, or the study duration is significantly extended. Thirdly, the endeavour should facilitate training of soft skills (presentations, scientific writing, leadership training, etc) to the PhD researchers and strongly support their external exposure to the international scientific community and to other contexts, e.g. in the North for Southern students.
- The scholars from the Global South strongly support that research endeavours are designed as spaces of mutual learning for all involved partners from the North and the South and for all levels of staff (including e.g. PhDs). However, this requires significant allocation of resources and time, as well as well-planned occasions and events of learning. This means mutual learning must go beyond 'learning on the job' but should include sharing and training of topics and results, methodologies, managerial issues, and soft skills including mastering languages. In the planning for this learning the different levels of staff and competencies should be considered and priorities mutually set.
- Capacity development, training and mutual learning should not be limited to the members of the research endeavour, but should at least include associated academic institutions, e.g. through lectures or field schools, but also through contributing to their infrastructure, assets or methodological capacities with enabling effects beyond the joint endeavour. Furthermore, it should strive to include the broader public of interested stakeholders, beneficiaries, decision-makers, technical personnel in relevant institutions, etc. through a variety of formats such as presentations, discussions, field days, short training courses etc. Broadening the societal reach of mutual learning and capacity development beyond the team members adds quality to the research and paves ways for dissemination and application of the final results.

It is obvious that the above aspects of capacity development and mutual learning, cannot be met by too small and too short-termed partnership-based research endeavours. However, as capacity development, career building and mutual learning are key factors of motivation of most researchers and particularly of those from the Global South, it is pivotal that partners, as well as funders design partnership-based research endeavours large enough and long enough to incorporate formal and informal capacity development and mutual learning.

In sum, the scholars from the Global South strongly support that capacity development and mutual learning are prominently addressed in the research-partnership principles. However, they propose that more emphasis is put on the incorporation of formal academic capacity development, as well as on the scope and reach of mutual learning. This emphasis makes it compulsory that the principles concretely address respective implications for the size, the management approach, the conceptual development, the allocation of time and resources, etc. of a partnership-based research endeavour. It is further suggested that the two principles are either merged or re-structured.

3.5 Contextual embedment and societal interaction

Reference is made to

P2: interact with stakeholders; P4: account to beneficiaries; P8: disseminate results; Q5: who to involve?

The scholars from the Global South deem the principles of this section very crucial. They note that in the field of contextual embedment and societal interaction, frictions and conflicts between the contextually rooted research partners (in most cases the Southern partners) and the external partners can be significant. This is especially evident when insensitive Northern partners dominate a research endeavour. Context and conflict sensitivity is very crucial for the success, the outcome and the dealing with risks, especially when research aims at policy or development contributions. However, the scholars from the Global South clearly remark that these important considerations are not reflected in the current formulation of the principles (overarching themes [see also section 2.1 What is missing? Suggested additions and points for reflection, Contextual awareness and embeddedness, Conflict Sensitivity](#)).

This implies that the three principles of this section could be redesigned and newly formulated when reviewing the KFPE Guide. Nevertheless, the scholars from the Global South commented the current formulation of the principles. These comments are presented and are supplementary to the elaborations in Section 2. As several comments transgress the three principles, they are here presented together in one cluster of remarks:

Principle 2: interact with stakeholders, Principle 4: account to beneficiaries, and Principle 8: disseminate results

The scholars from the Global South agree to the importance of interacting with stakeholders in all phases of research (P2), of being accountable to concerned segments of society (P4), and of communicating and making results

available beyond the traditional lines of scientific publications (P8). They further note that this importance varies with the research questions and themes. However, they made critical comments to the current formulation that are supplementary to the main aspects described in section 2:

→ The current formulation partly follows the traditional logic and jargon of the development community where a (development) product is addressed to beneficiaries while taking the interests of obvious stakeholders into account. However, information and knowledge – the key-outputs of research – are not development products, although they may assist in designing, implementing, and evaluating action. The social addressee of knowledge per se cannot be predefined because only specific packaging and communication of gained knowledge allows for societal targeting (see Q5 on who to involve). Contrary to most other resources, the value of knowledge increases the more it is shared. The same applies for knowledge generation aiming at supporting development: research leads to robust and innovative outcomes when the predominantly system-related research knowledge is combined and integrated with the huge predominantly target- and transformation-oriented knowledge bodies of a broad range of concerned societal segments. Hence the broader and deeper research is interacting with and integrating the wide range of societal knowledge bodies the more gained knowledge can be brought to fruition.

