

Toolkit to improve **visa and passport equity in Global North-South research partnerships**

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Introduction

What is the issue, and why is it important?

The increasing internationalisation of higher education (HE) has led to more research collaborations between academic institutions in the Global South and the Global North^{1,2}.

These collaborative partnerships between research institutions and individuals from the Global North and South are crucial for promoting a fair exchange of knowledge and ideas. Such partnerships offer an opportunity to address global challenges collectively.

However, a major barrier to these collaborations is the difficulty for researchers to move easily between the Global North and South (and vice versa) and between two Global South countries due to visa and passport restrictions or requirements.

Visa and passport inequities have been increasingly recognised as a significant barrier to these partnerships³. While these inequities can exist between Global South countries, they are most common for travel from the Global South to the North.

This toolkit aims to reduce these inequities and facilitate easier travel for Global South partners. It is aimed at research teams working with Global South partners.

1 Global South broadly captures countries in Central and South America, Africa, and Asia, while Global North includes developed countries in Europe, Northern America, etc.

2 Aboderin, I., Fuh, D., Balcha Gebremariam, E., & Segalo, P. (2023). Beyond 'equitable partnerships': the imperative of transformative research collaborations with Africa. *Global Social Challenges Journal*, 2(2), 212-228.

3 Bandara S, Zeinali Z, Blandina (M, Ebrahimi OV, Essar MY, Senga J, et al. (2023) Imagining a future in global health without visa and passport inequities. *PLOS Glob Public Health* 3(8): e0002310



How was the toolkit developed?

- Two empirical phases informed the development of the toolkit:
 - » Phase 1: A survey was conducted with 53 University of Bristol staff and 22 Global South collaborators.
 - » Follow-up interviews were conducted with 12 respondents (four from the University and eight from the Global South).
- * *A summary of the two phases can be accessed [here](https://express-licences.bristol.ac.uk/product/tepso-toolkit)⁴.*
- Descriptive statistics and simple thematic analysis were used to analyse the data.
- The toolkit was conceptualised based on the findings from the two phases and discussions with project team members.
- User feedback on initial draft informed final toolkit.

⁴ <https://express-licences.bristol.ac.uk/product/tepso-toolkit>

What is the scope of this toolkit?

The scope of this toolkit is for visa applications and travel for research partners between Global South and the Global North, specifically the UK. However, some of the toolkit's contents may be helpful for travel to other Global North countries, within the Global North (especially for individuals with Global South passports), between Global South countries, and Global North-South travel.

Travel within the scope of the toolkit includes:

- a. Research dissemination meetings such as conferences, symposiums, and professional society meetings.
- b. Project-specific research visits such as data collection, joint analysis, and project investigator meetings.
- c. Upskilling visits to research institutions, such as attending professional short courses, professional fellowships, and exchange programs.

Sections of this toolkit

This toolkit contains two major sections, which include:

- Considerations – These are six essential considerations for visa and passport equity.
- Guide on available resources – This has resources designed to support Global South partners during the visa application process.

A woman with dark skin, glasses, and a plaid jacket is seated in an audience, looking towards the right. She has a blue lanyard around her neck. Other people are visible in the background, slightly out of focus.

Considerations for Visa and Passport Equity

Considerations for Visa and Passport Equity

1. Inclusive, fair, and equitable research partnerships

Global South partners should be viewed as equal participants in research, ensuring two-way mobility (UK-Global South and vice versa). Addressing agenda-setting dominance by the Global North is key to fair partnerships.

Actions: Plan trips to and from both regions; agree on travel schedules and frequency with Global South partners.



2. Budgeting for all visa application costs

High visa and flight costs hinder Global South mobility. Equitable partnerships should account for these expenses.

Actions: Include visa fees, transport, and flights in budgets. Liaise with finance for timely reimbursements.



3. Facilitate documentation to support application

Proper paperwork is crucial for visa approval. UK hosts must ensure all documentation is provided to Global South partners.

Actions: Guide partners through visa types, ensure accurate documents, and provide support letters if needed.



4. Timeliness

Visa processes are lengthy and uncertain, requiring early planning and coordination with Global South partners.

Actions: Develop travel timelines at least three months in advance; prepare invitation letters and support documents early.



5. Communicate effectively

Open and continuous communication between visiting partner(s) and hosts is essential throughout the visa process, especially regarding application outcomes.

Actions: Establish clear and well-defined feedback channels to discuss application outcomes. Avoid assumptions about participation after visa decisions.



6. Explore buffers and alternatives

Rejected visa applications necessitate contingency plans, such as alternative meeting locations or virtual options.

