Evaluation of the Programme for the Enhancement of Research Information (PERI)

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Key to cover photographs

Stakeholder consultation workshop - Ghana	*Stakeholder consultation workshop - Ghana*
Online resources Rizal Library, Ateneo de Manila University, Philippines	*Rizal Library Staff, Ateneo de Manila University, Philippines*

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Executive Summary

- An evaluation of the International Network for the Availability of Scientific Publications (INASP) Programme for the Enhancement of Research Information (PERI) was undertaken by three staff members of the Centre for International Development and Training, University of Wolverhampton between January and mid March, 2008[1].

- The objectives of this evaluation were to examine the outcomes and potential early impact of PERI activities; the programme's strengths and weaknesses; the effectiveness and efficiency of the PERI programme[2].

- The methodology employed in carrying out the evaluation included desk research, document review, web exploration and reference to complementary initiatives. Visits were made to Bangladesh, Ghana, Nepal, The Philippines and Vietnam. The 3 main partner country visits were selected as representative examples of countries in different stages of the PERI model of progression. On-going consultation with INASP staff occurred throughout the study period.

- This evaluation was set in the context of a strong monitoring and evaluation programme and on-going consultation process conducted by INASP. INASP actively encourages staff and partners to contribute to its ethos of being a learning organisation; this is symbolised by the constant reflection on and writing up of experiences, and the self-aware attitude of staff.

- There are substantial weaknesses in the PERI logframe which made it impossible for the evaluation team to use the indicators to assist in measuring the progress of the programme. Quantitative targets were set very low, and were rapidly outstripped by the success of the 'pilot'; indicators were formulated as traditional implementation-focused quantitative inputs rather than enabling measurement of developmental results; and there was a lack of lack of baseline data to describe the problem or situation before the PERI intervention. INASP have sought to address these constraints in the Log Frame developed for the second phase of the programme.

- The evaluation was limited to the fact that every PERI country operates in quite different circumstances; only visiting four partner countries and one network country meant that it was challenging to make meaningful generalisations which could be applied as lessons across the whole of the programme.

- It proved relatively hard to link PERI's stated long-term desired impact *on poverty reduction* to its purpose in disseminating of scientific information.

- Pre-PERI, only a few affluent libraries could afford to subscribe to selected expensive e-resources but now most public university libraries in PERI countries are subscribing through a network at a much lower price; as a consequence less affluent libraries are now in a position to afford e-resources.

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[1] Philip Dearden, Ella Haruna and Jahan Chowdhury
[2] As stated in the Terms of Reference for the Study drawn up by INASP.

- There was some evidence that PERI has assisted researchers in developing countries to be more productive in the publishing of scholarly papers in peer-reviewed journals.

- It was generally agreed that access to PERI resources supported improved teaching in University settings and lecturers felt that access to e-resources kept their teaching fresh and current.

- There was as sense that researchers feel more confident, less demoralised and more 'on par' with their peers abroad and that PERI activities has built the status and power of libraries/ians within universities as they come to represent the bringer of, or gateway to powerful and extensive new resource sets within their institutions

- Despite INASP's deliberately low profile approach to the branding of PERI there is scope for INASP take a broader advocacy role. Currently INASP may be missing the opportunity to advocate for the importance of research communities on a global scale.

- Currently there is no system in place for INASP to identify and tailor PERI to national strategies such as PRSP nor is the focus on development issues within INASP's work fully explicit, although the INASP team see themselves as a development organisation. However INASP has been among a number of organisations making the connection between development and librarianship, for example through support to IFLA's[3] focus on *the implications of the Millennium Development Goals for libraries worldwide.*

- The 'in' or e-resource delivery component is by far the most visible amongst the PERI suite of 'services'. Despite the 'In' component seemingly being accorded great priority and importance by stakeholders in most of the evaluation partner countries, a holistic approach is deemed more effective and sustainable given the training needs identified. However continued targeted effort is needed to bring to the fore the complimentary components of capacity building and research dissemination in each PERI country.

- Institutions highlighted the need for a common 'PERI platform', allowing the user to search across all subscribed resources at once rather than having to browse each publisher's website.

- There is a risk, given the differentiation in level of service between partner and network countries, of a lack of clarity as regards the 'minimum inputs' a network country is entitled to. The need for guidance emphasised by the embryonic network programme in the Philippines perhaps highlights the continued need to be very transparent about the nature of support PERI can offer to a network country in order to effectively manage expectations.

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[3] International Federation of Library Associations and Institutions http://www.ifla.org/

1. Background

The Programme for the Enhancement of Research Information (PERI) is a programme of the International Network for the Availability of Scientific Publications (INASP).

PERI addresses two problems that severely constrain the ability of researchers, namely that:
- researchers and academics in the poorer developing countries, especially in Africa, are to a large extent isolated from their peers worldwide;

- their limited ability to communicate research results effectively means that the research that is carried out does not have the impact it might.

PERI was therefore created to support capacity building in the research sector in developing and emerging countries through strengthening the production and dissemination of, and access to, information and knowledge utilising new information and communication technologies (ICTs). PERI strengthens research capacities in developing and emerging countries by reinforcing local efforts to produce, disseminate and gain access to scholarly information and knowledge. PERI brings 'global' information to researchers in developing countries; it stimulates and supports the publication and dissemination of in-country research findings, and it provides Information Communication and Technology (ICT) skills training for local researchers, practitioners, librarians and publishers.

PERI is composed of five components, it:
1. Delivers information: ICT-enabled national access to international research findings
2. Disseminates nationally published research/strengthens local publishing: Increased visibility of national research outputs; more viable national publishing
3. Enhances ICT skills: Enhanced skills in using electronic resources and tools
4. Supports country collaboration and networking: Stronger local mechanisms for information resource sharing
5. Research and development: Providing answers to challenges identified in the field

The relevance of the PERI is demonstrated in the following statement from INASP's 'network country' in the Philippines:

> *"We have 413 Higher Education Institutions and 4000 schools of very variable quality. There are huge gaps in this country between those who know how to access library resources and those who do not know – the potential for PERI's role is huge".*

1.1 Partner vs. network countries
PERI supports countries within two different categories:

Partner countries are those that can select from all activities available via PERI, according to their needs. In all partner countries, INASP commits to making appropriate staff capacity and funding available to support all the required components.

Network countries include other eligible countries that can access some resources via INASP's website, and if they have a CC, can also benefit from negotiated free subscriptions to e-resources. INASP commitment is limited to the time and funds required to run the relevant website pages, negotiate for free subs, and liaise with network CCs.

However if network country involvement *adds value to partner countries and/or INASP's wider network*, they may also be involved in:

a) Multi-country or regional initiatives such as research networks, professional associations, JOLs and AuthorAID

b) Training, consultancy, global meetings, regional meetings, advocacy, innovative ICT systems development, peer exchanges, case studies and small grants.

In the last year or so, INASP claims to have worked to strengthen services to non-partner or 'network' countries, in order to make sure that as many countries as possible are aware of

and benefit from the free resources available from the network—training materials, publications, Directory of Free/OA Resources, etc. The INASP criteria for transition from network to partner country are attached in appendix 1.

According to the findings of this evaluation INASP still needs to work on ensuring that the distinction between partner/network countries and the associated services is clearly explained within the website and communications with countries in order to manage expectations.

2.   Objectives

The objectives of this evaluation were to examine:
- the outcomes and potential early impact of activities;
- the programme's strengths and weaknesses;
- the effectiveness and efficiency of the programme.

Specific research questions were posed in the terms of reference as follows:

- Has the programme contributed to the goal of "Improved research and teaching in developing countries that contributes to poverty eradication" If so, in what ways?

- To what extent did the programme achieve its purpose of "Researchers in developing countries get access to up-to-date scholarly information (IN) and the results of their research is more widely used (OUT)"?

- To what extent was the management and implementation of the activities effective and efficient, and did they provide value for money?

2.1   INASP's M&E context
This evaluation was set in the context of a strong monitoring and evaluation programme and on-going consultation process conducted by INASP. PERI country reports are produced yearly by CCs in all partner countries and annual reports are in turn produced by INASP and circulated to donors. INASP consults widely through training evaluation, as well as a concentrated effort to host formal annual stakeholder meetings.

In 2004 after three years of activity a mid-term review was undertaken, with focus not on the *impact* of PERI, but on 5 key areas of relevance, usage, management, sharing and sustainability in order to help identify appropriate priorities and directions for the next phase of the programme. PERI stakeholders such as CCs were members of the evaluation team.

In 2006 a survey of stakeholders who had searched for and downloaded e-training materials was conducted and in 2007 a further general stakeholder consultation was carried out, involving ICT professionals, librarians, national journal editors and researchers. One of the key questions asked participants to identify the most exciting/challenging developments in their field over the next five years and what would help them feel better prepared for these developments.

2.2   The PERI logical framework indicators
There are substantial weaknesses in the PERI logframe which made it impossible for the evaluation team to use the indicators to assist in measuring the progress of the programme. When the Log Frame was designed in 2001, targets for progress were considered ambitious as it was not known whether the models PERI set out to test would work. Therefore quantitative targets were set very low, and were rapidly outstripped by the success of the 'pilot'; for example the purpose level indicator of # journal titles included was exceeded six-fold by 2007. Although the PERI team quickly became aware of the insufficiency of their targets, they were not aware that indicators could be adjusted according to progress.

Mapping of progress against the Log Frame OVIs across the five years of the programme is included in appendix 2.

A further problem lies in the formulation of the indicators themselves - they are all traditional implementation-focused quantitative inputs rather than enabling measurement of developmental results. Although this kind of indicator may demonstrate how effectively the programme is being executed it does not provide understanding of the success or failure of a programme, in the meaningful sense of change being brought about. In the development landscape of today, 'counting' of inputs is not sufficient to measure the impact of change. This is reflected by the fact that the INASP logframe does not provide indicators at goal level or any qualitative or process indicators. A further barrier to effective evaluation using this logframe lies in the lack of baseline data to describe the problem or situation before the PERI intervention.

