

Knowledge Management Approaches to Open Access and Knowledge Equity: Bridging the Digital Divide in South African Higher Education

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Abstract: This paper examines how South African universities are leveraging knowledge management approaches to strengthen open access practices in pursuit of knowledge equity, a challenge that has persistently shaped the participation of the Global South in global scholarly communication. In the South African context, these challenges are intensified by historical inequalities that continue to influence access to information, funding, and infrastructure within higher education. Specifically, this study examines how universities integrate knowledge management strategies to advance equity within their open access initiatives, how knowledge management-informed practices influence institutional capacity to enhance research visibility and foster inclusive scholarly participation, and how South Africa's knowledge management-based open access experiences can inform broader efforts to promote knowledge equity across the Global South. Overall, the findings demonstrate that integrating knowledge management with open access enhances research visibility and impact in South Africa, although disparities in institutional maturity continue to limit equitable outcomes. South Africa's coordinated approach - national collaboration, strategic resource pooling through consortia, investment in local open access systems, and active engagement in global open access discourse - offers valuable lessons for advancing knowledge equity across the Global South. These experiences highlight that sustainable knowledge management-enabled open access ecosystems require both institutional commitment and national-level coordination, fostering inclusive scholarly participation and reducing dependency.

Keywords: Open access, Knowledge management, South African universities, Global South institutions, Scholarly communication, Knowledge equity

1. Introduction

Persistent inequalities in global scholarly communication continue to marginalise higher-education institutions in the Global South and other underrepresented regions, restricting their visibility and participation in scholarship. This weakens the diversity of voices and perspectives in international academic networks, reinforcing existing structural imbalances in influence and access. In South Africa, these imbalances are further perpetuated by historical legacies of apartheid. Disparities in funding, infrastructure gaps, uneven digital access, and educational exclusion continue to influence access and representation in higher education (Dube, 2024). With the rise of Open access (OA), the fault lines of global knowledge equity have become more pronounced. For South Africa and the rest of the Global South, OA practices are not merely abstract policies but urgent mechanisms for equitable access and dissemination of global scholarship. This study examines OA practices adopted by South African higher education institutions (HEIs) through the knowledge management (KM) framework, disclosing how these practices have enhanced knowledge equity. This approach is crucial as it redefines equity as both a normative ideal and a strategic enabler of institutional innovation, resilience, and competitiveness. By situating South Africa's experience within the broader global debates, this study contributes to the international discourse by highlighting the role of KM-enabled OA in advancing knowledge equity within resource-constrained contexts.

This study explores how universities in South Africa are using KM approaches to strengthen OA practices in pursuit of knowledge equity. The following research questions will be addressed:

- In what ways are South African universities implementing KM strategies to promote equity within their OA initiatives?
- How do KM-informed approaches affect a university's ability to enhance research visibility and promote equitable scholarly participation?
- How can South Africa's KM-based OA lessons contribute to advancing knowledge equity in the Global South?

2. Literature Review

This review highlights the existing knowledge inequities in global scholarly communication, discusses the advantages of OA and its various pathways, and explores the KM approaches to OA.

1.1 Knowledge Inequities in Scholarly Communication

The historical legacies of colonialism and unequal distribution of resources continue to marginalise HEIs in the Global South from meaningful participation in scholarly communication (Kutner, 2020). Given that the Global North dominates the publishing industry and that most publishers are based in this region, profit-driven systems are most preferred (Gray, 2021; Alabi, 2025). They chair editorial boards of many leading scholarly publications, have a strong presence in global collaborative research networks and employ English as the primary language for global academic communication (Alabi, 2025). This positions them as major influencers in academic scholarship. In contrast, Global South countries are limited by funding and infrastructure in their ability to compete fairly with the Global North (Dabat et al., 2025). As a result, they rely heavily on the Global North for publishing, which limits their involvement in scholarly participation, reduces their research visibility, and ultimately weakens their bargaining power to influence the direction of scholarship. They face exclusion from knowledge creation and dissemination, perpetuating the Eurocentric legacy in academia of universalising knowledge from the Global North while localising that from the Global South (Torres, 2024).

