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**Contextualization of qualitative research data
for secondary reuse — a guide
for researchers on the preparation
of a study report**

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Translated and adapted version of the Qualiservice Working
Paper QS-WP-1-2020, status: 2020

Suggested citation:

Heuer, Jan-Ocko; Kretzer, Susanne; Mozygemba, Kati; Huber, Elisabeth; & Hollstein, Betina (2025): *Contextualizing qualitative research data for secondary reuse — a guide for researchers on the preparation of a study report*. QS-WP-7-2025, translated and adapted version of the QS-WP-1-2020, status: 2020, Bremen, <https://doi.org/10.26092/elib/3791>

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Imprint

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1. The contextualization of qualitative research data

The contextualization of qualitative research data for further scientific use is one of the central challenges in *data sharing* (see Medjedović & Witzel, 2010; Corti et al., 2014; Medjedović, 2014). With this guidance document, the Qualiservice Research Data Center would like to support you in contextualizing your research data. On the following pages, you will find recommendations for the description and documentation of your research materials. The focus is on writing a study report that describes your research project, the origin of the data, and the data itself. Section 2 explains the study report in more detail. Section 3 presents a template for writing the study report that can serve as a guide and be adapted to the requirements of your research project. The focus here is on the presentation of qualitative interview studies. Other types of qualitative research data might require more comprehensive adaptations. Qualiservice materials to provide support in presenting other studies are in preparation. As an introduction to the topic, the following section provides an overview of the importance of contextualizing the data and the process of contextualization at Qualiservice.

1.1 The importance of contextualization

Gaining a meaningful understanding of qualitative research materials generally requires considering their context because “only with reference to the context of an action or statement in the broadest sense [...] am I able to understand the meaning of this statement” (Hollstein & Ullrich, 2003, p. 36, translated into English by Qualiservice). However, “context” is an ambiguous term. There is not *just one* context but a variety of institutional, content-related, methodological, and situational contexts that can contribute to the understanding of qualitative research materials. While these contexts are usually directly known or accessible to the people involved in the research project, the subsequent use of qualitative research materials poses the challenge of data use being detached from data generation. The original contexts of creation, justification, and use of the research materials are therefore not directly available to the secondary users but must be provided retrospectively. Contextualization means that you, as the (primary) researcher, present these contexts so that other researchers can reuse the research data.

Contextualization refers to the detailed description and documentation of the course of the research project in order to enable or facilitate subsequent use of the research data.

1.2 Contextualization as part of the research project

Specifically, contextualization means that you describe your research project, the data collection, and the data by means of a study report” and document these using additional contextual materials. If possible, you should start contextualization at an early stage and see it as an ongoing part of your research project. For example, you can already collect materials for contextualization and describe individual parts of the research process during the project itself. This spares you the task of having to recapitulate all the steps at the end of the research project. Many aspects of contextualization are basically steps that any good documentation of a research project requires, be it for a final report or if those analyzing the data were not involved in collecting it. In the latter case, the documented contextual knowledge can already be used within your own research project and passed on to the other researchers involved.

Qualiservice is happy to support and advise you in the contextualization of your research data. Our services include personal support in all matters of contextualization across all phases of your research project – for example, when calculating and applying for the necessary resources for contextualization, writing the study report, and selecting further contextual materials. In addition, we regularly offer workshops and training courses on contextualization and other aspects of data sharing.

1.3 Submission of context materials to Qualiservice

All contextual materials that you consider relevant to understanding your research data can – to the extent permitted by copyright and data protection regulations – be archived at Qualiservice and made available (access-protected) for subsequent use. In this way, we want to account for the fact that contexts can be defined differently depending on the research project, can vary in importance, and can also be documented in different ways. We will of course be happy to advise you on the selection and preparation of contextual materials. In addition, the template for creating a study report presented in section 3 contains a list of possible contextual materials that could be considered for archiving and secondary use. The contextual materials listed there include, for example, applications and reports from the project as well as materials for preparing and conducting the data collection (e.g., an interview guide and postscripts for the individual interviews) and for data analysis (e.g., a category scheme or codebook).

Like the research data itself, you can submit the context materials to us either during the research project or after the project has been completed. Please always use our specially secured “upload space” for the transfer of research data and context materials. Before transferring research data and contextual materials, you will be required to complete a transfer agreement with us. This transfer agreement regulates the modalities of the archiving, provision, and

subsequent use of your research data. There, you can also specify the conditions for the use of the contextual materials.