Finally there is a tendency to over-simplify the identities of the primary stakeholders of the PERI programme by focus on the key beneficiary as 'the researcher' – a category which could include student, lecturer, academic etc. The identification of roles like 'journal editor' hide the complex reality whereby a stakeholder may not classify themselves primarily in that way. The implications of this for PERI is the risk that certain stakeholders (such as students) may be over-looked or 'neatly' categorised into a role with which they do not identify.

INASP fully accepts that the Log Frame could have been better designed from the outset, and should have been updated during the course of the programme. Regardless of the weaknesses in the PERI logframe, as an organisation INASP has pursued a course of active learning from *application* of M&E information to the continuous improvement of strategy and activities.

Moreover INASP have sought to address these constraints in the Log Frame developed for the second phase of the programme. Indicators in the new logframe will be verified by monitoring data that are central to the 'validation processes' of academic activity itself—success in funding applications, article acceptance, thesis completion times and global visibility of national research output.

To conclude, the importance of good quality training in the logical framework approach to assist NGOs to design meaningful indicators of development impact and change, particularly at goal and purpose level, cannot be under-estimated.

3.   Methodology
3.1   Introduction
The methodology employed in carrying out the evaluation included desk research, document review, web exploration, reference to complementary initiatives e.g. HINARI, AGORA, eIFL, and on-going consultation with INASP staff throughout the study period.

3.2   Desk Research
Desk research was conducted across a number of sources of information provided by INASP, including:
- Annual reports 2002-6
- Funding proposals
- Publicity materials
- Mid-term review report 2004
- Stakeholder consultation findings 2007[4]
- Survey on use of training materials downloaded from INASP web-site 2006[5]
- Country stakeholder testimonials

3.3   Interviews and consultation
Consultation with INASP staff comprised of:
- inception meeting with the team; SWOT analysis conducted
- face to face interviews with seven key staff

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[4] &
[5] Note these 2 surveys were only available in form of 'raw data' i.e. not analysed, classified or summarised; which made it difficult to fully incorporate into the evaluation given the time available to the consultants.

- telephone interviews with a further three staff
- a mid-term evaluation presentation and discussion of findings with the PERI team. A list of staff who attended this meeting is presented in Appendix 3.

3.4   Country Visits

Country visits were arranged to three PERI countries (Vietnam, Bangladesh and Ghana) and limited data collection in one other partner programme (Nepal) and one network programme (the Philippines) was undertaken by one of the consultants during the course of other assignments.

The 3 main partner country visits were selected as representative examples of countries in different stages of the PERI model of progression. Initially it was proposed to visit Kenya to observe this very successful PERI partner, however due to political upheaval at the time of the evaluation this became impossible.

The Vietnam country visit took place in January 2008 and included:
- Meeting with 16 stakeholders in Vietnam – SWOT, problem analysis conducted
- Meeting with Coordination Team
- Visit to the Library and Information Centre, VNU
- Visit to the Economic Management Centre and meeting with the librarian and researcher

The Bangladesh country visit took place in January 2008 and included:
- Meeting with 25 stakeholders in Bangladesh – SWOT, problem analysis conducted
- Meeting with Coordination Team
- Visit to ICDBRD

The Ghana country visit took place in February and included:
- Meeting with over 100 stakeholders in Ghana – SWOT conducted
- Meeting with Library Consortium – SWOT conducted
- Visits to University of Ghana, Cape Coast University and Winneba University

The visit to The Philippines took place in March and included a:
- Meeting with Country Coordinator and Chief Librarian
- Focus group conducted at The EU Asia Link Stakeholders Workshop

The visit to Nepal took place in March and included:
- Meetings with several key University Researchers and Teachers
- Meetings with several key development projects/programmes and Government Ministries all of whom could really benefit from PERI

3.4   Country overviews

In order to set the evaluation findings of this report within a useful context and to understand the status and progression of each country within PERI, there is a brief country background for each of the main countries below. Further details for the field visit countries can be found in appendix 4. INASP are working towards a model of country progression which is discussed in section 12, appendix 12 shows this model and the approximate progression of individual partner countries against it.

Ghana
Status: Partner country
Start date: 2002
Ghana was involved in the design and pilot of PERI and became a partner country when the full programme started in 2002. In 2004, an agreement was jointly signed with the Country Coordinating team that agreed a staged progression to self funding between 2004 and 2007 for the aspects of the programme the CC team had selected: Information Delivery, Training, and Country Coordination and Networking.

Notwithstanding this agreement, INASP continued to fund additional stakeholder meetings and training to support the transition to independence, including workshops on '*Working*

Together to Support Research', '*Monitoring and Evaluating Electronic Resources Use*' and '*Licensing and Negotiating Skills*' in 2005 and 2006.

Ghana hosted a peer exchange visit by colleagues from Kenya, to share experiences around consortia development, and was part of the team that lead the 2004 Mid –term review of PERI.

Vietnam
Status: Partner country
Start date: 2004
In 2007, the Library Consortium established under PERI program with more than 50 institutions registered to PERI. The team also works closely with funding agencies to seek financial support to ensure the sustainability of the Consortium. As well as hosting a peer exchange visit for the Country Coordinating team from Nepal, a locally organised workshop were held to guide users in accessing the resources available via PERI and two combined INASP-facilitated workshops on Licensing and Negotiation Skills for librarians. In September 2007, the Vietnam Journal Online (VJOL) website was officially launched.

Bangladesh
Status: Partner country
Start date: 2006
After discussions in 2005 and inception in 2006, colleagues in Bangladesh very quickly built an effective coordinating team, based at the Bangladesh Academy of Sciences in Dhaka. A country visit by INASP staff in May 2006 enabled INASP to deepen its understanding of the country's context and the conduct the joint signing of a Memorandum of Understanding. E-resource subscriptions for 2006 were paid for via funding secured by INASP.

In 2007, the consortium was formed and raised their own funds for subscriptions. An initial training course 'Effective use of e-resources available via PERI' was also run and the Journals Online service—BanglaJOL—was launched in October. In the first few months over 7,500 articles had been downloaded from the site by users from over 90 countries.

Philippines
Status: Network country
Start date: 2007
The Philippines is a network country and has access to certain free resources available from the network—e.g. training materials, publications, Directory of Free/OA Resources, etc. via a country specific web page.

As a Country Coordinator is in place, the Philippines also benefits from some INASP-negotiated free subscriptions to e-resources from Beech Tree Publishing, National Academies Press, Geological Society and University of Chicago Press. INASP's capacity to make these free subscriptions available depends on the specific context of each publisher and their work, or otherwise, in the country/region. Due to a high number of existing subscriptions in the Philippines, most publishers are not willing to negotiate for the deeply discounted subs PERI model.

As the Philippines is considered to be of regional importance INASP has begun work on a Journals Online Service—supporting journals published in the country to increase quality and visibility—with INASP staff due to visit the country to carry out training in 2008.

3.5   Questionnaire
A questionnaire was designed and distributed to main contacts amongst donors, more than 100 journal editors and three international publishers. A copy of the questionnaire is presented in Appendix 6. Twelve questionnaires were returned by local journal editors, one from an international publisher and one from a donor. Further questionnaires were distributed during field visits and completed by key stakeholders[6].

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[6] Copies of all questionnaires are held by Rebecca Priestley, Programme Officer, International Network for the Availability of Scientific Publications (INASP) 60 St Aldates, Oxford OX1 1ST, UK

Due to the recent INASP consultation of researchers and librarians these groups were not consulted again but the findings were incorporated into the evaluation where possible. The small numbers of publishers consulted included a representative sample of stakeholders who had not been included in the recent consultation.

3.6 Timing
Consultancy days were allocated as follows, across the three-person consultancy team: desk review (4 days); design of instruments (2 days); meetings/interviews with INASP team in Oxford (4 days); telephone interviews (1 day); country visits (12 days); writing final report (2 days.) The programme for country visits can be seen in Appendix 4.

3.7 Limitations
The limitations of the evaluation were related to the fact that every PERI country operates in quite different circumstances; only visiting four partner countries and one network country meant that it was challenging to make meaningful generalisations which could be applied as lessons across the whole of the programme. In two of the visit countries language barriers inhibited the collection of data to some extent.

INASP is an extremely self-reflective organisation and there is a wealth of information available in the form of reports, consultation and testimonials. Given the limited time available for the evaluation to be carried out, doing justice to the vast mass of data available was a formidable task.

4. Impact

4.1 Introduction
Has the programme contributed to the goal of "Improved research and teaching in developing countries that contributes to poverty eradication" If so, in what ways?

It proved relatively hard to link PERI's stated long-term desired impact *on poverty reduction* to its purpose in disseminating of scientific information. Whilst it was too early to judge the impact in three of the case study countries visited (Vietnam, Bangladesh and Nepal, all less than 18 months into the implementation of their programmes[7]); in Ghana the programme's apparent impact related purely to access to scholarly information and could not be transmuted to a wider level. As a network country, the programme in the Philippines is engaged with PERI in a less comprehensive way.

The advent of new resource availability in the digital format cannot, in itself, guarantee research and learning, therefore it is hard to prove that access to information necessarily translates into new research practice. Despite a baseline or 'control group' country against which to measure 'improved', PERI's impact on *improved research and teaching in developing countries* can be categorised in the following ways:

4.2 Affordability of resources
Pre-PERI, only a few affluent libraries could afford to subscribe to selected expensive e-resources but now most public university libraries in PERI countries are subscribing through a network at a much lower price; as a consequence less affluent libraries are now in a position to afford e-resources. In Ghana stakeholders stated that they now have a variety of resources to choose from, whereas they used to send to Nigeria or Denmark for articles, a process which would take weeks. Through assisting in the establishment of consortia, PERI has had a major impact on country collaboration and networking between Universities.

4.3 Publishing
There was some evidence that PERI has assisted researchers in developing countries to be more productive in the publishing of scholarly papers in peer-reviewed journals. In Ghana one academic explained that he has published 12 times in 2 years and credited this to journal access. Another lecturer, who submitted a paper and was asked to include more current

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[7] Nepal joined PERI in 2003, Vietnam in 2004 and Bangladesh in 2005, however sustainable programme initiation, (setting up of teams etc in each country etc) takes a long period of time before activities can begin on a wider basis.

articles before it could be published, explained: "With online resources it took a matter of days for me to improve the paper – in the past I would have given up and abandoned the article." Several stakeholders mentioned that access to PERI resources assisted them in obtaining their PhD. Respondents in Bangladesh also believe that access to e-resources will result in increased and improved level of research output from Bangladesh.

