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Preparing and documenting ethnographic data for archiving and subsequent use—an overview for researchers

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Content

Preliminary remarks

This working paper is aimed at social and cultural anthropologists, ethnologists, and researchers from other disciplines who work with ethnographic approaches. It provides information on the possibilities of making research data accessible for further use at the Qualiservice Research Data Center and outlines the necessary preparatory steps.[1] Making research data accessible does not mean that it is freely available on the Internet but rather that it can be used by other researchers in research and/or teaching under controlled conditions.

Qualiservice specializes in the appropriate archiving of qualitative and, in particular, sensitive ethnographic data. Archiving primarily involves preserving digital data artifacts in a controlled, secure environment—in contrast to more or less private storage practices for research data that is no longer regularly processed.[2] However, the actual goal of archiving goes beyond this: Research data should not only be preserved but also prepared and made available for further scientific use. The resources for data preservation are therefore justified above all by the intention to make material accessible for further research—regardless of when and to what extent the archived research data is actually reused.

If ethnographic data is to be archived and reused, it cannot simply be handed over to Qualiservice on a hard disk or some other storage device. As you have the best understanding of the potential and the sensitivity of your material, it is necessary that you take preparatory steps in advance. This will ultimately make it easier for others to find and reuse your data. Yet, this can pose challenges even for experienced researchers. This guide intends to provide you with insights into procedures as well as mandatory and optional steps of how to prepare your data for archiving at Qualiservice. It is important to note that all the steps described here can—and often must—be adapted to each specific case.

The necessary steps to prepare your data for archiving should always take into account its possible future use. Qualiservice sees this preparation as a cooperative task (Mozygemba and Kretzer, 2022) between the primary researchers and the research data center. Qualiservice provides guidance on the planning of the necessary steps that the researchers, as experts on

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[1] As part of the Specialised Information Service Social and Cultural Anthropology (FID SKA, DFG funding), the Qualiservice Research Data Center at the University of Bremen and the University Library of Humboldt-Universität zu Berlin have been working together since 2019 to develop appropriate workflows and services for archiving and reusing ethnographic material. The authors would like to thank the members of the FID SKA advisory board and other colleagues—Hansjörg Dilger, Igor Eberhard, Lina Franken, Wolfgang Kraus, Martina Röthl, Birgitt Röttger-Rössler, Franz Templin, and Larissa Vetters in particular—for their advice and constructive criticism.
[2] According to the DFG's Guidelines for Safeguarding Good Scientific Practice, research data should be stored for an appropriate period of time—usually ten years (German Research Foundation, 2022). Institutional services—for instance, repositories of individual research institutions—can also provide support here. However, these are often unable to adequately meet specific requirements—especially with regard to ethnographic data. Long-term archiving beyond ten years can also often not be guaranteed.

their data, must carry out themselves. In some cases, the researchers may have to make these decisions together with their partners in their respective research field. The aim is to integrate all preparatory activities as part of the research to avoid a massive concentration of tasks at the end of the project. Qualiservice supports and accompanies researchers in this process and advises in matters of data protection and research ethics as well as the contextualization and anonymization of research data. After submission to Qualiservice, the data is checked, curated, and made available for further scientific use. As data preparation requires resources, both on part of the research project and at Qualiservice itself, we also offer support in calculating these costs, which can be included early on at the point of project application.

Ideally, you should contact Qualiservice during the project planning and application stage—but of course you are welcome to reach out at any time.

We are aware that ethnographic research does not lend itself to standardization but must rather be conducted in ways specific to the field under the premises of appropriateness, methodological openness, and processuality and in this sense collects specific, largely unique material.[3] With this in mind, the following considerations will probably not be able to offer immediate solutions to all challenges. Rather, we illustrate possibilities and procedures for the documentation and processing of ethnographic data that can be handled and adapted flexibly in individual cases and in cooperation with Qualiservice.

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[3] This is also emphasized by the professional associations of the ethnological disciplines in their position papers on handling research data (see DGEKW/dgv, 2018 and GAA, 2019).