Global North dominance has yielded them greater representation in high-impact journals and indexing databases. Citation and altmetrics indicators, which reflect how academic work is valued and recognised in academia, show that they receive the highest impact. These are often shaped by knowledge-power imbalances and the location of research (Lazarus, 2025). Recent field-specific evidence shows that about 90% of top-rated journals indexed in Scopus are authored by scholars from the Global North, while less than 10% are from the Global South (Lendvai, 2025). There is a pronounced underrepresentation of Global South scholars from high-impact journals (Longley & Bandara, 2025), presenting them as unequal partners in the creation and dissemination of global scholarship.

The dominance of the Global North in scholarly communication stems from unequal access to the infrastructure that supports digital scholarship. The digital divide has exposed disparities in access to ICT infrastructure, including digital devices, network connectivity, and digital expertise, leading to inequities between the Global North and South. In many cases, technology use in the Global South remains largely participatory, relying on systems and frameworks designed in the Global North. Mammen, Devi and Kumar (2022) interpret this through the dependency theory, which highlights the reliance of Global South countries on more advanced economies for capital and infrastructure. This dependency reinforces existing global inequalities and further marginalises the Global South.

1.2 OA Pathways

OA, defined as ‘digital, online, free of charge, and free of most copyright and licensing restrictions’ (Suber, 2012: 4), has transformed scholarly communication by enabling equitable access and dissemination within academia. By promoting unrestricted use, OA democratises knowledge, fosters a more inclusive and collaborative scholarly environment that enhances the diversity of voices in academic discourse (Tennant et al. 2016, Morgan, 2023). OA has increased access to scholarly content, leading to greater engagement, wider citation, and enhanced research visibility and impact (Tennant et al., 2016). In the context of South Africa, the apartheid era brought systemic inequalities such as unequal funding, infrastructure, and access to information. OA emerged as a response to address these disparities by promoting equitable access to scholarly communication, enhancing the visibility, quality, and relevance of scholarship in the region (Strydom et al., 2022).

Three OA routes, namely, institutional repositories (IRs), gold and diamond OA, have emerged as key pathways for promoting global knowledge equity across both the Global North and South.

Repositories emerged as the earliest, most prevalent, and preferred OA pathway worldwide, primarily due to their cost-effectiveness and their ability to disseminate ideas rapidly. They capture, store and preserve digital research materials created by university researchers, making them available to the global academic community. The Registry of Open Access Repositories (ROAR, 2026) indicates that IRs have expanded to a total of 5,190 worldwide, with Europe having 1,812 repositories and North America 1,0865: both accounting for nearly 56% of the global total. In contrast, Africa has 207 repositories and South America 727, together contributing 18% of total repositories, which represent many repositories in the Global South regions.

The gold OA route is a business model that generates profit through the payment of article processing charges (APCs). Under transformative agreements (TAs), subscription expenditures are repurposed to cover both access and OA publishing, allowing for immediate access to research work. Major publishers such as Springer Nature, Elsevier, Taylor and Francis, Sage, Wiley, and Emerald introduced OA journals or offer OA options

within their existing subscription journals, known as 'hybrid journals' (Sheikh & Richardson, 2023). A benchmarking report on TAs revealed that the Global North has the highest volume of negotiated contracts while the Global South has very few (SCImago, 2025).

The diamond, also known as the platinum OA pathway, represents an economically efficient OA model that imposes no costs either to the reader or the author (Costello, 2019). It is an institutionalised publishing model that is either funded by a university, library, or community. This model is largely adopted in the Global South, where high levels of poverty and low industrialisation prevail (Davis, 2012). About 79% of journals published in this region utilise this model (Langlais, 2024). In contrast, the Global North, characterised by strong economies and high industrialisation (Davis, 2012), favour commercial publishers and is well-positioned to sustain the ecosystem.

The effectiveness of OA pathways is determined by how individual institutions invest in and implement the practices they adopt.

1.3 Integrating KM Approaches to OA

OA alone does not guarantee the visibility or equity of information unless complemented by KM - a deliberate and systematic approach to the creation, storage, dissemination and use of knowledge that brings together people, processes, and technology to support a sustainable and efficient system of information-sharing (Petrides & Nguyen, 2006). It ensures that knowledge is well-organised, easily discoverable and effectively usable. The synergy lies in the fact that OA lays the foundation for equitable access, while KM, through its processes and systems, operationalises this potential by ensuring that knowledge is organised, disseminated and applied in ways that advance equity. KM has the potential to bridge the Global South gap by transforming OA from mere knowledge availability into that which is visible, usable and globally integrated into the global scholarly ecosystem.