4.4   Teaching
It was generally agreed that access to PERI resources supported improved teaching in University settings and lecturers felt that access to e-resources kept their teaching fresh and current. "I can generate key texts at the press of button and give to students instead of waiting for the bookshop." There was also evidence that both post and under-graduate students were familiar with the online resources and used them for self-study and for compiling assignments.

4.5   Confidence and status through information access
In Bangladesh stakeholders reported that a couple of years ago researchers and universities had almost no access to current research journals; now they felt their level of access can be compared to many standard institutional libraries in the developed world. There was as sense that researchers feel more confident, less demoralised and more 'on par' with their peers abroad.

4.6   Opportunities to advocate
Despite INASP's deliberately low profile approach to the branding of PERI there is scope for INASP take a broader advocacy role. Currently INASP may be missing the opportunity to advocate for the importance of research communities on a global scale. As a stakeholder in Ghana emphasised: "Publishers need to be constantly updated on the needs of researchers in developing countries." Although INASP is constantly engaged in this process, for example through dialogue with international publishers, some INASP team members argued that INASP needs more visibility on the wider international stage as a respected voice in the field.

Voices of PERI stakeholders reinforced this view at the consultation in 2006, where suggestions included forming partnerships for an advocacy purpose, for example with IFLA. The report went on to say that:

> *Advocacy was seen as a way of supporting INASP's key communities—whilst not able to provide infrastructure, INASP could advocate and lobby for infrastructure improvements and activities. There was also some discussion on how INASP could act as facilitator/catalyst for lobbying and encourage a unified approach in the information field.*

In order to situate PERI more effectively in its wider environment it was recommended in the Mid-Term Review 2004 that PERI strengthens its links with p olicy makers, in order to work to ensure 'buy-in' and enhance the link between PERI activities and national and institutional research strategies.

4.7   Taking a development perspective
Currently there is no system in place for INASP to identify and tailor PERI to national strategies such as PRSP[8] nor is the focus on development issues within INASP's work fully explicit, although the INASP team see themselves as a development organisation. However INASP has been among a number of organisations making the connection between development and librarianship, for example through support to IFLA's[9] focus on *the implications of the Millennium Development Goals for libraries worldwide*.

INASP designed and facilitated the IFLA Africa Sections workshop "African Libraries of the Future: Interfacing with the Millennium Development Goals" and is in the process of designing a 'next steps' proposal. The meeting was attended by 66 library leaders including University

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[8] Poverty Reduction Strategic Plan
[9] International Federation of Library Associations and Institutions http://www.ifla.org/

Library Directors, Presidents of Library Associations and Directors of National Libraries. Out of the workshop a vision was identified, that:

> *Our dynamic African libraries inspire and empower the communities they serve by providing egalitarian access to global and indigenous information and knowledge.*

Suggested actions that emerged from the workshop included capacity building, networking and financial investment. Non-African stakeholder institutions in PERI participant countries are also considering their role in the development agenda, as evidenced by box 1 below.

Box 1: The role of Higher Education Institutions (HEIs) in the Philippines in relation to the Millennium Development Goals (MDGs)

As impact to poverty reduction Higher Education Institutions shall supply, through their Human Resource Development function, competent basic service providers such as teachers, health workers and social workers to the needs of the whole population. HEIs in the Philippines can:
- Help with the exchange of ideas
- Enhance teaching and the learning experiences of students
- Build our credibility in an international community

Of course they can only do this if they have easy access to the latest research and developments. The internet is vital but on-line journals are critically important if HEIs are to delver what is required.

Workshop Participant at the EU Asia Link Stakeholders Workshop 21 February 2007

5. 'IN'

To what extent did the programme achieve its purpose of "Researchers in developing countries get access to up-to-date scholarly information (IN)…

5.1 "IN" or e- resource delivery

The 'in' or e-resource delivery component is by far the most visible amongst the PERI suite of 'services':

> *The access to journals is what PERI stands for in Bangladesh by a wide margin*

> *PERI is e-resources – all other things are dead* (Ghana)

> *Journals are the strongest part of programme, we can't say much about other components* (Ghana)

The 2007 INASP annual report shows that over 29,000 abstracted peer reviewed journals—of which over 17,500 are full-text—were made available to researchers in developing and emerging countries (see appendix 7 for full list of titles). In Bangladesh for example it was estimated that 80% of the research community have discovered the resources. In total PERI offers resources from 46 publishers/aggregators and includes over 11,000 full text books and 69 databases. The benefits of this are outlined by a Nepalese researcher:

> *PERI has been one of the important resources for accessing articles, journals in Nepal. I have downloaded lots of essential reference literature using PERI program. Now without PERI, I can't imagine how I would complete any of my research work. I'm much benefited through PERI, because I have accessed lots of literature for my personal research work.*

There is also positive feedback regarding communication from the international publishers perspective:

INASP has done a great deal to reduce the communication barrier between individual countries and publishers… Our primary reason for working with INASP is to better support countries that wish to have single line of communication channel… We are able to reduce the complicated transaction procedure that may be involved in individual countries by coordinating with INASP.

However not every publisher INASP works with is able to make their resources available in every PERI partner country, for a number of reasons:

a) some publishers work with INASP as a pilot in order to explore how their sales activities can be managed and work in tandem with INASP's philanthropic aims;
b) some publishers work with INASP as a facilitator/enabler for other philanthropic work they are doing, for example JSTOR who work with INASP as part of their OpenAfrica Initiative;
c) some publishers already have direct sales arrangements in place with institutions/consortia in a country which they feel can be grown by themselves;
d) some publishers already have exclusive arrangements with an agent in place (this is often country-wide/continent-wide) and legally binding for a set-term.

There is an on-going debate within the PERI team as regards the interests of publisher vs. beneficiary, with some staff concerned whether there is "too much emphasis on commercial interests, we should not be exploring the markets for western publishers." However given the complexity of the context as described above, there is also the reverse potential for some publishers to perceive that INASP is 'suppressing' their potential markets rather than proposing a realistic price for the context.

Connected to this there is debate to be had regarding the strength and balance of the relative components and the varying extent of the 'PERI package' experienced within different partner countries. In terms of the evaluation findings, this argument was to some extent reflected in the Ghana context. Aside from putting the negotiating relationship with publishers in place, PERI is not perceived as a continuing programme in Ghana, rather stakeholders were surprised and confused that an evaluation was taking place on a programme that had already 'ended'. This highlights the risk that other PERI components become victims to the success of the provision of information programme strand.

Despite the 'In' component seemingly being accorded great priority and importance by stakeholders in most of the evaluation partner countries, all the evidence would seem to conflict with the ideas of a single dominant component being implemented successfully. A holistic approach is deemed more effective and sustainable given the training needs identified throughout this report, with continued targeted effort needed to bring to the fore the complimentary components of capacity building and research dissemination in each PERI country.

Most significantly the evidence of this evaluation leads towards confirmation that a low level input (i.e. licensing inputs without associated support from other components), is not the best way forward for the programme. The success of the information delivery component is based on a sincere and felt need in developing countries for access to information, as demonstrated in the strengths of this component listed below. However the demand and need for capacity enhancement is also clearly evidenced in the weaknesses of this component detailed below.

SWOT analysis was conducted in the 3 case study countries and the results are included in appendix 8, summarising the strengths, weaknesses, opportunities and threats of PERI in each country. Much of the SWOT analysis centred on the 'in' component and so some key strengths and weaknesses of this component are highlighted below.

5.2   Strengths

Stakeholders strongly indicated their appreciation for the provision of easy access to the most current research data and this was clearly attributed to the PERI programme.

> *There is no way we could have received such breadth of information at such a low price, if it wasn't for PERI* – Vietnam

> *Without PERI we wouldn't have access to the 2% that we are paying* - Ghana

It was acknowledged in most institutions that before PERI there was no access to online journals at all. The importance of the resource itself was widely acknowledged:

> *Excellent tool for literature review*

> *If you are not aware than you are missing out*

> *You don't need to go to distant libraries to access literature, even from here we can do a decent literature search*

> *Access to peer-reviewed journals that we don't have elsewhere eases the anxiety of having to access up-to-date information*

There was a sense that PERI activities has built the status and power of libraries/ians within universities as they come to represent the bringer of, or gateway to powerful and extensive new resource sets within their institutions. Moreover it was confirmed that e-resource users are not limited to lecturers, academics and researchers. For example in Ghana it was estimated that up to 90% of post-graduate students could know about the PERI resources[10].

The example below indicates how researchers are also accessing resources through foreign universities; and the value they placed upon this. There is scope for INASP to advocate for all European Universities to offer on line services to their Alumni, however the country ownership model through which PERI works does not support this initiative.

Box 2: Access to On Line Journals.

"Having studied at Manchester University on an *Erasmus mundus* scholarship I returned to the Philippines to complete my dissertation. I was allowed to have on line access to all the journals I needed through Manchester. This was really useful and simply superb… "

PERI Evaluation Stakeholder Workshop Participant , Project Associate in Practice Areas of International Economic Law, Philippines

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5.3   Weaknesses

Quality/content
Institutions highlighted the need for a common 'PERI platform', allowing the user to search across all subscribed resources at once rather than having to browse each publisher's website. The lack of this search tool meant 'PERI' resources were not considered user-friendly; however this perception is based on a slight misunderstanding of roles by stakeholders. In other words resources are provided *via* PERI but they are 'owned' by each participating library and it the responsibility for web authoring would fall to national or institutional level.

There was also a perception that specific high quality journals cannot be found within the PERI ranks: "The ones you really need and are very useful you won't find them." There was a variety of disciplines that felt under-served by PERI with a general agreement that the Arts

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[10] Estimates ranged from 10% to 90%

(linguistics, literature, drama, classics, philosophy, modern languages, religion) were most lacking. It could be that PERI needs to substantiate exactly why certain journals are not represented within the package i.e. that these publishers are not willing to negotiate on their prices.