1.4 Review and processing of context materials by Qualiservice

After you have submitted the context materials to Qualiservice, we process and prepare them for subsequent use. Processing takes place under special security precautions in our “Safe Center.” There, all contextual materials are sorted, checked for content-related aspects as well as personal and other sensitive data, and subjected to appropriate protective measures.

In sorting and preparing the contextual materials, we have found it useful to distinguish between three different levels of context: the context of individual data collection, of the research project, and the historical, regional, or cultural context. This classification is based on the debate on levels of contextualization in qualitative research (cf., e.g., Bishop, 2006; Van den Berg, 2008; Medjedović, 2014) and has been adapted to the practical requirements of archiving and research.

(1) **At the “micro level” of individual data collection** (e.g., an interview or an observation unit), documentation pertains to describe the situational circumstances of the data collection (e.g., through memos or postscripts). These materials blur the boundary between research data and contextual materials, as they provide contextual information on individual data collection that can be very important for data analysis and interpretation, depending on the interests of the user.

(2) This must be distinguished from contextualization **at the level of the research project**. Contextualization at this level takes place, among other things, through the study report and is supplemented, for example, by project applications, reports, or publications. It is also the level for documenting the preparation and implementation of the data collection and the processing and analysis of the data (e.g., interview guide, transcription rules, category schemes).

(3) A possible third level is the documentation of the **historical, regional, or cultural context** of the research project. The presentation of these circumstances is relevant, for example, if the research data have a particular regional specificity or if subsequent use could involve regional comparisons. Another aspect that could play a role here in view of subsequent uses in the distant future is that essential characteristics of the subject area under investigation may have changed by then (e.g., due to the digitization of many areas of life). This type of context can be documented by means of scientific publications (manuals, textbooks, etc.) or practical materials (instructions, information brochures, etc.).

Irrespective of this classification into different levels of contextualization, Qualiservice carries out a check for sensitive content and conducts a data protection impact assessment for all

contextual materials. Specific security and access criteria are defined for the individual contextual materials. Before the final archiving and provision of the contextual materials for subsequent use, Qualiservice will give you the opportunity to check the materials once again and – after clarification of open questions, if necessary – to give your final approval for release.

1.5 Availability of contextual materials for subsequent use

With the exception of the study report explained below, all contextual materials—like the research data itself – are made available only for scientific use and only after users have signed a user agreement. The user agreement contains information on the purpose of use and obliges secondary users to comply with various data protection measures.

As the study report is open accessible, it is usually the first source of information for researchers interested in reusing your research data. This study report will be explained in more detail in the following section.

2. The study report as published contextual material

In the study report, you should describe the structure and course of the research project as precisely as possible, including the collection and further processing of the research data. The study report therefore usually contains information on the institutional background of the research project, the research objectives and research questions, the content-related frame of reference, and the research design of the study. Of course, it is also important to document the modifications and decisions made over the course of the research process as a result of the open nature of qualitative research.

The study report describes the structure and progress of the research project in detail.

The study report is of central importance in the contextualization of your research materials for several reasons: First, it is publicly accessible; second, it gathers important information about the research project, the data collection, and the data; and third, it should also provide references to the other contextual materials. The study report is to a certain extent the “showcase” for the entire research project and all research materials.

The study report is provided with a unique and permanent digital identifier (*digital object identifier/DOI*) by our cooperation partner in the publication of the study report, the State and University Library Bremen (SuUB), and is available via the SuUB’s online catalog. The study report is easily accessible and widely visible via a link to its metadata – that is, to the internationally

standardized and searchable keywords for the research project or the research data. It thus forms an independent publication and is also a central reference for the research project.

The study report is an important publication because it is the “showcase” for your data and an important source of information for those interested in subsequent use.

In view of this function of the study report, we recommend planning sufficient time in the research project for the preparation of the study report and also suggest integrating this component of contextualization into the research process. You might consider writing the study report in English to address a larger scientific user group. This can also be useful if any of the other research materials are available in another language, as translations of these materials can also be produced by the subsequent users if necessary.

Consider whether you would like to write the study report in English to address a wider scientific audience (and possibly encourage translation of the data).

3. Template for the preparation of a study report

Below we present a template for the preparation of a study report. This template is divided into four subject areas:

1. Information on the study and the research context
2. Data generation: preparation and implementation
3. The processing, analysis, and reuse potential of the data
4. Further contextual material on the study and the data

The template is rather general. It is primarily intended to provide orientation and inspiration. The structure and content of the study report must be individually adapted to your research project, preferably in cooperation with Qualiservice. A different organization of the study report may prove particularly useful in the case of research projects that collect several types of data, do so in several “waves,” or at geographically distributed locations.