2. Findings

OA and KM implementation in South Africa is structurally diverse due to the historical inequalities and resource disparities that exist across universities. The apartheid era entrenched a dual higher education system of well-resourced universities serving the white population and historically disadvantaged institutions serving black communities, which suffered deliberate and sustained underfunding (Bunting, 2006). In the post-apartheid era, the sector underwent substantial transformation through integrating equity, inclusion and social justice principles to address long-standing economic and cultural inequalities (Dabula et al., 2024). The findings below highlight how these structural legacies shape OA and KM to achieve equity.

2.1 KM Implementation Strategies

The findings reveal that at the national level, South Africa facilitates KM from the knowledge creation phase through a structured system led by the National Research Funding (NRF). The NRF provides funding for master's and doctoral studies, postdoctoral fellowships and research grants (South Africa: NRF Act, 1998) and further mandates the deposit of publicly funded research into accredited repositories (NRF, 2015). In parallel, the Department of Higher Education and Training (DHET) has been issuing national Research Agendas since 2014 to guide universities in aligning their knowledge creation activities with national priorities (DHET, 2023). In addition, the Committee of Higher Education Libraries of South Africa (CHELSA) serves as another national platform that supports OA through policy development, advocacy and capacity building. As a representative body, it promotes the active involvement of all universities in OA initiatives (CHELSA, 2021). Collectively, these national mechanisms create an enabling environment for equitable participation in KM processes across HEIs, including the creation, dissemination and use of knowledge, particularly within OA contexts.

At the institutional level, OA infrastructures have been widely adopted across universities. Repository infrastructure for capturing and preserving generated knowledge has been established in all 26 public universities (Malapela, Chisita & Hadebe, 2020), with six institutions operating more than one repository, and others maintaining additional repositories at the faculty, departmental or unit level (ROAR, 2026). Nine universities, including some of the well-resourced universities, have OA policies registered on the Registry of Open Access Repository Mandates and Policies (ROARMAP) (2026), and they serve as strategic instruments to ensure compliance and increase the availability of research outputs in repositories. Twenty-one universities have repositories that are compliant with the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH) (Directory of Open Access Repositories: OpenDOAR, n.d.), enabling the global sharing and discovery of South African scholarship. Furthermore, the development of diamond OA journals has expanded institutional

capacity to locally produce and host OA scholarship, with approximately 28 such journals currently operational (DOAJ, 2026). These OA infrastructures support KM by strengthening the systematic capture, storage and dissemination of research, while advancing equity by reducing barriers to participation in scholarly publishing.

Table 1 lists all the public universities in South Africa and summarises their OA adopted practices. Data was collected between February and April 2026. Data on repositories was obtained from ROAR, TAs from the South African National Library Information Consortium (SANLiC), Diamond OA journals from the Directory of OA Journals (DOAJ), OA policy from (ROARMAP), and national rankings from Webometrics. Universities that have adopted practices that are not captured in these databases and may not be reflected in this study.

Table 1: Open scholarship data - South Africa

University	Number of Repositories	Number of TA contracts	Number of Diamond Journals	OA Policy	Ranking 2026
University of Cape Town (UCT)	2	13	4	1	1
University of the Witwatersrand (WITS)	2	14	1	0	2
University of Pretoria (UP)	2	8	3	1	3
University of Stellenbosch (SU)	2	14	2	1	4
University of Kwazulu-Natal (UKZN)	1	6	0	0	5
University of Johannesburg (UJ)	2	12	9	1	6
University of South Africa (UNISA)	1	14	4	1	7
University of the Western Cape (UWC)	1	10	2	1	8
University of the Free State (UFS)	1	12	3	1	9
Rhodes University (RU)	1	11	0	0	10
Durban University of Technology (DUT)	1	7	0	0	11
North-West University (NWU)		10	0	1	12
Tshwane University of Technology (TUT)	1	11	0	0	13
Cape Peninsula University of Technology (CPUT)	2	9	0	0	14
University of Fort Hare (UFH)	1	11	0	0	15
University of Limpopo (UL)	1	8	1	0	16
Nelson Mandela University (NMU)		12	0	0	17
University of Zululand (UNIZULU)	1	8	0	0	18
University of Venda (UNIVEN)	1	8	0	0	19
Sefako Makgatho Health Sciences University (SMU)	1	5	0	0	20
Vaal University of Technology (VUT)	1	7	0	0	21
Central University of Technology (CUT)	1	4	0	0	22
Walter Sisulu University (WSU)		6	0	0	23
University of Mpumalanga (UMP)	1	2	0	0	24
Mangosuthu University of Technology (MUT)	1	4	0	0	26
Sol Plaatje University (SPU)	1	4	0	0	27