In Ghana there was some serious concerns regarding the whole PERI system where one lecturer reported that: "Almost all my efforts to read material online are interrupted by blocks inherent in the internal system". She went on to use the example of Blackwells & Cambridge resources to explain her point:

> *They are basically sophisticated marketing devices which give academics an opportunity to read advertising about journals, not the articles in journals. They are in fact a pretence or proxy for real journals. Yet these are circulated within the faculty as new online facilities for researchers. Real databases that would help us to compete internationally within our respective fields, to pick two which I am repeatedly invited through searches but unable to access are MUSE and Athens scholar. Some efforts to use the very big databases accessible through PERI never reached any article in itself just endless links to other bibliographies and lists of related articles. Proxy databases or those which amass data over many fields in an effort to draw reader's attention to online marketing tactics of publishers waste time and frustrate students and faculty.*

In fact all Blackwells and Cambridge resources are available via PERI in full text, providing the country has selected that resource and that the institution has registered to use them. This strongly felt concern therefore highlights a need for awareness raising as to origin of PERI databases and/or training to enable improved use of databases, and draws attention to the challenges posed in this arena. Significantly the librarian to whom the comments above were addressed saw this as an INASP issue, rather than something that the library itself could address. In turn INASP see their role as to build these basic research skills and to *support* the libraries to present their resources effectively.

However there is an on-going sense from both stakeholders and some members of the PERI team that the focus on user perspective needs to be increasingly honed:

> *PERI is like a jungle of publishers, users can't navigate it*

PERI users do struggle with the lack of descriptors in terms of the nature and purpose of specific references. For instance, in Vietnam PERI resources display in a single column with bullet points but with no signposting as to the source. There was a felt need among stakeholders to categorize journals and periodicals in a manner that is comprehensible and easy to access from a variety of subject disciplines. An explanatory statement for each of the journals would assist users to navigate, lessen the burden on the potential users and ease the process of referencing.

One of the recommendations from the 2004 mid-term review was to investigate whether developing subject-navigation would meet more needs and improve use of PERI resources. It was finally agreed in a follow-up document that INASP should not provide such a listing as this ought to be done by librarians in each country, to facilitate them to truly understand the content available. Alternatively it was proposed to mobilise a group of CCs to come up with such a listing and it was mentioned that Pakistan had already done this and have offered it to the PERI community, should INASP wish to capitalise on the opportunity.

It is also considered by some staff that PERI should tailor its project design more towards the interest of the user, guiding the user to the information in a more supportive way and "to protect our users from the commercial jungle".

5.4   Resource limitations

Even with the acknowledged 'massive discount', some countries were struggling with the finances of PERI. In Vietnam it was considered extremely difficult for universities to pay the PERI subscription, currently heavily subsided by the government without contributions from the universities. However there was also a sense from the coordinating team that 'paid for' information will be more valued than accessing free information.

One barrier to the successful implementation of the PERI programme, although not directly treatable by INASP is the issue of internet connectivity. In fact access to e-resources had actually heightened the frustration felt by researchers:

> *We feel frustrated when we know all the resources are there but we can't access them*

> *Frustration level have increased when you cannot get online and need article or document urgently*

However INASP has attempted to address this issue though its research and development component, for example by authoring and publication of a bandwidth management handbook "How to Accelerate Your Internet: A practical guide to Bandwidth Management and Optimisation using Open Source Software." According to the 2006 annual report there were 6210 full text downloads of the bandwidth management handbook in the first two months of publication (November-December 2006). Connected to this some stakeholders expressed a general sense of frustration at being a researcher in a developing country – "When you see the resources other countries have feel frustrated; you put in so much time to achieve something that others can do in an afternoon."

Some stakeholders still prefer journals in their traditional form. For example one lecturer explained that when print journals were held within her institution students could look through back copies and observe the direction in which her discipline had moved: "You can see in the student's writing that they do not know where the discipline is coming from." Unfortunately materials held at the libraries are not able to be updated in the same way as PERI resources.

Technophobia, lack of appropriate IT skills and access to computers also represent major barriers for seeking information available online in some countries. Some stakeholders felt that reading from the screen was tiring and disorientating. Thus, books and journals in the form of hardcopies and print were still very popular among a majority of academic scholars irrespective of their status, from a range of disciplines. There is a need to publicize the electronic sources extensively to the end-users and also provide adequate training to ensure optimum usage as discussed below.

5.5   Access beyond abstracts
The lack of access to full articles was declared to be a major problem by many stakeholders.

> *Abstract is not enough and could be misleading*

> *You know the information is somewhere but you don't have access to it – even if you have money to pay the mode of payment is beyond you.*

It is clearly unproductive for researchers to be limited to data that can be gleaned from abstracts alone. However, in some countries abstracts were still viewed as a valuable source of information for many researchers who read them to stay in tune with the volume of materials created in their respective disciplines.

PERI staff explained that AJOL was designed to host abstracts only, initially due to technical restrictions relating to payment mechanisms and latterly reflecting the wishes of the scholars in African countries, who tend to be unwilling to give resources away for 'free'. Therefore the use of abstracts does not represent an INASP policy decision but the technical and cultural reality on the ground. Moreover researchers in developing countries can get free document delivery of articles through PERI funding, and therefore there should be no charge to the end user.

5.6   Capacity building needs

Despite the on-going PERI training provision component (see 11) in all countries a clear need for capacity development to access and make best use of the resources is evident.

> *There is a need to keep reminding the research community about databases, they keep on forgetting.*
>
> *We still need to remove the myth around the search*
>
> *Those who feel they are under-served do not know the range of what is available*

Researchers were said to avoid the use of PERI resources due to lack of understanding, intricacy in navigation and difficulty in retrieving relevant information. Due to lack of support system at some of the institutions, users felt left to find their own way around the resources, resulting in a feeling of isolation, especially when things went wrong.

> *The database has a lot of useful information but most of it is hidden and several researchers do not have the time to hunt for them. The experience of searching is not always enjoyable.* (Vietnam)

Users particularly seem to struggle with narrowing down the search results. Whilst access to such a vast pool of information was considered positive by some, others perceived this as inconvenient and time-consuming to browse, in the absence of structured trainings. The resulting burden of materials meant that some researchers become overwhelmed. Consequently with so much time spent on filtering and assessing online resources, researchers had less time to spend time on documentation and analysis. In this sense from the INASP perspective, providing information alone is not as important as understanding the tasks being performed by the users of the information and facilitating a cultural shift towards ownership and capacity.

Many researchers make use of the popular search engine Google (and sometimes google scholar) to locate information. Despite the fact that the majority of high quality academic papers are contained with publisher resources, Google is considered user-friendly and to provide instant results. However true *information literacy* calls for the skill to evaluate the quality of resources accessed through the internet, and there is need for PERI to continue to offer training to develop wider research skills. Furthermore confusion over subject categorization prompted users to work with Google - searching for data was considered easier and quicker as users did not have to browse through a variety of databases. In Vietnam, some users accessed PERI resources *only* when the search engine failed to provide adequate results. To summarise, use of PERI resources requires a lot of practice to find relevant information in spite of its capacity to provide a breadth of data. The development of a Help Guide for librarians (and subsequently for users) and broadening access and usage of any such existing materials on how to search for information would represent a good use of INASP resources.

In Ghana, librarians – many of whom were initially trained by INASP - offer free training to post-graduate students but take-up is low and critically most staff do not take active measures to encourage students to regularly make use of the new resources. Although students are not identified as primary stakeholders for PERI, their familiarisation with the resources fulfils the function of catching potential researchers early in their career.

INASP are not unaware of the challenges faced by users in this area, for example in their 2005 annual report they declared their intention to 'address the utilisation challenge' by looking for ways to 'deepen' their activities in partner countries so that resources made available through PERI were indeed used in research.

6.   'OUT'

"…and the results of their research is more widely used (OUT)"?

The Africa journals Online (AJOL) project was started in 1998 with the objective of cataloguing African-published journals, making them more visible and therefore improving their sustainability through increased subscription and greater impact. The project started with 8 titles, but continues to grow with 271 titles included by mid-2007 and 23 countries participating. Journal participation is free of charge and document delivery to the lowest income countries can be supplied at no charge. A small remuneration for every article ordered is paid to the journals.

In 2005 management of AJOL transferred to Africa and it now operates as an independent, not-for-profit organisation within Grahamstown, South Africa. Four organisations were short-listed and visited by INASP as part of the selection process. AJOL continues to be funded through INASP on a sliding scale for 5 years, and the NGO is working to develop a business plan for INASP. There is a perception from the INASP team that the handover of management has entailed a reduced service for beneficiaries but this is considered to be more sustainable in the long-term.

The findings from the field visit countries regarding impact of this component were relatively limited compared to the 'in' aspect of PERI. This is confirmed by the report of the stakeholder meeting 2006, which called for "even more work to support the sustainability of journals published in partner countries and to promote the aggregation of content and promotion". INASP staff acknowledged that inputs under this component are particularly targeted on supporting activities in particular partner countries at particular stages in their development. However some findings revealed the value of the 'out' component:

> *The publishing support activities have provided journals visibility that could not be attained otherwise* (Bangladesh)

> *PERI, for the first time has opened the door for Vietnamese researchers to share their findings with the world. This has given a new sense of pride.*

> *PERI exposed me to possibilities in my own field for publishing.* (Ghana)

> *Through INASP I have broadened my knowledge in journal authorship and management and known a number of other Medical Journal Editors* (Tanzania)

The 2006 annual report shows that over 25,000 abstracts of African published research are available to select for full text document delivery. *S*ome local journal editors reported on the impact of PERI support:

> *Our journal's visibility awesome increased and we are getting more submission from all corners of the world. This increase in submission of manuscripts is in turn helping us to select more quality paper for publication in our Bulletin.* (Ethiopia)

> *PERI has been the most useful in disseminating the journals. INASP has inspired journal publishers to upgrade their journals quality. It is a very good source of research articles for publishers to make their journal online and readers to view journal freely especially for developing countries like Nepal. The main impacts are bridging gaps by collaborating both national and international journal publications through networking and providing mentorship to help both national and international publications for upgrading the quality.*

Where a suitable professional association or network has not been identified, the 'out' component is managed through individuals other than the CCs (i.e. motivated, committed individuals in positions of influence e.g. in the Philippines a well known author.) However the disadvantage of this from a management perspective is the lack of joined-up thinking between

components. This is evidenced by a Tanzanian journal editor for example, who said: "I am not aware of the presence of country coordinators". Given that the components are supposed to be part of the same cycle, the impact of 'ins' can be measured by the 'outs'. Therefore if the CC team in a given country have a comprehensive understanding of 'ins' but do not know how they are contributing to 'outs', this means they are not able to connect the access to scholarly information to the results of research being widely used. If the PERI management is brought under one umbrella in a single country, this is likely to bring a wider perspective to the whole process and better co-ordination.