1 Reusing ethnographic data

All data archived at Qualiservice is made available exclusively to researchers for subsequent or secondary use in research and/or teaching. The potential for such uses cannot be fully anticipated. This is also due to the fact that more extensive studies based on a review and re-reading of existing material for new research questions has so far been the exception, at least in the ethnological disciplines.[4] Nevertheless, a variety of scenarios for subsequent use are conceivable: Archived data can be highly relevant to and insightful for new research questions. The analytical content of the rich and complex material gathered through open data collection methods often exceeds the analyses ultimately conducted in primary research. Detailed analyses or time comparisons could be carried out, particularly if the data was not analyzed or only partially used. Reanalyses of data from different research projects or in combination with self-collected data are also conceivable, for example, to draw conclusions across groups or regions. In this sense, archived research data could also be used for broader comparative studies. Secondary analysis of existing research data can also serve as an alternative if access to certain research fields is lacking or limited, if there are insufficient funds for conducting field research, or to counteract potential over-research of specific fields or groups (cf. Hollstein and Strübing 2018: 2). Archived data can furthermore be suitable for addressing epistemological and methodological issues. Reviewing such data can also be beneficial in preparing one's own research project. Data archived at Qualiservice is also made available for teaching purposes. They can be useful in research methodology training and to exemplify issues pertaining to research ethics, data protection, and research documentation (see, e.g., Witzel and Reiter, 2022).

Ethnographic data is closely associated with the researcher. The researcher's physical and sensory experiences, which are so important for ethnographic knowledge production and the person's "epistemic affects" (Stodulka, Selim, and Mattes, 2018) may be documented in "headnotes" (Ottenberg, 1990: 144) but are reflected in the material only to a limited extent.[5] A secondary analysis thus inevitably takes on a different character than the analysis of the originally collected material itself (Simon, 2015). It is therefore all the more important to make research steps as comprehensible as possible and to complement the data with additional information, enable a more comprehensive understanding of how it was generated, document

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[4] One example is the work of Christine Oldörp, who, as part of a secondary analysis of data from the research project "Kultur, Alltag und Wandel der Technik im Spiegel biographischer Erfahrungen der Gegenwart" (Thomas Hengartner, Hans Joachim Schröder, 1999–2001), examined how language and action spaces are negotiated in the question–answer pattern of ethnographic interviews (Oldörp, 2018).

[5] Nevertheless, forms of systematic verbalization are also explicitly recommended, for instance, in the context of an emotion diary (Stodulka, Samia, and Ferdiansyah, 2019). This medium is intended to help researchers become aware of their emotions, affects, and feelings in the research process by recording and describing them as systematically as possible before and during their stay in the field.

special features of the field, difficulties or detours, readjustments or the involvement of different actors in the research process, and the like. This applies regardless of whether the material from a project or study can be made accessible in full or in part and irrespective of whether it is immediately accessible or only after an embargo period (see Section 4, Notes on data submission.

2 Documenting ethnographic data

"Datasets don't speak for themselves" (Lederman, 2016: 261). Documenting empirical research data in a comprehensive manner is an essential prerequisite for any later analysis or reinterpretation. Social and cultural anthropologists who have reanalyzed their own data from a new perspective years after its creation or who have worked with archived ethnographic data themselves also emphasize the importance of comprehensive documentation (cf. Åkerström et al., 2004; Geiger et al., 2010). The documentation should provide sufficient context information to enable subsequent readers to use the data appropriately and evaluate its suitability for their own research.

If ethnographic data is to be used by researchers who were not involved in the field research, then a more technical understanding of data documentation, such as the one suggested by the DFG's checklist for handling research data (DFG, 2021) or the information portal on research data management (forschungsdaten.info),[6] is not sufficient. Rather, the research documentation must also cover the diverse contexts of an observed phenomenon that are inextricably linked to the empirical material (Dilger and Hadolt, 2010) and thus to the contexts of producing that material itself (cf. Kraus and Eberhard, 2022: 192f). In this sense, research documentation is based on procedures of recording (audio, video, photography, note-taking) and saving ethnographic materials in as structured a way as possible during the research process (cf. Fischer and Beer, 2020).

