Data Collection - Literature Review

In order to fulfill the demand to provide a baseline tool that sufficiently represents the bandwidth of relevant gender-based needs (GBNs) in the six country contexts and over the period of the last 15 years, the *Typology* is based on an extensive and comprehensive literature review of 406 research articles that were analyzed through an in-depth qualitative abductive and iterative classification process (see Section 5).

Due to the importance of covering the breadth of 'needs', the **data collection** was designed with the goal to reach saturation of areas and dimensions covered in each country context (see detailed explanation below). This means that the data should not be seen as representative in terms of the number of articles on each topic per country but rather as representing the total coverage of topics and approaches in feminist theory over the time horizon under analysis. In other words, we selected for breadth rather than amount by content. Thus, while the number of articles is referenced in the Table below, we refrain from making statistical and quantitative inferences that are based on the frequency of articles per country, but rather focus on deriving the comprehensive baseline entirety of GBNs.

Table 1: Responsibilities and partners for data collection process

PARTNER	TASK	CONTRIBUTORS	N# Articles
UBERN	WP LEAD	Ann-Kathrin Rothermel; Valentina Nerino	n/a
CSS	DATA HUNGARY	Judit Acsády; Lidia Balogh; Veronika Paksi; Alexandra Sipos; Katalin Tardos; Anna Ujlaki	69
RUC	DATA DENMARK	Colm Flaherty; Laura Horn	70
UBERN	DATA UK	Valentina Nerino; Valeria Pisani	66
UBERN	DATA SWITZERLAND	Ann-Kathrin Rothermel	84
UDEUSTO	DATA SPAIN	Edurne Bartolomé-Peral; Steffen Bay Rasmussen, Vincent Druliolle; Ayauzhan Kamatayeva; Carlos Nagore; Mariana Sendra	75
USAAR	DATA GERMANY	Giuseppe Carteny	42

To define the breadth of GBNs in each country context, the leading team of WP1 at UBERN developed a data collection Manual for all partners to ensure a systematic approach across countries. The approach followed a process based on three "Pillars" of data collection:

4.1 Pillar 1: Locating the Literature – Funnel Approach

To locate the relevant areas where GBNs are discussed in regard to the geographical location, the UBERN lead team developed a 'Funnel Approach', which guided contributors through a series of questions and suggestions based on a three-step loop:

The main questions that guided partners in the identification process in **Step 1** were:

- Where is gender discussed *in* the local/national context?
- Where is gender discussed *by* local thinkers/scholars?
- Where is gender discussed *with regard to* the local context?

Through this set of questions, we worked with an encompassing conceptualization of *location* in the sense that the respective geographical context could be represented both as context in which the articles were developed as well as topics covered in the articles.

In **Step 2**, partners were advised to identify concrete web or physical spaces/locations of gender discussions. These could be both physical spaces (institutes, libraries (on- and offline)) and spaces of 'thoughts' (authors, networks, book series etc.) and their associated websites, archives or buildings. The country teams – in the following referred to through the ISO country codes CH (Switzerland), DE (Germany), DK (Denmark), ES (Spain), GB (United Kingdom), HU (Hungary) – conducting the literature reviews took various approaches to narrow down these locations through their own network of scholars (DE; HU; DK), previous meta-literature reviews both from within (DE) as well as beyond the team (DK), and systematic collection through search engines (Google Scholar) (DE, CH, ES), repositories and archives (GB, HU) and web scraping (DE). Searches were conducted in both the local languages and English to ensure relevant coverage across the different types of 'locations'.

In **Step 3**, country teams were advised to reconsider their results for completeness through circular procedures of iteration and triangulation across different types of locations of gender knowledge production (including institutions, outlets, and authors). For example, the DK team adopted an approach from the literature that defines a literature review as "a continuing, open-ended process through which increased understanding of the research area and better understanding of the research problem inform each other" (Boell & Cecez-Kecmanovic, 2010, p. 130). While the country teams chose different orders and priorities for this iterative funneling based on the availability of prior knowledge and resources (such as institutional overview websites, meta-analyses etc.), the encompassing definition of 'location' developed as part of the *Funnel Approach* served to systematize the different approaches to the best possible degree by making sure all types of locations were covered. This also helped to make sure not to overemphasize outliers or prioritize particular locations over others by also explicitly including untypical, potentially less influential locations, such as e.g., "grey" literature and working papers.
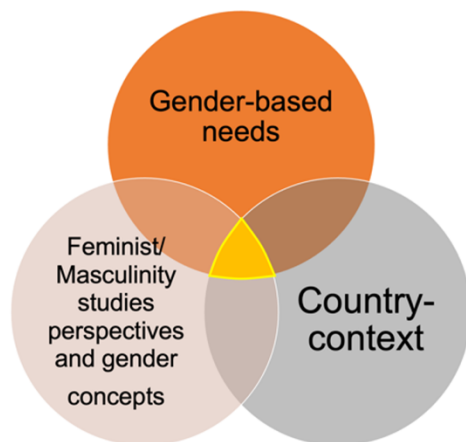
4.2 Pillar 2: Selecting the Literature – Venn Approach