A further issue is that for the new JOLs, content is loaded by INASP which is very labour intensive - in time it is hoped that journals will be empowered to load their own content. In Ghana the results of journal editor training were variable as indicated by the two case studies below.

Box 3: Struggling journal editor

'X' received training 2-3 years ago but has still not uploaded her journal – she struggles to get peer reviewers for articles, and although supposed to publish annually has not done so for four years. X wrote to INASP listing her problems and asking for advice, in response to an INSAP issued email but she received no response. During the training she attended it was proposed to form an association of editors but to her disappointment, this never got off the ground.

Box 4: Empowered journal editor

'Y' participated in two INASP training courses in 2005/6 and has since uploaded 2 journals onto AJOL. Now his journals receive more emails, enquiries and orders for articles. More articles are submitted to the journal from across West Africa – the only downside is that he gets harassed by readers waiting for the next edition to be uploaded…!

A final challenge was noted in the Asian countries visited was that researchers are reluctant to publish due to fear of violating copy right issues. Researchers were reluctant to disseminate their work due to the assumption that the concept in question may already have been published on; fearing charges of plagiarism. Emphasis could usefully be given to building awareness regarding copyright issues and organising training sessions on how to write research articles; this would also establish a much stronger connection between the 'IN' and 'OUT' of the programme purpose.

7. Cost-effectiveness

To what extent was the management and implementation of the activities effective and efficient, and did they provide value for money?

Value for money could be seen from different perspectives: PERI offers a discount of 90% or more to access top journals and establishment of national consortia has also reduced the unit cost per institution.

> *PERI, though offering a lot, does not cater for all the needs and some major resources are not included. But, for this sum of money, this was far more than we could ever dream of* - Bangladesh

The INASP training team felt that workshop budgets are fit for purpose, compared to other donors that use much more funding to deliver comparable workshops. Small grants scheme for workshops organised by ex-trainees were highlighted by the INASP team as being high impact but low investment initiatives. Other improvements in cost effectiveness of workshops have also been identified: the average unit cost of an INASP facilitated or travelling workshop remains lower than in 2006 at approximately £5,250 for all workshops in this category in 2007 (£6,277 in 2006). This means an average cost of approximately £260 per participant trained in 2007 (£340 in 2006). The cost for local workshops has also fallen and remains very low at approximately £940 per workshop / £55 per participant trained in a national level workshop and £780 per workshop / £30 per participant trained at an institutional level workshop.

Regarding complementary initiatives there was no evident collaboration on the ground with organisations providing similar services. However INASP do collaborate on a small scale, for example on specific advocacy and workshop initiatives. Compared to PERI, HINARI and AGORA are perceived by stakeholders as more specialised and free, "they have good quality journals but there is no control by users; only what publishers are willing to give". Other stakeholder perceptions on the difference between INASP and complementary organisations include:

> *AGORA, EPSCO, HINARI are not user friendly*

> *eIFL offers more training and consortium building compared to PERI*

> *UNESCO have been very helpful in providing library training – they have some very good modules.*

> *PERI has not benefited medical science- HINARI has*

> *INASP is not seen as a promoter of open access but rather linked to commercial publishers* (staff member)

8.   Advising

Has the programme provided effective advice and support to its wider community and what levels of awareness are there of the opportunities available?

Related to the issue of resources and support there was a lack of clarity from some countries such as Vietnam, who get invoiced for their own subscriptions but seem to feel that INASP also are contributing financially and want to know the details of this contribution. With different countries having different arrangements according to the status of the programme and stage of progression through the PERI cycle (see section 12), INASP may need to be more transparent about its financial arrangements with individual countries.

In Nepal great value was accorded to the relevance and need for PERI – yet many stakeholders complained they were in desperate need of information about the programme:

> *Very few university teachers, researchers are familiar with PERI programmes. It is just beginning.*

> *I'm really glad you are doing this evaluation exercise and have told me about the Nepal Journals on line (nepjol.info) – we should however have heard about this long before now – it's really useful. University Dean.*

> *Nepjol is really useful to us – why has nobody told us about it before now" – Senior Staff member in Ministry of Forests and Soil Conservation*

Moreover there was a demand from some country programmes for more advice and guidance from INASP through coordination and inputs.

> *There is no standardisation at the moment. It's a learning by doing sort of management which is not considered as efficient.* (Vietnam)

There is a risk, given the differentiation in level of service between partner and network countries, of a lack of clarity as regards the 'minimum inputs' a network country is entitled to. This is demonstrated by some comments from the Philippines:

> *I have a box of materials here sent from INASP – I've not used it at all. Please have a look at it – it contains an INASP mouse mat and some INASP pens plus a load of INASP newsletters and leaflets. This is NOT what we need - it's not useful and adds nothing to what we already have!*

I'm very happy to be a real advocate for PERI. However I need clear guidance from PERI and INASP. To be frank I have not yet had this.

The need for guidance emphasised by the embryonic network programme in the Philippines perhaps highlights the continued need to be very transparent about the nature of support PERI can offer to a network country in order to effectively manage expectations. It is proposed that a PERI or INASP "Frequently Asked Questions" webpage for Country Coordinators would be useful as well as clearly distinguishing between partner and network countries on the website and in INASP literature.

In terms of awareness, PERI is not high profile 'brand', in other words the PERI programme or INASP organisation have consciously not been promoted in partner countries. INASP has taken the approach of trying to build relationships through an under-stated approach that promotes ownership and allows stakeholders to see the programme as 'theirs'. This is reflected in the fact that there is little recognition among stakeholders of INASP or PERI in partner countries, although people may be very familiar with e-resources. The INASP team tend to see it as a success for their role to go unrecognised, feeling that "To promote PERI is to take away credit from the libraries."

We didn't know there was a PERI programme which is not necessarily a bad thing. What we knew was that the University was providing databases of information.
(Ghana)

We all know about online journals but we don't know about PERI (Ghana)

Although this approach is in many ways commendable, the drawback may lie in the nature of PERI as a demand-led programme, where what partners don't ask for they don't get, and what they don't know about they can't ask for! Contrary to the impression given by the statement above regarding a box of PERI promotional items, there appears to be little 'advertising' of the PERI 'product' or 'services'. The CCs represent the pivot in the selection process, through knowing what is available and analysing the information needs in their country, with recourse to stakeholder meeting funds supplied by INASP for potential consultations. However a CC team or individual needing to make resource decisions for a whole country or region faces a challenging task.

The visibility and self-promotion issue is echoed in the report from the 2006 stakeholder consultation which states that "Most of our partners agreed that INASP needs to become more visible, possibly by forming stronger links with international associations such as IFLA, and to raise awareness and uptake of the opportunities available via the organisation." This connects to the wider issue of partnership building and advocacy (see 4.6.)

9. Innovation

How effectively has the programme developed and shared new methods and approaches in the field of enhancing research information?

The nature of PERI in its infancy was to pilot a particular model of development – the success of this pilot is evidenced by the way that progress has far outstripped indicators (see X.) INASP's 'test' models of deeply discounted, country-wide subscriptions to e-books and journals have proved successful. International publishers have proved willing and able to provide access at an average 97% discount, bringing the costs within the reach of consortia from developing and emerging countries. Although ICTs present challenges for those in developing and emerging countries (lack of access to computers, limited and high-cost bandwidth, skills gaps, etc) these obstacles can be overcome with support of PERI's complementary components, to enable participation in global research communication. This provides opportunities for research that were simply not possible in the paper-based world.

Various aspects of PERI can still be considered as innovative, such as the following:

- linking improvements in teaching and research to poverty reduction in developing countries
- the use of the cascade method of training with a 'south-south' learning approach;
- the component of commissioning research to address problems identified in the course of other components e.g. bandwidth
- the emphasis on strengthening local publishing and increased visibility of national research outputs
- negotiating with commercial publishers to agree vastly reduced prices for developing countries
- the consortium and 'self-negotiating' mechanism as a means of moving country programmes towards a sustainable position
- the low-key approach to organisational branding in order to develop ownership and sustainability
- the harmonised approach to obtaining donor support for the programme i.e. presenting progress and introducing programme phase 2 in a transparent way to a cross-donor audience

Perceptions of innovation are confirmed by the country programmes:

> *PERI is an innovative programme. It has managed to combine the moral rights of the developing world regarding access to knowledge, and our limited financial abilities with the commercial goals of publishers and succeeded in finding a working solution. It is also great for encouraging countries to stand on their own feet, rather than spoon-feeding.* – Bangladesh

> *The PERI Program has an innovative and laudable idea to support the researcher of developing countries through access to intl. journal and disseminating the articles published in local journal to wider circle* - Vietnam

Finally INASP actively encourages staff and partners to contribute to its ethos of being a learning organisation; this is symbolised by the constant reflection on and writing up of experiences, and the self-aware attitude of staff. The organisational learning extends to a range of papers including case studies of innovation in country programmes. The only challenge of this organisational culture is the risk of over-consultation of stakeholders resulting in consultation fatigue. (See 2.1 for details of INASP M&E)

10. Networking

Has the programme strengthened and enabled networks that support research capacity?
Were the roles and responsibilities of those involved in PERI clear?
Which relationships in PERI were most effective?

INASP's relatively small size requires a strong organisational focus and the formation of strategic partnerships to extend the organisation's reach and impact. INASP could stand to build its visibility, possibly by building stronger links with complementary organisations as well as networks and organisations in partner countries.