3.1 Information on the study and the research context

This section addresses the administrative and organizational information about the research project as well as the information on the content-related background, the objectives and questions, the research design, and the course of the study that you should provide. It therefore revolves around the institutional, content-related, and practical research context in which the data and its collection are embedded.

A. Administrative and organizational information

The study report should contain the following information on the administrative and organizational framework of the research project:

- **Title of the research project**; if applicable also a **short title** and **acronym**.
- Its **situatedness** within a framework program, a funding line, or a research network (e.g., a Collaborative Research Center).
- **Names of the project head(s)** and their **institutional affiliation(s)**, ideally including their individual identifiers (**researcher ID**) to facilitate the assignment of publications and research activities (e.g., ORCID-ID: <http://orcid.org>).
- **Researchers involved**, that is, the names of all other researchers involved in the project, if applicable with their institutional affiliation, researcher ID, and the duration of their project work.
- **Cooperation partners**: If the project involved cooperation with persons and institutions, you should name them and explain the nature of the cooperation.
- Information on the **project period** (or funding period); if there are or were several funding periods, you should also state the project status (i.e., if the project has been completed or is still ongoing).
- **Funding**, that is, details of the funding bodies and funding code (or that the project was self-funded, if applicable)
- **Clients**: If the research was commissioned, the clients should be named and, if applicable, the objectives, content, and rights of use explained.

B. Content and structure of the research project

Here you should provide information on the objectives, questions, and approach of the research project. This information can often be found in the project application, interim and final reports, and publications from the project.

- **Research purpose:** What were the **objectives** of the project, and what were the **research questions**? Did these change or evolve over the course of the project, and how did these changes affect the further course of the project (e.g., research design, case selection, data collection, or procedures of analysis)?
- **Research context:** In which **discipline** or **research areas** is the project situated? What is or was the **state of research** to which the project relates? What research gaps, open questions, or **needs for research** were identified in the project application or at the start of the project?
- **Project background:** Were there specific conditions that contributed to the development of and application for the research project? These could be, for example, **similar previous projects** by the researchers or institutions involved, a **practical or political need**, and/or a **call for funding**.
- **Content-related frame of reference:** What was the content-related starting point or framework of the study? Depending on the discipline and project, this could be, for example, ontological and/or epistemological considerations, basic assumptions, traditions of thought, **theories, approaches, models**, explanations, expectations, hypotheses, heuristics, and so on. You should also explain any key **terms and concepts**.
- **Research design:** How was the empirical question of the research project investigated? Which methods of case selection, which methods and instruments of data collection, data processing (e.g., transcription), and data analysis were used and for what reasons?
- **Research process:** How did the actual research process unfold? What were the core steps, and were there any significant modifications or optimizations compared to the original research plan? What were the reasons for these changes, and how did they affect the research project?

To avoid redundancies, you can also keep the information on the research design and the research process very brief or omit it at this point, provided you include this information in the following sections on data generation and data preparation. What is important is that the study report contains as much relevant information as possible on the design and procedure or your decisions in the research process.

3.2 Data generation: preparation and implementation

In this section, you should describe the preparation and implementation of the collection and generation of research data. This is particularly important as this process is rarely described in detail outside of the study report, yet subsequent use of the data is often only possible if the circumstances of data generation can be traced.

A. Selection and description of the actors and/or cases examined

Here you should describe the entirety of the individuals, groups, organizations, and so forth about whom or which data was collected as well as the selection procedure and the examined cases themselves.

- **Subject of the study:** What was the subject of the empirical study? Which aspects were the focus of attention, and how were the study units constructed?
- **Selection procedure/sampling and access to the research field:** What considerations played a role in the selection of the specific units studied? Did the selection principles change over the course of data collection? How was the research field accessed? Did gatekeepers or motivations of the research participants play a role?
- **Legal and ethical aspects:** What legal aspects (e.g., data protection, copyrights) played a role and how were legal requirements (e.g., informed consent) met? Were permissions (e.g., from authorities, organizations) obtained? What aspects of research ethics were considered? Did certain ethics codes play a role, or were ethics votes obtained?
- **Description of the units studied:** How can the study units be described in concrete terms (e.g., organizational or socio-demographic characteristics)? Please always take care to protect the anonymity of individual cases and, if necessary, replace detailed information about individual units (e.g., persons or organizations) with more abstract or aggregated information.