→ Against this background it is obvious that terms such as ‘stakeholders’ and ‘beneficiaries’ are not adequate or even misleading when dealing with societally relevant knowledge generation and sharing. They assume that there are actor categories that have a defined stake and others that clearly benefit in relation to the theme of the research. However, societal and political configurations and dynamics related to any development-oriented research theme are much more complex. Aspects of gender (n.b. contributing Southern scholars clearly remarked that this important dimension is not mentioned one single time in the current formulation of the principles), generational divides, power structures and imbalances, economic disparities, historically rooted and persisting tensions and conflicts, cultural and religious diversities, etc. all can play a role and can influence whether gained knowledge leads to positive, negative or even no outcomes. It is therefore crucial for any societally related research endeavour to develop high contextual awareness and conflict sensitivity and ‘not to leave anyone behind’ ([see also section 2.1 What is missing? Suggested additions and points for reflection](#)). Northern partners, who often intentionally or unintentionally tend to be dominant, must acknowledge

that Southern partners play a pivotal role in contextual embedment and are therefore crucial for the integration of societal knowledge bodies and for the societal outcome of gained knowledge.

- It was also noted that the term ‘dissemination’ is not adequate because it implies that knowledge is first generated and then spread to different audiences who then act upon it. The scholars from the Global South agree that knowledge must reach far beyond the scientific community, but that it must be shared and discussed and confronted with different clusters of societally rooted knowledge of a broad range of societal segments at different scale levels to lead to significant outcomes. This sharing and exchange can take many formats that go far beyond traditional research outputs and policy briefs. However, it is also noted that the different communication channels are not independent of each other and may include risks of societal rejection, e.g. in case sensitive results are carelessly published in a scientific journal without considering how this is perceived by concerned societal segments. Sharing and communicating gained knowledge therefore require careful planning that is based on contextual awareness and sensitivity.
- It is more than obvious that all the above considerations lead to tasks and to a workload that goes far beyond a traditional research endeavour. Being aware of these complex tasks and factoring in adequate resources and time in partnership-based and development-oriented research endeavours from the very beginning is crucial. Furthermore, not all team members should be involved in all types of tasks, e.g. PhD researchers must be protected from dispersing into too many duties. The discussion of roles and task (see also [section 3.3 Research collaboration and organisation](#)) must therefore factor in the workload and challenges of contextual embedment and societal interaction. It may also help to involve intermediary actors as outlined in **Q5** (on who to involve) in an early stage of the endeavour.
- Another important point raised by the scholars from the Global South relates to expectations. In order to get funding, the research endeavour has to exaggerate its uniqueness, innovation and practical relevance. If not carefully moderated these exaggerated expectations spill over to the societal segments research is interacting with. And, because time is a scarce resource for most concerned actors, these expectations increase with the amount of time the actors dedicate to the interaction with the research endeavour which may lead into frustration once work has ended. Cautiously dealing with expectations is therefore an important balan-

cing act of research endeavours that aim at social and development relevance.

In sum, the considerations raised above and more so in section 2 show that in the field of contextual embedment and societal interaction the challenges and potential approaches are more complex and manifold than the current principles imply. This means that the principles in this section should be overhauled and reformulated.

3.6 Relevance and consolidation of outcomes

Reference is made to:

P10: apply results; **P11:** secure outcomes; **Q6:** where to create relevance? **Q7:** when to consolidate outcomes?

For the scholars from the Global South achieving societal relevance and having achievements consolidated beyond the end of a partnership-based research endeavour are important concerns. However, they have an ambiguous attitude to the current formulation of **P10** on applying results, and they seem unsettled on the practical options of **P11** on securing outcomes. They support that in a reformulation of the principles the key-consideration of **Q6** on where to create relevance and of **Q7** on when to consolidate outcomes should be incorporated into **P10** and **P11** respectively.

The following points were raised on the current formulation of the two principles of this section:

Principle 10: apply results

Comments turn around the question what application means in the context of a research endeavour, especially against the background of what was discussed above (see also [section 3.5 Contextual embedment and societal interaction](#)) on the characteristics of knowledge as a product.