In this respect, documenting data for archiving is not completely new or additional work. Instead, the documentation of perceptions, experiences, and impressions in fieldnotes and memos, field diaries, or conversation and observation protocols is an integral part of the ethnographic process as a matter of course, despite all possible differences in individual practice. This applies similarly to the recording of joint decisions and findings in research groups, which encourages explicating and reflecting on processes of understanding and learning, to visualizations of work processes (e.g., timelines or visual maps), and to work and

project reports. The earlier and more systematically you can integrate forms of documentation into the research process, not least in view of archiving, the less effort will be required for the recapitulation of work steps and decisions later on.

A comparatively new format is the data management plan (DMP), which can support the documentation of the handling of material in the research process.[7] A DMP can also be useful for preparing your data for archiving at Qualiservice because it facilitates taking the necessary precautions and decisions of an organizational, legal, and technical nature at an early stage and documenting these in writing. A DMP is a dynamic (*living*) document and should be continuously updated and adapted in light of the open-ended nature and flexibility of ethnographic research.

2.1 Documentation formats at Qualiservice

Because documentation is so crucial to the understanding of ethnographic material, Qualiservice offers various formats that differ in their function and informational content and that are scaled to different levels. Some of these documentation formats are mandatory while others are optional. We describe what is possible below. The extent to which you document your data or use these individual documentation formats will vary from project to project and depend on the resources available.

The documentation formats also vary in terms of their accessibility and visibility on the Internet. They correspond to an ideal path that allows potential users to gradually familiarize themselves with the data.

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[7] Structured online questionnaires can be used to create a DMP. Further information and links can be found, for instance, at https://www.forschungsdaten.info/themen/informieren-und-planen/datenmanagementplan/ [accessed on 18/12/2025].

	Format	Accessibility	Function
Gradually approaching the research materials	Metadata	Publicly accessible	"Binoculars" to obtain initial rough and formalized information about the data
	Study report	Publicly accessible	"Showcase" for the research project and the data to obtain more detailed information
	Micro-metadata	Accessible after registration	"Magnifying glass" to obtain more detailed information on specific data items (e.g., at the level of individual interview transcripts) in a data collection
	Field report	Accessible with contract of use	"Guide" to navigate the ethnographic data for a deeper understanding, address ethical issues (as the case may be), and obtain sensitive information about the research process
	Research data and additional contextual material	Accessible with contract of use	Depending on their classification, research data and context material can either be downloaded externally or used on site under strictly controlled conditions

Figure 1: Documentation formats at Qualiservice

2.1.1 Metadata

The archived research data is described by detailed metadata to ensure that it can be found and used. Metadata is structured information that describes the archived research data—comparable to information about publications in library catalogs. In this context, "structured" means that general information is recorded in predefined fields, for example, on the type (observation protocol, interview transcript, etc.) and amount of data, the place and time the material was created, and, if applicable, usage restrictions (e.g., embargo periods) and similar.

Metadata is required so that research data can be searched not only in the Qualiservice search portal but also in overarching portals and search engines,[8] both nationally and internationally, as well as across institutions and disciplines. Metadata can be partially or fully multilingual to enhance the findability and visibility of the research data in international contexts.[9]

Compared to the richness of the research data itself, metadata, similar to "binoculars," provide only rough, rudimentary information about a project or a so-called data collection in which

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[8] Data portals such as DataCite allow users to search for data across several repositories. Ethnographic data archived at Qualiservice can also be found, for example, in the subject-specific portal EVIFA of the Specialised Information Service for Social and Cultural Anthropology [accessed on 16/10/2024].

[9] Cf., for instance, the metadata for the study by Hornidge, Anna-Katharina; Barragán-Paladines, María José; Broocks, Anne-Katrin; and Zimmer, Martin (eds.) (2021): Mangroves and Meaning-Making: A mutual relationship over time? Ethnographic Data. Qualiservice, PANGAEA, https://doi.org/10.1594/PANGAEA.929747.

research data are grouped according to different criteria (see Section 3.2, Organizing research data in data collections). At the same time, however, they are the information that people searching for research data come across first. They are publicly accessible, searchable, and provide a first impression of the archived material.