B. Methods, instruments, and process of data generation

This section deals with the methodology and the process of collecting and producing the research data. Please describe the selection of methods, the theoretical and practical preparation of the data collection, and the process of the data collection itself.

- **Description and justification of the survey methodology:** Which methods and procedures were used to collect the data, and why were these chosen? Were there any special features or modifications in the use of these methods and why so?

- **Development and testing of the survey instruments:** Which instruments were used for data collection (e.g., interview guides, observation sheets) and why? How were these instruments developed? Were they tested in advance (e.g., “pretest”) and modified if necessary? Were supplementary materials used (e.g., stimuli such as case vignettes, photos), and how were these developed and used?
- **Personal aspects of the data collection:** How was the data collection organized, and how were the data collectors prepared for the process (e.g., through training)? Were there quality assurance measures for data collection (e.g., instructions for interviewing)?
- **Social and situational aspects of data collection:** How was access to the research field data collection prepared (e.g., preliminary discussions), and under what spatial, temporal, and other situational conditions did the data collection take place? Were there any particular incidents at specific points of data collection? If so, how were they dealt with? Did the circumstances of data collection change and why?

3.3 Processing, analysis, and potential reuse of the data

In this section, you should present the research data generated during the research project as well as its processing and analysis. You can also provide information on possible subsequent uses of the data. We strongly encourage you to do so. As the primary researcher, you know the data best, and your comments in matters of content and methodology as well as your suggestions can be of great help for further research!

A. Data and data preparation

This is where you should describe which data was collected or will be made available for subsequent use and how this data has been processed and prepared. In the case of a study based on interviews, for example, this could be the presentation of the rules for transcription of the audio recordings of the interviews and the measures for anonymization or pseudonymization.

- **Processing/preparation of the “raw data”:** How was the collected data (e.g., audio recordings of interviews) processed and prepared for analysis? What new types of data (e.g., transcripts) were created in the process? What rules were followed (e.g., transcription guidelines) and which instruments used (e.g., computer software)? What were the key steps in processing the data, and were there quality assurance measures (e.g., training of the transcribers, validation of the transcripts)? Were there any particularities or difficulties (e.g., the quality of the audio recordings)?

- **Data protection and anonymization:** How did the researchers ensure that legal and research ethics requirements, such as confidentiality and anonymity, were met? What measures were taken for anonymization or pseudonymization, if any, and according to which guidelines and rules was the data anonymized or pseudonymized?
- **Data corpus for archiving/reuse:** Which research materials are being archived at Qualiservice and made available for scientific reuse? These can be, for example, audio recordings and transcripts of interviews as well as materials to supplement the individual instances of data collection. These latter materials can also be of interest for (further) analysis (e.g., memos, postscripts, or case descriptions). Does this data corpus differ from the data corpus used in the research project, and what are the differences?
- **Further data:** Is there any other data related to the research project that could be relevant to subsequent uses? For example, this could be data from an earlier funding period or an earlier project that was archived at Qualiservice or quantitative data that was archived at another research data center or data repository.

B. Evaluation processes and results

It can also be helpful for subsequent users to gain a better understanding of your research data if you provide an overview of the data analysis and results of your research project. The description can include the following points:

- **Methods of data analysis and substantive approach:** What data was analyzed? Which methods were used to analyze the data? How were the methods adapted and applied if necessary?
- **Organization of data analysis, instruments, and quality criteria:** How was the data analysis organized in terms of personnel and organization (e.g., individual or team analysis, the division of labor, peer validation, research workshops)? Were specific instruments applied to support the analysis (e.g., computer software) and, if so, which ones and how? What quality criteria were applied to the results of the analysis, and how was meeting these requirements monitored (e.g., intercoder reliability, communicative validation)?
- **Key results:** What were the key results of the data analysis or the research project? Did the (initial) results influence the further research process (e.g., give rise to new questions, assumptions, heuristics, concepts)? How are these results to be evaluated, or what can be concluded from these results (e.g., central conclusions, need for further research)? At this point, it may be useful to cite project publications (see below) and comment on them if necessary, to make it easier for subsequent users to refer to them.