- Gained knowledge in terms of facts, understanding of processes, tools, methods, etc. are outputs that only become (applicable) outcomes when they are societally taken-up and transferred into action. This means that the social process of transforming outputs to outcomes (see also **Q6**) is not in the control of the research endeavour. However, through societal interactions and through involving other actors and agencies (see also [section 3.5 Contextual embedment and societal interaction](#)) this social process can be supported. In addition, the same knowledge gained can potentially be applied at different levels and in different contexts, e.g. it can inform national policy and at the same time lead to action in a local context. The conclusion from these considerations is that research endeavours should not turn into (amateurish) implementing agencies but that

they team-up with actors and agencies at various levels to bring innovative knowledge into fruition. Larger and long-term research endeavours can consider performing pilot implementations for testing and if successful hand over to implementing actors and agencies.

- An additional important aspect that speaks against venturing into implementation is the consolidated experience that societally well-rooted and therefore broadly accepted research endeavours can play a very important role in negotiations on conflicts, e.g. around natural resources. Turning to implementation activities in this case will make the endeavour perceived as partisan and therefore jeopardise the acceptance as neutral contributor or moderator of conflicts or socio-political negotiations on planning etc.
- The scholars from the Global South shared their experience that funders from the Global North tend to expect and to pressure for early application and quick outcomes due to their reference system in Northern policy landscapes. However, experience shows that ‘quick fixes’ are in most cases not sustainable and often even counterproductive as they help to erode trust not only in the endeavour itself but in the research and development community at large. In fact, examples of contexts exist in which too many ‘quick fixes’ have led to rejection of any research and development agency.
- Documenting and monitoring of societal up-take and of outcomes are important means to evaluate the applicability of gained knowledge and to identify where more communication efforts (see also section 3.5 Contextual embedment and societal interaction) could be made to increase outcomes. The problem thereby is that many outcomes may occur only after the end of an endeavour and are therefore not captured by inbuilt monitoring. This problem should be tackled in principle 11 on securing outcomes.

Principle 11: secure outcomes

Scholars from the Global South agree that securing outcomes would be crucial but poses major challenges in a research environment that is dominated by somehow erratic and short-term projects. They propose that considerations of Q7 on when to consolidate outcomes should be incorporated into the formulation of this principle and made the following additional comments:

- Research projects should try to negotiate for low-cost extension beyond the end of the main research to further document, monitor and promote up-take and outcomes. Thereby, contextually rooted partners would play a key-role.

→ A research endeavour can put-up communication strategies and structures among the members of the team and related partners that can persist beyond the end of an endeavour thereby laying the base for consolidating and further promoting outcomes. These structures can take various formats such as networks, alliances, ‘coalitions for change’, or alumni among the graduates of an endeavour.

- Scholars from the Global South agree that the main responsibility for consolidating and further promoting research and outcomes lays with the partner institutions of an endeavour. Experiences have shown that outcomes are highest and most sustainable when partner institutions from the North and the South enter a longer-term partnership and bare the common responsibility of joining a chain of single projects into a long-term programme around a complex theme. This requires joint long-term strategic thinking, exchange and flexibly integrating opportunities offered by various funders for single projects into the overall shared strategic programme.

In sum, principle 10 on application of results must be reconsidered against the question of what application means in the context of a research endeavour and perhaps it could be integrated into the principles of section 3.5. Finally, principle 11 is seen as important but should include more practical hints and options on how it could be fulfilled.

4 Operationalizing, refining and inclusively reviewing the Guide

4.1 Operationalization: from principles to practices

While the scholars from the Global South consider the KFPE Guide to be highly important and useful, they also noted the lack of detailed guidance for practical implementation. To operationalize the Guide, it is essential to introduce approaches and tools such as those outlined in the CDE's Guide on 'Striving for Fair and Conflict-Sensitive Research'.⁵

Additionally, participants recommended developing a clear dissemination strategy to ensure the Guide reaches the right audiences, specifying who should access them and through which channels. Funders are an important target audience as they define the setup of calls (see also section 2.1 What is missing? Suggested additions and points for reflection and 3.2 Setting up partnerships and developing the agenda).

Additionally, funding organizations have an important role in supporting the consideration and upholding of the KFPE Guide for the beneficiaries, including through funding conditions, requirements and other forms of support.⁴ Participants recommended that each research partnership project should build an operational plan or strategy of how to implement the Guide. The implementation should then be monitored with indicators that evaluates the quality of research partnerships. By integrating a continuous monitoring, evaluation and learning process into research partnerships, we can foster a sense of mutual understanding, fairness and equity throughout the implementation. In the publication from Lundsgaard-Hansen, 2025⁶ authors report 'must-have' and 'additional' criteria that should be considered when funders evaluate the quality of research partnerships. The scholars from the Global South also argued that funding institutions should adopt these principles as formal requirements, and Southern partners should be aware of them and encourage their Northern counterparts to comply with the KFPE Guide, especially the principles in research collaborations.