In addition to mandatory metadata, Qualiservice also offers the option to capture additional information. The mandatory metadata essentially comprises general information on an individual study or project, such as the title, an abstract, the research subject, the funding period, and so on. The optional elements offer the opportunity to provide further and more specific information about the project, such as spatial[10] and other temporal details, information on the methodological approach, funding institutions, and so forth.[11] This allows researchers to decide on a case-by-case basis which information can be made publicly accessible in the form of metadata and which might be problematic or too sensitive. Nevertheless, the more comprehensive the freely accessible metadata is, the easier it is to find the data and the more precisely interested researchers can assess the potential of the archived material for their own research in this initial search step.

You will therefore be asked to enter metadata for your data during data transfer. Qualiservice provides a web form[12] for this purpose that contains predefined fields and terms for description but also leaves room for subject- and project-specific information. Qualiservice supports and advises you in creating the metadata, checks the entries, and makes any necessary additions in consultation with you.

As part of the so-called distributed archiving, Qualiservice also offers (virtual) links to datasets in other data centers, for instance, if you have worked with mixed-methods approaches.[13] These links are created in metadata so that the common context of the project and the relationships of the material remain visible.

2.1.2 Study report

In addition to the metadata, the study report serves as a kind of "showcase" (Heuer et al., 2025: 5) that gives interested parties a more precise impression of the type, content, and context of origin of the data archived at Qualiservice and the conditions for subsequent use. If you plan

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[10] If, for example, specific locations are not to be named in the freely accessible metadata, you might consider replacing them by reference to larger territorial units (e.g., states) instead.

[11] The Qualiservice metadata scheme can be found at https://wiki.pangaea.de/wiki/Qualiservice_Data_Model [accessed on 18/12/2025].

[12] https://elib.suub.uni-bremen.de/html/studienmetadaten.htm [accessed on 18/12/2025]

[13] For example, the research data from the mixed-methods study by Achim Goerres et al. (2020) was archived at Qualiservice (qualitative data) and GESIS – Leibniz Institute for the Social Sciences (quantitative data). For the metadata for the qualitative data, see https://doi.org/10.1594/PANGAEA.919342.

to archive research data at Qualiservice, it is essential to prepare a study report. The study report can also be searched as full text in the Qualiservice search portal[14] and thus also contributes to the findability of your data.

The study report will be published on the document server of the State and University Library Bremen as an independent online publication and will be assigned a persistent digital object identifier (DOI). Therefore, only non-sensitive information suitable for publication should be included. In some cases, pseudonymization or anonymization may need to be considered (see Section 3.4, Pseudonymization and anonymization). If this applies, you should ensure that the underlying anonymization concept (see Kretzer, 2013 and Mozygemba and Hollstein, 2026) aligns with the one you used to process the research data itself and any other publications based on it. Study reports can vary in scope and detail (cf., e.g., Broocks, 2021 and Weiß et al., 2022). Qualiservice also recommends publishing as much information as possible in the study report so that interested researchers can get an accurate picture of your data and its potential for subsequent use.

The study report thus also provides a framework for explicitly summarizing key aspects of the research process in a separate publication. Qualiservice supports and advises you individually in the preparation of the study report as well as by providing a guide (Heuer et al., 2025) and an author template.

A study report can contain information on the following points:

- **General information** on the research project, the research subject, and the administrative and organizational framework (e.g., funding program and funding period, affiliation and project management).

- Information on the **objectives and questions** as well as the presentation of the theoretical framework and conceptual definitions of terms.

- Explanations of the **methodological approach**, software, and tools used (e.g., MAXQDA[15] or AntConc[16]); any existing interview guides can be included as an appendix.