TAs negotiated through SANLiC constitute a key mechanism supporting KM within OA, enabling universities to collectively secure publishing opportunities through hybrid or gold OA pathways (SANLiC, 2026). Grounded in principles of equity and inclusion, particularly for Global South research, SANLiC's transformative framework is oriented towards broadening participation in scholarly communication (SANLiC, 2021), thereby accommodating both well-funded and historically disadvantaged institutions. Sector-wide uptake is evident, with all universities having signed TAs to expand their OA knowledge-sharing pathways. Well-funded universities hold agreements with as many as 14 publishers (SANLiC, 2026), and TAs have contributed to a

substantial increase in OA journal article publications, rising from 829 in 2022 to 5,853 in 2024 (SANLiC, 2025). To date, sixteen publisher contracts have been successfully negotiated on behalf of South African universities, including the big five: Elsevier, Springer Nature, Taylor and Francis, Wiley and Sage (SANLiC, 2026). This demonstrates the impact of TAs in strengthening KM principles and how they contribute to creating an inclusive publishing environment for all universities.

2.2 Research Visibility Through KM

Table 1 indicates that well-resourced universities such as UCT, UP, and SU demonstrate higher KM maturity, reflected in sustained investment in OA infrastructure. These institutions regard knowledge as a strategic asset and engage with multiple OA pathways, such as IRs, hybrid and gold OA journals, to advance scholarship more effectively. Their capacity to support diamond OA journals further demonstrates a strong institutional commitment to openness and enhanced global visibility (DOAJ, 2026). These practices resonate with broader KM-related investments in digital infrastructure, technical expertise, capacity building and structured awareness activities (Shoroma & Bopape, 2023), as well as continued engagement in the OA discourse and advocacy that enhances participation and understanding of OA publishing (Mutsvunguma, 2019). Prior studies have shown that such structured approaches create conditions that foster greater productivity and increase the likelihood of publication in reputable journals (Frantz et al., 2022), thereby strengthening the reach and recognition of scholarship. Consistent with these observations, KM-enabled OA practices contribute to measurable research impact, including high citation rates (Tennant et al., 2016), increased opportunities for collaboration and funding, and greater influence in shaping scholarly agendas.

Analysis of OA platforms such as OpenDOAR, ROARMAP, SANLiC and DOAJ reveal that these universities achieve greater visibility through sustained engagement with OA practices and ensure that their OA pathways are compliant with OAI-PMH for wider visibility. By making research widely accessible, they extend the reach of their scholarship beyond national boundaries and enhance its uptake in strategic decision-making and broader global agendas. This is further supported by Webometrics (2026), which consistently ranks these universities among the top performers in the region in terms of visibility and openness. Overall, the findings demonstrate that integration of KM approaches with OA initiatives enhances research visibility by ensuring that knowledge is systematically organised, widely disseminated, and effectively utilised.

In contrast, limited KM maturity, most evident in historically under-resourced universities, constrains the integration of KM strategies into OA practices (Kruger & Johnson, 2008; Nyirane, 2019), resulting in reduced research visibility. Poor participation in OA signals the absence of a culture that motivates engagement in open scholarship (Kodua-Ntim, 2023; Cox & Trotter, 2016). Evidence presented in Table 1 reinforces this observation, highlighting the widespread absence of OA policies, the existence of only a single repository, the hosting of few or no diamond OA journals, limited TAs and the exclusion of some repositories in global directories such as OpenDOAR. Collectively, these factors reveal significant barriers to the dissemination of research, leaving institutions with limited global presence. Further, the absence of supportive infrastructures undermines the development of a systematic and effective KM ecosystem. It restricts the visibility and circulation of institutional research, resulting in its poor integration into everyday operational practices.

Overall, national coordination has established a baseline level of OA across universities, but knowledge equity remains uneven. Although some universities have shown demonstrable improvements in capacity and performance (Mbaleki & Mbodila, 2022; Mdiya, 2020), systemic imbalances persist as evidenced by the structurally uneven implementation of OA and KM practices, which restricts visibility of scholarship.