10.1 Roles & relationships

The traditional role of Country Coordinator (CC) clearly emerged as a pivotal one within PERI provision, whereby the programme hinges on CC contacts and commitment and varies accordingly from country to country. Although it appears that this dependency on the CC has not in any case derailed the programme, it has affected the pace of change in various countries; however this has usually been attributed to the environment rather than the individual CC. INASP are now working towards a team approach - considered to be more effective, sustainable and equitable - in an estimated 80% of countries. This consortia approach is discussed in more detail in section 10.4.

Within INASP 'CC' is a generic term for a person or an organising group, however within a team approach, there still remains a 'lead' coordinator. The position is unpaid but is intended that being a CC facilitates or supports the fulfilment of a remit or job. The stakeholders in CC teams are ideally drawn from bodies that already have a national mandate in supporting research capacity, such as ministries of science and technology, ministries of education, national academies, professional associations, library consortia, university grants commissions, national research and education networks and beacon national universities.

The teams are not employed or paid by INASP. Rather INASP supports their existing work, within their communities' identified needs and strategic and policy frameworks. Embedding the activities in this way within national and organisational strategies and engaging individuals who are influential leaders in the national academic community are critical for success.

Some CCs are reportedly very dedicated, for example using their holidays to deliver training. However other CCs - although interested in strengthening and expanding the programme - have heavy existing workload, low salary and feel a lack of incentives; in this scenario providing PERI services is perceived as an extra burden (e.g. CC team in Vietnam.) According to the CC in Bangladesh however, the feeling of contributing constructively towards their own institution and the country, a type of 'selfless attitude' can count for more than any material incentive.

In terms of equity, power is rather concentrated in 'the hands' of the CC, for example in Ghana the CC is also the Consortium Chair, who also coordinates for various other complementary programmes such as eIFLnet. Alternatively this could be seen as a strength in terms of harmonisation between NGOs. Some stakeholders felt that links between the CC and some institutions were weak and perceived the CC responsibilities as unclear. "The CC's only contact with us is to inform us of new databases." In general it is recommended that INASP develop transparent criteria and procedures for selection of new CCs and provide CCs with a structured induction in order to give clarity on their role:

> *I do not want to be paid to be a country coordinator – I just want to be given clear guidance on what to do* (Philippines)

In some countries communication between institutions and the CC team was based on personal rapport rather a comprehensive professional communication network. This network often needs to be strengthened or built as the existing relationship between universities can be more akin to competition and rivalry. One way that INASP are working towards is to include CC team members from different institutions. In Bangladesh the CC team was observed to consist of a strong team of enthusiasts with a wider network of support and connections. However, the team lacked a personal action plan or focused strategy to promote, implement and/or sustain the services. Training in consortium building might be highly valued in such circumstances.

In terms of other programme relationships and coordination, it is perceived that PERI components in-country stand alone rather than in an integrated way. For example VJOL is completely separate from other PERI components with different management. The lead coordination agency for PERI services (National Centre for Scientific and Technological Information - NACESTI) appears to have very limited knowledge of VJOL. The implications of this are mentioned in section 6 above.

The question of whether the library community is sufficiently close to the publishing community for country programmes to be other than separate, is answered by a few cases where a unifying coordination body has been made responsible such as Pakistan and Bolivia.

Box 5: Case study of Pakistan Higher Education Committee

> The coordinator of the Pakistan programme strongly believes in the benefits of a coordinating institution such as the Higher Education Commission (1000 staff) who manage PERI in Pakistan. The importance of government buy-in and the need for a strong champion cannot be under-rated in the Pakistan context.
>
> In Pakistan PERI is declared to have had a deep impact; without PERI there is likely to have been a rise in published articles but not such a steep one as can be demonstrated today.
>
> In terms of equity it is felt that the programme has been even-handed: "take a remote region in a no-mans land, no one wants to go there, it could be high in the mountains or in the desert, we have provided quality resources." However it is also considered important not to concentrate solely on the top institutions but to let the less capable be exposed. In Pakistan HEC also plan to give access to PERI resources to schools and colleges.
>
> Two issues which remain to be addressed include training and copyright. The training context has changed and there is a need for updated packages for the new needs of 'slightly experienced' users. Copyright policy needs to be strengthened and strategy addressed.

Finally PERI is based on the expectation that the relationship between librarian and academic is a strong one, however members of the INASP team hypothesised that PERI design might possibly have over-estimated the strength of this relationship. One of the PERI training courses is designed to build this relationship by inviting an academic and librarian from each institution to action plan together.

A stakeholder in Vietnam claimed that "There is much more interaction between researchers and librarians, as a result of PERI". In Ghana some academics are "talking more to library staff on a regular basis" and this "relationship is enhanced by interaction" which bridges the communities. Due to the exchange of information involved in the discussion groups convened for the purpose of the evaluation, some stakeholders in Ghana said that they "now see all sorts of possibilities" for collaboration and working together.

In some instances the relationship between Librarians and researchers was declared to be weak. For example in Vietnam librarians reported that dissemination of information about PERI resources were difficult to comprehend, moreover few researchers would seek help from the librarian aside from asking for passwords. When training was offered to researchers, attendance was negligible. Where users gave positive feedback on the support made available they also seemed to believe that this was mainly due to their personal relationships with the librarians or CC team.

10.2 Communication
A key means of communication established by INASP targeting country programmes is the 'D groups' or discussion group list servers. This email communication has not proved hugely successful, as it is not easy to keep the impetus going or generate spontaneous interaction between group members.

Responsibilities of INASP and of the country programme can be blurred. For example the Vietnam programme reported that some universities send requests for access to journals straight to INASP, and the CCs are often not informed who has been given permission to access journals finding it difficult to monitor which institutions have access to which

resources. However INASP in turn reported that the registration system does not work in this way, and that the CC team manage and approve all applications.

In the case of Ghana which has moved to what INASP call a *self-negotiating* model but is still considered as a partner country, a range of key stakeholders were not clear that INASP still has a presence in Ghana.

> *We register through the PERI website, PERI is still the middle man but that's where the involvement ends…there is no funding anymore.*

> *I would like it on record that it would have been better to do the evaluation before, not when the programme in Ghana has finished.*

> *We thought PERI had ended… we don't understand (what the PERI/INASP role is)… – we thought we didn't have any relationship with PERI till you (…the evaluation consultant…) came.*

Given the organic development of INASP's model of sustainability, Ghana has represented something of a 'test case' and indeed even accelerated the process by opting for self-negotiation at an earlier point in time then planned by INASP. The management of this experience and plotting of the 'model' is still being explored by INASP.

10.3   In-country marketing
In the words of a Bangladeshi stakeholder:

> *It would take some more time for PERI to become more popular and user-oriented, some departments of the Universities and institutions are not much active about it. Some more focusing have to be made, especially in the public universities. Such as, sending e-mails and distributing leaflets etc. for wide coverage.*

Within the circle of individual institutions it was noted that Librarians/INASP could promote the PERI resources more effectively. There is thus a critical need to encourage institutions to instigate a strategy to market PERI resources within academic circles and the University's hierarchy. Promotion of the services could include:
- E-mails to staff members with useful links;
- Training courses for staff and students;
- Showcasing information on the Institution's main website;
- Publicity displays, leaflets and regular updates in form of newsletters regarding latest PERI services

These approaches were being used relatively successfully in some countries.

INASP could also benefit from developing more effective routes to inform librarians about their services. Currently, a lot of information is stored in the INASP website, which some stakeholders find quite impenetrable and do not visit regularly. Perhaps stakeholders could be kept informed in addition through other means such as regular updates in the form of newsletters.

10.4   Networks – the Consortium
The main networking function, which has been informally identified by INASP as a model for transformation of country programmes from dependency to self-sufficiency, is that of consortium building. Stakeholders in the INASP consultation meeting of 2006 agreed that the "psychological impact of a consortium is a catalyst to development and has facilitated libraries working together." The PERI model shows a move beyond self-sufficiency to inter-dependence (see model section 12.)

Consortiums take different forms and evolve in different ways in different countries. Consortia are often triggered by PERI but evolve into a more wide-ranging library consortium of which one strand is PERI. In Bangladesh for example, coordination meetings are held 3-4 times a year, journal needs analysis is conducted for universities each year, with a standard criteria for payment (depending on size and resources of each university.) PERI has supported a

consortium of universities to be established in Vietnam for the first time (on a non fee basis). Meetings are sporadically arranged and are mainly reactive (only when there is a problem.) Creation of consortium in these two countries is considered beneficial, for example more cost-effective training can be arranged across institutions. Consortia may consider paying expenses etc for a full-time CC post.

Box 6: Case study of Bangladesh consortium model

> Bangladesh INASP-PERI Consortium currently has 20 member institutions and the number is increasing every year. The consortium is a self-sustainable body wherein the members (depending on their size and capacity) pool resources into a fund for subscription. Such a Consortium is the first of its kind in Bangladesh and is leading to other areas of collaboration beyond issues related to PERI. Due to its large network, the consortium is able to bargain effectively with publishers. Since the expenses of some smaller institutions are being subsidized by some larger ones, such an arrangement could in future result in potential conflict or withdrawal of memberships, particularly if the requested journals by the larger institutes are not obtained. However such subsidies have, for the very first time enabled smaller institutions to access international journals. Provided adequate training is given on negotiating with publishers, the Consortium has the potential to be a completely self-reliant entity. With a team of excellent country co-coordinators led by a well-known academic, the Consortium has devised a sustainable mechanism to provide technical support towards accessing e-resources, thereby further reducing the dependency on INASP. A total of 3% of the pool fund has been allocated for facilitation such service. The CC team feels that not having access to quality journals is no longer an issue in Bangladesh and that they are at par with their colleagues in the developed world. They expect the impact would soon be translated into increasing numbers of journal publications by Bangladeshi authors.

As Ghana has one of the longest-standing consortia within PERI, it was assessed as a case study with lessons learnt identified below. Should this model be formally pursued by INASP in other countries then special attention can be paid to the Ghana experience. A SWOT of the Ghana consortium is included in Appendix 8.