They suggested complementing the Guide with supplementary detailed guidance and encouraging partners to develop their own collaborative frameworks. The supplementary material could specifically target different audiences. It would be beneficial to have separate supplementary material targeted to funders, partners in the Global

North and partners in the Global South and possibly even targeted to different types of partnerships.

One scholar illustrated that the Guide and proposed supplementary material could mirror the structure of constitutions and Acts of parliament, where the constitution provides overarching guidelines for governance, the Acts specify operational details. Similarly, the KFPE Guide should serve as the foundation, supported by tailored instruments that guide effective and equitable partnerships.

4.2 Giving partners in the Global South the power to shape the Guide: who and how

Who should be involved in the revision of the Guide?

The importance of including actors from the Global South in the process of revising the KFPE Guide was emphasized by the scholars from the Global South. In that sense a committee which consists of a balanced number of Global North and South experts should be included. It is central that former and present partners from the Global South and other essential partners of Swiss research institutions have equal decision power in shaping the final Guide.

Additionally, key stakeholders in the North and South could be involved through interviews, consultation and online inputs. For details on how to involve these people, see next section.

These stakeholders should come from different decision-making levels (funders, government agencies, development organizations, local partners in the Global South e.g. local research institutes and NGOs Swiss research institutions are collaborating with; but also in terms of positions, project and program coordinators, researchers from Global South and North and research assistants.). The aim would be to collect a wide spectrum of perspectives and particularly create space for those that the Guide aims at to shape the outcome of the revision.

How So?

The proposed approaches are to do interviews and/or focus groups as an important step. The team praised the format and approach of the Guidelines for Conflict Sensitive Research.³ These Guidelines are based on expert interviews with researchers and funding institutions from the Global South and North. Interviews could additionally

serve to include illustrative citations in the final output(s) similar to those in the mentioned Guidelines.

Additionally, we recommend conducting an online survey to understand the stakeholder views and experts from the Global South and North.

The redesigned Guide should as a final step receive feedback and input through consulting key stakeholders.

4.3 Format: how the KFPE Guide could be revised

Link questions and principles more closely

It was generally stated that the questions are highly interesting and interlink well with the principles. However, the questions could be more linked and aligned with the principles (see also section 3.1 Goal and structure of section 3) and the links could be more apparent in the document. The team suggested to at least provide a summary table which also indicates these links.

The questions were seen as a useful approach that could be extended. The questions could be devised into two categories. The questions in the first category should help to check, if the principles are fulfilled. These are overarching questions for reflection and guidance. The questions in the second category, could provide questions by principle and include addressing stumbling blocks and implementation related elements. They could increase the links between the current 7 Questions and the 11 Principles.

Include success stories and challenges

In general, the team thought that the implementation and operationalization of such a Guide is a challenge and was considering how to address this.

As already mentioned, the format of the Guidelines for Conflict Sensitive Research was praised. The interview citations help to make the content more tangible. Such an approach could also be interesting in the 11 Principles.

Throughout the 11 Principles, it would be good to clearly indicate potential common stumbling blocks. Real world success stories and challenges could be highlighted. The example of the Ghanaian-Dutch Health Research for Development Programme (HRDP) described in Kok et al. and illustrated in a table¹¹ was cited as helpful. Such success stories and challenges could be presented for each principle. And it might be very useful to review the success stories and failed cases to better understand the reasons of the respective successes or failures. This could provide

additional helpful elements to operationalize and implement the respective principles.

Add more introductory elements and a summary table

The team from the Global South indicated that a more extensive introduction to the 11 Principles would have been helpful for them to understand the aim and scope of the 11 Principles. The team also suggested adding an index or summary table, which provides a preliminary overview. As mentioned above, this table could additionally link questions and principles.

4.4 Final thoughts

The scholars from the Global South emphasise that the KFPE Guide is relevant for transboundary research collaborations and give many helpful insights to design fair and equitable partnerships. However, they also share the opinion that the current version of the Guide should be revised especially in view of giving more emphasis to the embedment and to structural aspects of research and research partnerships. They hope that the considerations and proposals made in this report will inform the forthcoming process of revision of the Guide will adequately be taken up.

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