C. Notes on the subsequent use of the data

In this section, you can make suggestions for the subsequent use of the data or for the possible collection of additional data. For example, you might address the following points:

- **Potential for reuse:** In which areas (topics, disciplines, etc.) do you see the greatest potential for subsequent use of your research data? For which scientific purposes could the data be of interest now or in the future? What aspects of the data contain information that could not be (sufficiently) investigated in your research project? What other methods could be used to analyze the data and why? Is there other data with which the data from the research project could be usefully combined for subsequent use?
- **Suggestions for further data collection:** Are there any suggestions you would like to make for scientific re-use for example with regard to recontacting the participants for further research (if you have their contact details and consent forms for this)?
- **Third-party guidelines** to be observed: Are there guidelines for handling the research data that must be observed for subsequent use, for instance, codes of conduct from your research institution, professional associations, the funding body or other institutions, or requirements from the research participants?

3.4 Further contextual material on the study and the data

As explained at the beginning, the study report is an important source of contextual information on your research project or data but not the only one. This section deals with references to further contextual materials. These may be materials that you have submitted to Qualiservice or that are available elsewhere (e.g., publications or lecture documents). We will be happy to advise you on the selection of contextual materials suitable for archiving and subsequent use.

Please note the following points: Ideally, you should mention all relevant contextual materials in the study report and briefly explain them as necessary (see the following list). However, you should not include the contextual materials as such in the study report (not even as an appendix) but submit them separately to Qualiservice. Please also ensure that you comply with data protection and copyright regulations. If you have any questions, please do not hesitate to contact us.

The following list contains some examples of further contextual materials, which you should adapt to the circumstances of your research project:

Documents on the research project

- Project application
- Final report

- Interim report(s)
- Additional general presentations/overviews of the research project

Legal and research-ethical preparation of data collection

- Permits (e.g., from authorities, organizations)
- Ethics votes (e.g., from ethics committees)
- Informed consent (e.g., information sheet and blank declaration of consent) or any other legal basis for the processing of personal data

Content and practical preparation of the data collection

- Documents on the object of investigation and case selection
- Documents on the development of the instruments for data collection
- Documents on pretests and revisions of the instruments for data collection
- Documents used to contact gatekeepers (e.g., cover letter)
- Documents used to contact potential research participants (e.g., cover letters, flyers, notices, advertisements)

Implementation of data collection

- Guides (for interviews, focus group, group discussion, etc.)
- Questionnaire (e.g., for socio-demographic information)
- Observation sheet
- Instructions for interviewers, moderators, and so on
- Notes, memos, minutes, postscripts, and so forth

Preparation of the data

- Documentation of the transcription procedure (e.g., rules, manuals)
- Documentation of the anonymization/pseudonymization measures

Analysis of the data

- Schematic representation of the analysis
- Instructions for analysis
- Codebook (coding instructions, category scheme, etc.)

Publications from the project

- List of publications of the research project (if possible, with DOI, ISBN, URL, etc.)
- List of presentations on the research project
- Further research dissemination (e.g., media contributions, events)

Regional, cultural, and historical context of the project

- Sources to illustrate the project context, for instance, for using the data in the distant future (e.g., manuals, information materials, practical documents)

4. Closing remarks

We hope that we have been able to provide you with some guidance and suggestions for contextualizing your research data and creating the study report. We see the archiving and provision of qualitative research data as the result of close cooperation between researchers and Qualiservice and would like to respond to your interests and needs to the greatest possible extent. If you have any questions about contextualization, the study report, or about the archiving, provision, and reuse of research data at Qualiservice in general, please contact us via our website or directly by e-mail: info@qualiservice.org. We will be happy to advise you!

We also welcome feedback on this guide and on your experiences in contextualizing your research materials. Further information and good practice examples on contextualization can also be found on our website at <https://www.qualiservice.org/>.

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About Qualiservice.

Qualiservice is a research data centre that archives and provides qualitative research data from the various fields of the social sciences for scientific re-use. Our services include personalized and study-specific advice, as well as curation and secure processing of research data for re-use and long-term archiving. We also provide research data and relevant contextual information for scientific re-use in research and teaching. Internationally interoperable metadata ensure that all data sets can be searched and found. Persistent identifiers (i.e., digital object identifiers, DOI) guarantee that data and details about the study remain permanently citable.

Qualiservice was accredited by the German Data Forum (RatSWD) in 2019 and adheres to its quality assurance criteria. Qualiservice is committed to the *DFG Guidelines for Safeguarding Good Scientific Practice* and takes into account the *FAIR Guiding Principles for scientific data management and stewardship* as well as the *OECD Principles and Guidelines for Access to Research Data from Public Funding*.

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