Voices/lessons from the transition to a self-funding model in Ghana are recorded below:

- *We had to wean ourselves from INASP… having the consortium is making us stand on our own feet.*
- *It is a much more independent relationship now, we get advice from them (INASP)… we were left to fend for ourselves, we need to be more creative, take the initiative. We have increased our skills through this semi-autonomous state.*
- *Fortunately we had breathing space when we became autonomous before the next payment was due. The consortium sent a proposal to World Bank TALIF project and were among the first to benefit from a grant. Other countries may not be so lucky, perhaps INASP could cascade the process a bit instead of the abrupt cut-off of funding… take a more gradual approach.*
- *PERI sensitised for one year before cutting off support. As it was 4 countries not only Ghana we didn't feel hurt… they didn't abandon us as such.*
- *It was a painful thing when INASP cut us off, it would have been better if they could continue to support training or support us to look for funding from other sources.*
- *If INASP are no longer funding the programme then there is no need for their involvement – it is our money we are putting in so we want to decide what we are doing with it.* (leading to early self-negotiation)
- *eIFLnet has done more to help establish the consortium than PERI – it funded our office rent for a year, set up the office with all the equipment and gave training.*

Box 7: Case study of Board of the Consortium of Academic and Research Libraries, Ghana (CARLIGH)

The consortium is currently composed of 17 members, 2 polytechnics and 2 specialist universities (or 'affiliate members' who subscribe to a single database of their choice). As well as state institutions the consortium includes 7 private universities. CARLIGH meets twice a year, has a website, constitution and bank accounts.

Each consortium member pays the same subscription fees regardless of size or spending power- it is reasoned that although private universities may be smaller they have better connectivity so have potential to use the resources more. The consortium membership fee is $500 a year plus subscription costs. There is a policy of transparency whereby financial statements of account are presented at every meeting. Private universities will be unsubscribed if they do not pay, whilst state institutions are given more leniency due to confidence that funds will ultimately be made available. There are certain perceptions of inequality on the side of the smaller private university members.

The consortium convenes 4 working groups bringing in non-consortium members where relevant. The groups are focused on Marketing and publicity; Education and training; ICT, Hard and Software; and Bibliography Development.

Although PERI initiated the consortium, it has now passed into a self-negotiating phase, whereby for example if they want to use INASP resource persons for training then they would have to pay. There have been some tough negotiations between the consortium and publishers; however e-resources have mostly stayed the same price as negotiated by INASP. Through bargaining CARLIGH has in some cases managed to negotiate lower costs from publishers. The West African representative for the publishers is Nigerian so the consortium finds it easy to "haggle and complain together". Three members received training in negotiation skills through PERI.

The CARLIGH Chair is aiming towards the sustainability of getting institutions to pay a year in advance so that threats to financial viability are diminished. CARLIGH also focus on growing the consortium by recruiting new members. They have raised awareness by promoting the consortium at the national Vice Chancellors' Group. Universities, University Colleges, teacher training institutes, research institutes and polytechnics are all eligible but higher education colleges are not. When an institution joins CARLIGH each VC signs an MOU. Recruitment of new members will lead to a reduction in the cost of subscription to all.

CARLIGH recently received a new TALIF (World Bank) grant awarded for training. An active training programme is being run, including both free and contribution-lead training.

The consortium feels there is an open communication channel with INASP, who provide information and signpost to new publishers. CARLIGH have been provided with funding for a fully equipped and staffed office for 1 year by eIFL, as well as being trained in consortium building.

10.5   International networks

Country programmes are eager for best practices to be disseminated between countries and are keen to initiate new ways of sharing rich experience and ideas. Several librarians made a point of underlining the continuing value of face to face meetings, seminars and briefings of various kinds as an indispensable way of sharing lessons and learning.

In terms of learning and international exchange, PERI CCs attend an annual international conference, considered highly useful to share ideas, problems and experiences. In the

absence of this in 2007, one country stakeholder commented that: "Without these, everyone is doing their own thing, with no togetherness or cohesion. Now INASP picks individuals to attend summits but there is no transparency or feedback." Conversely INASP is planning to involve CCs even further into the decision-making of the programme, for example by involving them in the selection process for new partner countries.

A recommendation from the 2004 mid-term review was that regular in-country meetings of stakeholders be held to guide management of the programme- in response £250 is offered to countries in the annual agreement, to be used to run meetings every 6 months.

Another recommendation implemented from the 2004 programme review was the exchange of country experience through international peer visits. However stakeholders did not feel that the impacts from these visits were very strong; for example when the Nepalese CC came to visit, the Vietnamese did not feel there were many opportunities to learn. This was echoed from the Ghana/Kenya visit – both parties would like to learn something, rather than a one-way experience. It was generally advocated that a better use of INASP resources would be to arrange regional workshops for learning and sharing.

Specific feedback contained in the peer exchange visit reports of 2007 explain that whereas South-South peer exchange arrangements provide opportunity to share experiences they do not offer help on how to move forward in technological development, whereas The North-South Programme gives ideas towards closing the digital divide:

> *Depending on the region visited, the South-South programme may provide no benefit to the participant. Sometimes there isn't much to learn from the country visited. You cannot go wrong with North-South programme. There is always something new.*

Whilst PERI has strong partnerships in the countries in which it works, there is still room to strengthen partnerships with organisations engaged in similar work such as HINARI, AGORA and IFLA as well as networks and organisations in partner countries

11. Training
How transferable is the training offered through PERI?
How effective is the cascading training methodology developed by INASP?

It is estimated by INASP that during 5 years of PERI a minimum of 4,000 people have been trained (mostly as trainers), with at least 9,000 more involved in follow-on training. The sheer scale of the need is why INASP chooses to target enablers (mainly librarians) rather than end-users (researchers) directly.

With the limited country visits it proved difficult for the evaluation team to establish the quality of the training, given that either few trainings had been so far delivered, or workshops took place several years ago. In Vietnam and Bangladesh librarians confess that they lack skills needed to cater to the requirements of the researchers, which they equated to a lack of systematic training. Whilst INASP and the CC teams had organized specific sessions in using the PERI resources, these were viewed as being more of an introductory dissemination of information. In Ghana training had not been delivered by INASP for the last year, but prior to that, for example all librarians at the University of Ghana had received training (3 workshops.) It was noted that funding and support for training delivery is critical and fortuitously Ghana had obtained support from another source.

Ghanaian stakeholders reported that:

> *The databases themselves are a mine of information but there is a poor search culture among academics themselves. The databases are phenomenal as a research platform but people don't understand search skills as a particular skills set.*

As information professionals we should be given lots of training, sometimes a little thing will be a big problem and you can't go around. So much information is out there but how do we get access?

One academic recognised that training is needed to build skills in his institution, but was aware of a hierarchy which meant that he could not offer to train or assist his more senior colleagues in seeking information. This is reflected in feedback from training evaluation in 2007:

More people to get opportunity of such courses and especially senior members of staff for bringing awareness of the importance of information and easy access to internet, hence enhancing investment of the facility[11]

In general, despite offering training to students as part of their induction process, librarians considered themselves as information experts but not training specialists. Yet it was also claimed that INASP training events have awakened libraries to the need of adapting to the new age of digital librarianship. Staff working in Latin America suggested however that training materials are produced mainly with the African audience in mind. The INASP training team declared that their intention for 2008 was to make their workshops more interactive, with discussion of real problems and more practical hands-on training. As INASP training is demand-led, many stakeholders may not know what is available.

A cascade methodology of training is actively pursued by INASP, whereby participants of the initial training go on to deliver training, both in other countries in the region (with a fee) and to roll out the training within their own country (with no material incentive). See further details of this mechanism in appendix 10.) In 2007 96 workshops were delivered —all workshops locally organised to some degree (most being completely locally organised); of the 96, 16 national workshops were INASP or international expert led; 80 institutional or local workshops were locally facilitated and organised. These activities resulted in: 2,064 people trained from 417 organisations in 15 countries in Africa, Latin America and South Asia. During the stakeholder meeting of 2006 it was recognised that "this type of training carried out by INASP strengthens capacity by recognising that people have their own context, which they understand better than anyone else. It enables one person to transfer skills to others while creating a pool of experts."

This mechanism offers an organic and sustainable approach to building human networks and training capacity and INASP consider that using local trainers ensures training delivery is more appropriate, 'comfortable' and relevant for participants. The cascade model offers the advantage of building status, confidence and experience of trainers through sharing of expertise. Respondents confirmed that this delivering of training enriches the CVs of individuals. In Ghana in 2004-5 all librarians in private universities were trained through the cascade method. Appendix 11 shows the full menu of PERI training modules.

Regarding the impact of training, it is considered by the INASP team that in common to most capacity building programmes, PERI capacity enhancement is relatively slow, taking 2-4 years to integrate training in a country and bring about changes in behaviour. The way in which CCs arrange training programmes could be more equitable i.e. inviting the 20 'biggest' institutes to attend a workshop. Other remarks regarding the training component include:

- *The cascade hasn't happened – the libraries have their own daily grind*
- *Training is designed with a logical sequence in mind – sensitisation, ToT, techniques, capacity to research, M&E – without all these natural sequence is lost*
- *Training which is purely demand driven is inadequate as people 'don't know what they don't know'*
- *The Building Relationships course was not very successful, there was no follow-up or cascade (Ghana)*

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[11] Summary review of impact findings undertaken 4-6 months following workshop for workshops conducted during January – July 2007

A significant 'aside' of the PERI training programme is that the sheer volume of downloads of training modules from the INASP website. Over 75 PERI workshop units are available via a Creative Commons license with at least 5,200 individual registrations to download these materials. During the 2006 survey, the majority of stakeholders said they used the materials for 'working with others' rather than self study.

12.   Sustainability

Have the activities supported via PERI become sustainable within countries? If so, in what ways?