Actions: Consider visa-friendly locations for meetings; have a debriefing session, counseling or other support if visa is rejected; and consider virtual participation if appropriate and fair to partners.

1. Inclusive, fair, and equitable research partnerships



Visa and passport equity is nurtured within **an inclusive, fair, and equitable research partnership**. Global South partners should be seen as equal partners in the production and dissemination of knowledge. Consequently, mobility should be encouraged in both directions between the Global South and the UK, i.e., UK-Global South and Global South-UK.

Why this consideration is important

The dominance of the Global North in agenda-setting is one of the most significant criticisms of the extant Global North-South partnerships⁵.

Agenda-setting, including timelines, direction, and frequency of travel, can often be controlled by Global North partners.

It is therefore important to proactively involve Global South partners in developing inclusive, fair, and **equitable partnerships where they participate in agenda-setting, including travel planning**.

What can we do?

- Fairly **factor in mobility in both directions** (UK-South; Global South-UK). Ideally, every project trip to the Global South should have a companion trip to the UK.
- Discuss and **decide with the Global South partner on the timing and frequency of travel** to the UK that can be supported by the project budget.

⁵ Flint, A., Howard, G., Baidya, M., Wondim, T., Poudel, M., Nijhawan, A., Mulugeta, Y., and Sharma, S. (2022). Equity in Global North-South research partnerships: interrogating UK funding models. *Global Social Challenges Journal* 1, 1, 76-93

2. Budgeting for all visa application costs



Flight and visa application costs are key barriers to Global South-UK travel. **Budgeting for these costs** is important to promote travel, and visa and passport equity.

Why this consideration is important

Survey respondents highlighted that the **expensive visa application process** (experienced or observed by 83% of Global South partners and 64% by the University of Bristol staff) and **expensive flight tickets** (72% by the Global South partners and 51% by the University of Bristol staff) are two major **causes of visa and passport inequities**.

One of the Global South partners said, “If you translate the amount of money that goes into every visa application, which can be from £100 to £200, it’s much money in the currency where people are coming from.”

What can we do?

- **During grant writing and budget generation**, work with Global South to include the following costs:
 - a. Visa application costs. The UK fees can be viewed [here](#)⁶
 - b. Transport to the visa application centres
 - c. Postage costs (if applicable)
 - d. Flight tickets for agreed travel
 - e. If possible, factor in changes in exchange rates when budgeting for these costs
- Liaise with university finance so that the **visa costs** can be sent to the partners **before visa applications**, or they are promptly reimbursed.

For more information on ensuring equity in budget allocations and spending, see related Equitable Budget Allocation Toolkit [here](#)⁷.

⁶ <https://www.gov.uk/check-uk-visa>

⁷ <https://express-licences.bristol.ac.uk/product/budget-equity>

3. Facilitate documentation to support application



The presence or absence of **proper documentation** can influence visa application outcomes. While some of the documentation required will come from the Global South partner, other documentation will need to come from the UK host.

Why this consideration is important

Visa applications, depending on the country, require tons of documentation.

Survey respondents stated that one of the most experienced or observed visa and passport inequity was **lots of paperwork and justification** (e.g., bank statements, etc.) are required (by 88% and 66% Global South and University of Bristol respondents, respectively).

According to a Global South partner, *“The list of information that the British government required for a 2-day visit, fully sponsored and funded by themselves, was astonishing.”*

The first logical step in preventing a rejection is to **ensure adequate documentation**. Hence, support should be provided to the partner to ensure that all the requirements are met.

What can we do?

- Direct Global South partners to this [website](#)⁸ to **confirm the appropriate visa type** for their trip.
- For UK travel to the Global South, visit this [website](#)⁹ to check country-specific entry requirements.
- Advise partners to **ensure all requested documents meet the specific requirements**.
- **Prepare invitation and support letters for partners** as needed for their visa applications.

See templates of these letters [here](#)⁴

⁴ <https://express-licences.bristol.ac.uk/product/tepso-toolkit>

⁸ <https://www.gov.uk/check-uk-visa>

⁹ <https://www.gov.uk/foreign-travel-advice>

4. Timeliness



Given the uncertainty of visa outcomes, the high costs of flights, and the extensive documentation required, it's crucial to **start the visa application process early. Proper planning and involving Global South partners** in agenda-setting can enhance this process. When choosing the application timing, it's essential to note that passports are often held during processing, limiting travel to other destinations.

Why this consideration is important

Survey respondents recommended planning for visa submission and acceptance timelines in projects (90% and 88% of Global South and University of Bristol respondents, respectively) as a strategy to mitigate the impact of visa and passport inequities.