The next step in the literature review was to identify from the locations of 'gender thought' those articles that were relevant to the discussion of GBNs. To do this, the lead team of WP1 developed a Manual to help country teams narrow down the selection of articles in a

systematic way with the goal to reach saturation and cover all relevant GBNs discussed in the local contexts.

Country teams defined first relevant search terms in both their local languages as well as English in order to identify all articles from the locations that explicitly focused on gender. To apply this, teams used the search function (or manually searched those articles that were not available in a digitalized format) for 'gender' (and its respective local translations: Geschlecht – DE, CH; Køn - DK; genre – CH; (társadalmi) nem – HU; género – ES). In addition, country teams could expand the keyword search in cases where the translation of gender did not sufficiently cover the relevant literature. Gender was here understood in line with the gender conceptualization outlined in Section 2 as extending beyond the use of the word as demographic or categorical variable to designate populations as 'men' or 'women'. To center gender in this way, teams were asked to focus on those contributions that consider gender as analytical and theoretical perspective to explain and understand political and social relations and/or phenomena rather than as (binary) variables to designate and disaggregate populations.

Once the initial lists of relevant articles were compiled, country teams followed three selection criteria, developed by the WP leaders through a three-fold focus on gender issues, feminist/masculinities literature, and country-context:

1. **Gender-based needs:**
   → Is the article focusing on gender as an issue that needs to be addressed from a normative/pragmatic perspective; illustrates aspects that are otherwise overlooked?
   → eliminate those that look at gender as a binary variable (male/female) without substantive discussion
2. **Country context:**
   → Does the article speak from/to a local audience OR cover the local context as a topic?
3. **Feminist/Masculinity studies/Gender concepts:**
   → Does the article draw on gender-related theoretical concepts (e.g., intersectionality, gender roles)?
   → Does the article problematize, engage with, or discuss gender hierarchies in a substantive way? (this indicates it being rooted in feminist theory/thought)

Figure 1: Graphical depiction of the 'VENN' approach to article selection, detailing the guiding principles and questions for teams to select relevant articles.
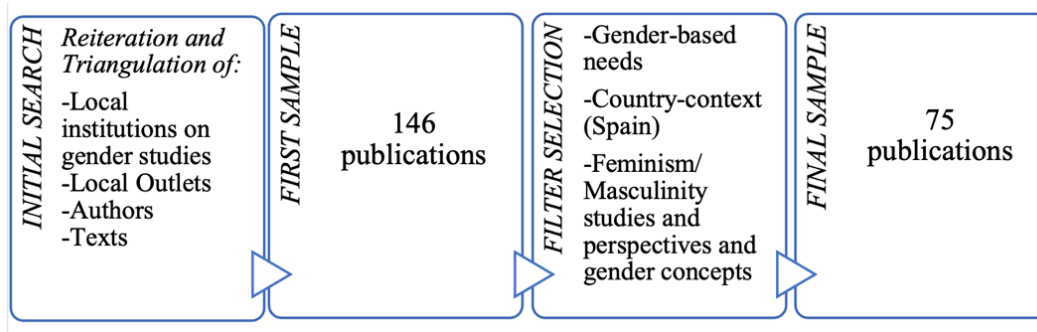
Figure 2: Graphical depiction of the funnel approach to narrow down the literature for the Spanish context (image created by the ES team).

As a final step, country teams were again asked to reiterate and triangulate the approach to reach saturation. The figure below depicts an example designed by the WP leaders that models the iterative and triangulative move through a variety of relevant locations with the goal to reach saturation and avoid selection bias. Country team members reported that through the process of abductive and reiterative classification and expansion of the selection they were able to "obtain a clear overview of research focusing on gender structures and hierarchies [...]" (DK) in their specific country contexts.