2.3 Lessons for the Global South

South African institutions lead in OA adoption among the Global South countries, and a few lessons can be drawn from their approaches:

- The cooperation and alignment of national bodies such as DHET, NRF, SANLiC, and CHELSA have built a unified OA ecosystem that has strengthened policy, infrastructure and capacity for South African scholarship. Such deliberate collaborative approaches ensured that no university is entirely excluded, including under-resourced universities, reinforcing the important role of KM in facilitating inclusive knowledge sharing and participation. Global South countries are encouraged to recognise that strong national collaborative efforts are the basis for building socially justice systems that value OA and equity.
- From a KM perspective, funding remains a major challenge for institutions in the Global South, and joining a library consortium represents a strategic approach to pooling resources and strengthening

collective bargaining power, especially with TAs. Universities in South Africa participate in the SANLiC consortium and have secured contracts with some of the most prestigious international journal publishers. SANLiC has also extended membership to regional institutions such as the University of Botswana and the University of Namibia, fostering the visibility of African scholarship on the global landscape.

- Amongst the Global South countries, South Africa is distinctive in that, from a national level, it has a combination of OA systems that support KM practices of systematic knowledge capture, dissemination and preservation of local scholarly publishing. Nationally, repositories have grown substantially, and diamond OA publishing has gained traction. Global South countries ought to make OA a national priority and invest in local publishing systems to reduce dependency on Global North commercial publishers, avoid contextual misalignment and local community exclusion.
- As a KM strategy, global South institutions are encouraged to actively engage in OA discourse with local, regional and international stakeholders to improve awareness and strengthen their open scholarship practices, as exemplified by some South African universities.

3. Conclusions

This paper examined how OA and KM can strengthen knowledge equity and visibility for HEIs in the Global South, using South Africa as a focal case. The systemic imbalances which identify the Global North from the South continue to prevail in academic scholarship. This study demonstrated that the Global South could strengthen access and dissemination of scholarship by embedding KM principles into OA practices. OA can only achieve visibility and equity if scholarly communication is organised, contextualised, and sustainably integrated into institutional systems. In South Africa, universities that had advanced in their OA practices – developed IRs, had more TA contracts, and hosted some diamond OA journals; also demonstrated the active use of KM approaches through organisational leadership support, adopted OA policies, nurtured a culture of openness, and funded infrastructure development and capacity building. A significant strength was the national-level collaboration, which is a core element of KM. Through collective efforts, all universities in South Africa adopted some form of OA practice. The Global South can incorporate these practices to develop resilient systems that promote equity. Capitalising on diamond OA journals is a strategy that can be adopted to elevate local knowledge, while publishing in international gold and hybrid journals strengthens the global footprint. This approach supports equitable participation and broadens knowledge sharing, while enhancing both contextual relevance and global recognition for Global South scholarship. Implementing OA practices and applying KM principles is a remedy to redress the digital inequities in the Global South, even amid technological and financial constraints. However, differences in institutional digital capacity and inconsistent reporting practices that may result from delays in updating databases such as ROAR, ROARMAP, OpenDOAR and DOAJ, may influence how effectively the study captures gaps related to OA practices and knowledge equity in South Africa. Future studies could employ empirical investigations to gather more extensive data that may address these limitations.

Implications in higher education

OA is positioned as a solution for enhancing research output and visibility, especially in the Global South, yet it presents itself as a high-risk environment for authors who are desperate to publish quickly. Institutions require a new level of strategic intelligence to continue providing OA scholarship that is ethical and credible in this exploitative AI-driven environment.

Embedding KM principles in OA practices is an effective way of maximising the impact and long-term value of knowledge within institutions. While OA focuses on free circulation of scholarly output, the KM lifecycle ensures that the content is structured, discoverable, accessible and can be contextualised. Thus, KM and OA complement each other to achieve knowledge equity, and equity is the key to developing sustainable systems that are adaptive and resilient.

As the Global South strive to close the visibility gap and enhance its presence in global scholarly communication, it must also maintain a balance. Strategic investment in legitimising local knowledge is imperative, given its marginalisation by structural inequities within the global knowledge landscape. Global South should guard against the risk of perpetuating dependency while diminishing local publishing ecosystems. The invisibility of local research to regional consumers has the potential to weaken its capacity to achieve meaningful impact.

Ethics Declaration: This study did not require ethical clearance as it did not involve human participants, personal data, or sensitive information.

AI Declaration: AI tools were used solely for language refinement and grammatical improvements. No AI-generated content was included in the research, analysis, or original writing of this paper.

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