INASP has recently recognised that PERI is currently in a 'transitional phase' aiming towards helping countries build relationships to negotiate with publishers directly. A tailored country-owned 5 step model has emerged and been developed, where partners move from initiation, to inception, to implementation, to independence and finally interdependence. The ultimate stated goal of INASP's approach is to strengthen or build local capacity, so that the activities become country owned, driven, managed and implemented. To this end, all activities are said to be designed around a 'cycle' (depicted below.)
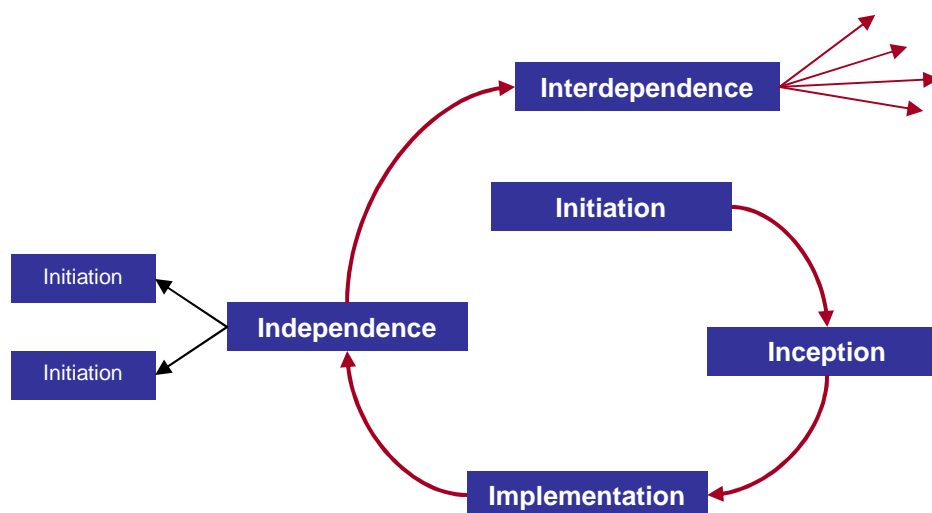
INASP's activities are designed around the common concept of a cascaded approach with the aim that every INASP-facilitated activity will lead to a subsequent country owned follow-on. Under *initiation* INASP and the potential partner country develop mutual understanding of context, needs and opportunities; under *inception* there is the formation of a 'country coordinating team' that have national mandate in supporting research capacity to which PERI can contribute. Under *implementation* access to international research; strengthening national research publication and building capaity to use and manage ICTs for research takes place; whilst during *independence* countries initiate and implement their own activities using materials, experience and advice obtained via PERI. Finally in the future *interdependence* stage aspired to; countries or institutions would provide guidance and support to similar countries/institutions using the capacities and experience gained via PERI. There is still room to explore the potential for inter-dependence between countries and what form this might take in reality. See appendix 12 for mapping of partner countries against the PERI model of progression.

There was evidence of independence from INASP in several countries, as evidenced by these comments from Bangladesh:

> *PERI has lead to the formation of this consortium of twenty odd libraries in Bangladesh. And already they are starting to think beyond PERI in lines of direct negotiations on resources not included in PERI as well as other areas of mutual co-operation such as in library automation etc.*

> *Convinced by the benefits of the e-resources, researchers in ICDBDR are now demanding for more e-resources. Before the demand was created from the top; now it has a bottom up process.* (Bangladesh)

In 2006, almost exactly 50% of the total programme budget (excluding INASP Management & Coordination costs) was contributed by the partner countries themselves. This suggests that the activities are both affordable and sustainable in the long-term for many countries. Ironically 'self-funding' countries (such as Kenya, Malawi, Zimbabwe) tend be countries where donor funding is low; the move towards financial independence does not work so well in countries where donors have a high profile and there is less incentive to generate funds. According to the 2006 annual report, steps toward self-sustainability are also more problematic for some countries who are still heavily dependent on INASP for in-put and actions (e.g. Rwanda and Zambia). INASP are developing a strategy for overcoming this through country specific support documents and help sheets.

There are positive reports from Ghana and Bangladesh as regards the sustainability of the consortium model:

> *INASP support is important, less financially but more in the way it is now. Here we need to find long-run bases to ensure sustainability. Still we are dependent on a few people, but now the determination and stakes are so high that I believe in the event of a problem, institutions will come together and sort out any problem for their own sake.* (Bangladesh)

Some newer country partners felt more insecure about sustainability issues:

> *It is not clear how long the PERI Program will support hosting of the journals. A lot of uncertainty is there like- if the funding for PERI Program is not available, may be in future we have to pay to access our own journal. These are some unanswered issues which need to be clarified.* (Vietnam)

The key question revolves around how to make the limited resources available work best for INASP and its country partners, and how to ensure best value for money on a strategic level. For example the question arose as to whether INASP should be working in Latin America – although funds are available, the focus on that continent may not be strategic or play to INASP's strengths. This issue was addressed during a 2004 conference in the region, prompted by INASP's recognition that there were a number of particular challenges faced in implementing and supporting PERI within Latin America.

INASP is currently refining its rationale for working in a given country, and a more targeted policy and active strategy on how make resource decisions such as selection of network countries to become partner countries is being considered (see appendix 1). By working in more developed countries INASP intervention may have bigger impact, however Pakistan was given as an example of a programme which was working well, as a very poor nation with 'pockets of excellence'. In order to contribute at goal level, INASP would need to concentrate on a country where policy makers are responsive to researchers.

The question of sustainability is also connected to that of equity; as one staff member pointed out "In many cases PERI is only a reality at the national centre". Anecdotal examples were given of 'jealous guarding of resources' between institutional competitors within country programmes. For this reason the programmes in Bolivia and Cuba are hosted in the Ministry of Education not in a lead institute. In Bolivia it reportedly took 2 years to develop national ownership of PERI, through a 2 year donor-funded full-time CC position - this however reflects a turbulent political context. Strategically there is a need for visibility of the PERI-

resources within and concentration on linking of these to, overall national strategic priorities, as well as towards higher education.

On a more micro level, human resource management was mentioned as an issue of sustainability by some stakeholders. Local staff change in libraries is a barrier for improving performance- it was explained that in some countries turn over of librarians is high and so training resources are often wasted. It was proposed in Vietnam that more representatives from each university should participate in training in order to ensure sustainability. Some countries also mentioned that as in any organisation, changing human resources can affect rapport and relationship building: "Turnover of staff in INASP has been a slight problem. I know staff in INASP are busy but it's really important that we get replies to emails. Otherwise we quickly lose confidence."

13.   Equity

How, if at all, has the programme addressed issues of gender, disability and social/environmental responsibility?

The fundamental design of PERI addresses an equity issue: the right of access to knowledge for a portion of the world's population (i.e. the developing world), that would be excluded from this knowledge without such efforts.

To briefly touch on gender: it was reported that CC posts are fulfilled by men and women in roughly equal numbers. A further equity issue identified was that of language, in that it represents a major barrier for some country's researchers to access information (e.g. Vietnam.) However by widening the net of partner countries beyond English-speaking only nations, INASP has attempted to level the playing field.

Programme distribution across countries and regions may represent the most significant equity issue, due to:
- PERI components not always comprising an integrated package. Different components are offered to varying degrees in different countries - although to some extent this is due to the take-up of activities and components by the countries themselves. For example Madagascar and Lesotho were originally only interested in participating in component 1
- Relatively loose criteria for country engagement (i.e. many countries are eligible), and the all-encompassing approach of 'network countries' with limited access to PERI services (due to necessary resource constraints)
- Country-specific funding from some donors. However 'un-tied' funding is used by INASP to 'fill the gaps'

It is not intended to suggest that INASP use exactly the same approach or resource budget in every country, only to highlight the issue of strategic focus and programmatic impact and best use of fund therein.

In terms of regional equity it is clear from the way that PERI country programmes are initiated that key national institutions in urban centres and capitals benefit most from PERI, whilst in reality INASP may not be working with more remote or marginalised institutions. This can be as an indirect result of who is chosen as CC or 'host' institution.   By the admission of the team, INASP could spend another five years just rolling the programme out to regional areas in each country; "mobilising all stakeholders, not running ahead with the fastest, and stepping back to fill in the gaps". In this scenario, a strategy would have to be developed as to how concretely to achieve this and identify new partners, perhaps with the remit to develop marginalised areas. However the point was made that research by its very nature is elite, and that the rationale of INASP to support researchers cannot be reduced to purely equitable grounds.

Summary of Recommendations for next phase of PERI

1   Currently INASP may be missing the opportunity to advocate for the importance of research communities on a global scale. There is considerable scope for INASP take a broader advocacy role than it is does at present (see section 4.6)

2   In order to present an explicit focus on poverty reduction and development issues there is a need to link PERI to broader national poverty reduction and national development strategies (see section 4.7)

3   INASP should continue to develop its approaches to partnership working, to become more visible and maximise the impact of its work. By building stronger links with international associations and further strengthen partnerships with organisations engaged in similar work such as HINARI, AGORA and IFLA as well as networks and organisations in partner countries (see section 7).

6   There is a continued need for PERI to substantiate exactly why certain journals are not represented within their packages i.e. that these publishers are not willing to negotiate on their prices (see section 5.3) and to clearly communicate the services they will provide to network countries in order to manage expectations.

7   There is a need to support institutions in country programmes to categorize journals and periodicals in a manner that is comprehensible and easy to access from a variety of subject disciplines. An explanatory statement for each of the journals would assist users to navigate, and lessen the burden on the potential users and ease the process of referencing (see section 5.3). Web design courses to support libraries to develop a common PERI platform, allowing the user to search across all subscribed resources at once rather than having to browse each publisher's website would be highly valued (see section 5.3).

8   The development of a Help Guide for librarians (and subsequently for users) on how to search for information would represent a good use of INASP resources (see section 5.6). as well as promotion of existing resources. Likewise a PERI or INASP "Frequently Asked Questions" webpage for Country Coordinators would be useful (see section 8).

9   Emphasis could usefully be given to building awareness regarding copyright issues and organising training sessions on how to write research articles; this would also establish a much stronger connection between the 'IN' and 'OUT' of the programme purpose (see section 6).

10   INASP needs to develop transparent criteria and procedures for selection of new Country Coordinators and provide them with a structured induction in order to give clarity on their role (see section 10.1).

13   There is a critical need to encourage in-country institutions to instigate a strategy to market PERI resources (see section 10.3).