Source/Format Scope/Focus	Materials fully dedicated to gender studies (books/ journals)	Authors focusing on / prominent in gender literature	Non-gender specific locations (library repositories etc.) to identify gender content
country-based material (i.e., published in the country of interest)	Example: Gender studies journal published in Spain	Example: British / based in the UK author who is prominent in gender studies	Example: Special issue published in a German sociology journal addressing gender discrimination
International material (i.e., published elsewhere but focusing on the context of interest)	Example: Gender studies journal published in (e.g.) the US focusing on the Swiss system	Example: French author focusing on gender issues in Hungary	Example: Article published in an American economics journal focusing on the maternity leave issue in Denmark

Figure 3: Example triangulation process circling through locations for best saturation practice.

In total all partners collected and analyzed 406 papers. The **full literature list** is available as an annex to this deliverable (Annex 1).

4.3 Pillar 3: Summarizing the Literature

As the final central step of the literature review, the country teams were asked to summarize the articles by uploading the file and respective the meta-data for each selected article in Zotero and filling in a questionnaire about the content of the article in EUSurvey. In addition, the country teams also produced a working paper, which provided a more zoomed-out perspective of the literature review. In the working papers, the teams reflected on the

literature review process and detailed their impressions about relevant background information on the local context and the themes that emerged during the collection process.

The lead team of WP1 provided a Manual (with templates and guidance) that guided the country teams through each of the three steps:

1. Upload and Metadata input in Zotero
2. Questionnaire in EU-Survey
3. Working Paper Summary

Through this three-fold process, we were able to collect a rich information base about both the relevant information on each article as well as relevant background information on differences and overlaps between country selections.

The first two steps were on the article-level with the goal of gathering all relevant **information on each of the collected articles**. In order to systematize and streamline the process, as well as alleviate the burden on country teams, many of the information variables were collected through multiple choice options (e.g., method, type, theoretical approach, actors, etc.). However, since we did not want to presume some of the most central aspects for typology development, we decided to capture most of the article content through open questions, where teams could decide on their own framing depending on the close reading of the articles (gender concept, policy issues, storyline). This served to ensure that the collection process was able to cover the variance of articles across contexts without pre-defining the interpretation of the coders. In addition to the open-input fields, coders from the country teams were free to add information on the multiple-choice options to specify their input and explain if they felt the article's information was not sufficiently covered through the available options.

The variables collected for each article are the following:

Table 2: *Variables collected for each article divided by applicable type and software.*

	INFORMATION COLLECTED	Zotero	EUSurvey
METADATA	Title (in original language and translated to EN)	x	x
	Author(s)	x	x
	Year of Publication	x	
	Language	x	
	Unique ID (following the structure: ISO-Code + Number)	x	x
	Contact person (within country team)	x	x
	Item type (journal article, book, chapter, report etc.)	x	
	Research (empirical, theoretical, mixed)	x	
	Method (qualitative, quantitative)	x	
	Discipline	x	

RESEARCH APPROACH/ CONTEXT	Theoretical approach (Feminist, Masculinity studies, queer studies)		x
	Gender approach (essentialist, constructivist, poststructuralist)		x
ARTICLE CONTENT/ SUMMARY	Abstract (in original language and translated to EN, if not available provide own summary)	x	
	Gender concept		x
	Policy Issues/Themes		x
	Actors/Groups affected		x
	Storyline (root cause, consequences, solutions)		x

The information from the EUSurvey and the paper title from Zotero has been extrapolated and combined into one single dataset will be openly accessible in a .csv file that will be uploaded to Zenodo in March 2024.

In the third step of the working papers, the country teams provided additional information that helped the lead team of WP1 to contextualize the results for all articles in each country context in two regards:

- First, each country team justified and contextualized their chosen selection and summary process in their working papers. This helped the lead team of WP1 to clearly identify areas where teams' approaches differed from one another to better contextualize the results and ensure transparency. For example, while all teams first identified the topics through a first round of collection, which was a necessary step to reach saturation and avoid overrepresentation of specific topics or theoretical approaches, some of the teams focused primarily on the broadest available variety of gender concepts and theoretical approaches (DK; GB; DE), while others prioritized policy issues/themes covered (CH; HU; ES; DE) as first aspects for saturation. Further, the ways in which teams included metadata and context as a focus of the collection process varied. For example, regarding the coverage over time, some prioritized representation of each year in the selection (CH) while others were more focused on varying across disciplines or authors (GB), theoretical traditions (DK, DE), or item type and location (HU).

- Second, in addition to the important contextualization of the selection process itself, teams used the working papers to document important patterns that they had observed throughout their data collection process. While the content-related patterns were further developed in the next step of the analysis, they were important to define the starting points for the subsequent analysis (see 5.2 and 6.1). Moreover, the contextual knowledge of the teams through which they embedded their findings in broader societal dynamics was vital for the WP1 team to better understand and interpret potential divergences between countries whose governments' policies and societal gender norms diverge substantively.