One University of Bristol respondent suggested, *"Setting timescales and factoring in longer timelines will ensure more time for successful visa applications."*

Given the complexities involved, **early planning** can help avoid delays, secure more affordable flights, and provide ample time to gather necessary documentation, reducing the risk of visa rejections.

What can we do?

- Work with Global South partner to develop **a visa application and flight booking timeline**, ideally at least three months before the planned travel date. Consult this [website](#)¹⁰ for official processing times, although delays may occur.
- **Prepare and share visa application support documentation**, including invitation letters, with partners **well in advance**.

See Guidance for UK institutions when inviting or hosting Global South Visitors and letter templates [here](#)⁴.

⁴ <https://express-licences.bristol.ac.uk/product/tepsa-toolkit>

¹⁰ <https://www.gov.uk/guidance/visa-processing-times-applications-outside-the-uk>

5. Communicate effectively



Beyond communicating about processes, documentation, and University-provided resources, **open and continuous communication** between the visiting partner and the host or host institution is crucial, especially regarding the outcome of visa applications. This includes both positive and negative outcomes.

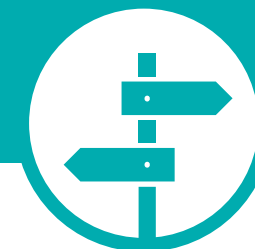
Why this consideration is important

Researchers emphasized the importance of clear communication in resulting to better experiences. Open communication between hosts and visitors fosters a seamless application process.

What can we do?

- **Establish clear and well-defined feedback** channels to discuss application outcomes.
- **Engage with organizers or participants** following the visa application outcome (positive or negative) to discuss potential next steps for the proposed visit, event, or meeting.
- **Avoid making assumptions about participation** following the visa application outcome. If virtual participation is agreed upon, ensure clear communication.

6. Explore buffers and alternatives



It is crucial to have contingency plans given the possibility of unsuccessful visa applications. This consideration describes proposed actions that can be adopted in such instances.

Why this consideration is important

According to survey findings, respondents highlighted the opaque nature of visa decision-making as a significant experience and observation of visa and passport inequity (ranked 88% and 66% by Global South and University of Bristol respondents, respectively).

One Global South partner expressed frustration, stating, *“The process and documentation are extensive, yet rejections can still happen.”*

What can we do?

- **Explore more visa-friendly countries** for research dissemination meetings or multi-country project meetings. Consider using the Campaigns in Global Health Toolkit for Organising More Equitably Accessible Global Health Meetings and [Conferences](#)¹¹ for guidance.
- **If a visa is rejected, use the debriefing guide** [\(see link\)](#)⁴ to determine the best course of action, including whether reapplying is feasible.
- **Consider virtual participation as an option for meetings.** However, avoid defaulting to virtual participation for Global South partners, as in-person participation can be more beneficial, and internet connectivity may be unreliable in some regions.
- **Recognize the emotional toll of the visa application process.** Providing resources for counseling or support can be beneficial for applicants.

4 <https://express-licences.bristol.ac.uk/product/tepso-toolkit>

11 <https://www.cghproject.org/toolkit-equitably-accessible-ghevents2023>



Guide on available resources

The following resources (which are templates that can be adapted based on need and specificity) have been developed to support the visa application process for Global South researchers, access them from this [link](#)⁴:

1. Invitation and support letter templates
2. Debriefing guide
3. Considerations worksheet
4. Accessible location worksheet.

To the right are introductions to the various resources.

1. Invitation and support letter templates

Invitation letters by Global North partners, which detail the type of visa being applied for, the purpose of visits, and funding availability, among other things; and letters of support from Global South partner's institution may be required. Templates that can be used for both letters are provided.

2. Debriefing guide

Following the visa application process, the debriefing guide contains questions that can aid in assessing what was correctly done or otherwise and reflect on if and when a re-application can be made.

3. Considerations worksheet

This worksheet provides questions that can help the researchers carefully reflect the considerations proposed in this toolkit.

4. Accessible location worksheet

This worksheet, designed by the Campaigns in Global Health helps in organising more equitably accessible meetings and conferences, www.cghproject.org/toolkit-equitably-accessible-ghevents2023

⁴ <https://express-licences.bristol.ac.uk/product/tepso-toolkit>

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This toolkit is a 'living document' that we will seek to continuously improve. It is also an open resource - if there is anything that you'd like to see added to it, or if you have any other ideas and suggestions or if you have found it useful ('praise'), please do get in touch via Anthony.manyara@bristol.ac.uk