- An outline of **field access, data collection, and data analysis**, which ideally should provide insight into how the research was actually conducted (see Figure 2: Orientation questions for ethnographic research approaches)

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[14] https://www.qualiservice.org/de/qsearch.html [accessed on 18/12/2025]
[15] https://www.maxqda.com [accessed on 18/12/2025]
[16] https://www.laurenceanthony.net/software [accessed 18/12/2025]

- **Project-specific information**, such as the presentation of the division of labor within the research team, for example, during data analysis and/or the joint organization and processing of research data and documents.

- Description of and reasons for the **selection of archived data**, references to relations or the internal connection between different materials, references to any non-archived material from the same research context.

- Information on data **processing steps** for subsequent use, for instance, on measures for pseudonymization and anonymization.

- Information on the implementation of **legal requirements** (e.g., informed consent) and, if applicable, information on field-specific **ethical aspects**).

- If the material was created in research collaborations, research networks, and/or international projects, **any special features** should also be described; these may include different legal situations and approval requirements in the countries involved or contractual agreements with partner institutions that had an impact on the research.

- Consideration of the **reuse potential of the material** and the specific requirements for further use.

With regard to ethnographic research approaches, the following and similar questions can provide orientation or serve as suggestions:

- Were protocols/notes written on a daily basis, or were certain situations observed and documented on a recurring basis? In what form, detail, and language were observations noted? Were verbatim expressions mentioned?

- What techniques were used when compiling observation protocols, fieldnotes, field diaries, and creating other materials (e.g., reconstruction of meaning, contrasting, obfuscation)?

- What are the formats of the observation protocols? Are photos, sketches, or other multimodal materials available in addition to text?

- Is your own role as a researcher addressed, e.g., your own body language and behavior, relationship work or emotions, and if so, in what form?

- In which settings and situations were the materials produced?

- How were the interview guides developed, if applicable? Did the interviews deviate from the interview guides and, if so, to what extent and why? Were the interview guides adapted over the course of the study?

- How was the process of obtaining informed consent organized?

- Did the findings lead to adjusting the further research process, e.g., were the research questions or was the research design modified?

Figure 2: Orientation questions for compiling a study report for ethnographic research

2.1.3 Micro-metadata

Micro-metadata provide detailed information on individual files within a data collection (see [Section 3.2, Organizing research data in data collections](#)). Depending on the specific research data, they contain additional information, for example, on the social embeddedness of a specific observation situation (marketplace, patient interview, street festival, etc.) or on research participants (e.g., gender, age, profession). In addition, micro-metadata can be used to record when, where, and by which methods, for example, an observation protocol was created and what content and topics it contains. Micro-metadata can also convey specific file information (e.g., file name and technical format) and—particularly important for retaining the complexity of the research data—information on the relationships between the files (e.g., audio recording and transcript of an interview as well as photos of that interview situation). Accordingly, similar to a "magnifying glass," they can help interested researchers to find data that fit their research interest as much as possible. Micro-metadata can only be viewed by users after prior online registration.[17]

As part of the data transfer, you are asked to create an overview of all data that you send to Qualiservice. In consultation with you, Qualiservice uses this overview to also create micro-metadata. For this purpose, Qualiservice provides a suitable template in table format. To prepare and facilitate this step, Qualiservice recommends regularly maintaining this table throughout the entire research process.

2.1.4 Field report

Depending on the research field and the data to be archived, there will more or less regularly be pieces of information that cannot be made publicly accessible in the metadata or study report, although they may be helpful or even necessary for understanding the research process or the data. To address this, Qualiservice offers the option of archiving such information and notes in a "field report."

Similar to a "signpost," a field report serves to further embed the data and provide orientation for subsequent users. In this sense, it provides additional guidance and assistance for people who wish to use and further process your data. It can also be used to classify field-specific ethical questions—insofar as these details often cannot be presented in the openly accessible study report. A key question to consider might be: What additional information do third parties

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[17] Registration currently takes place via an [online form](#) on the website of the PANGAEA information system [accessed on 18/12/2025], which provides the technical infrastructure for Qualiservice. Upon registration, users can view the micro-metadata of the project in question.

need beyond the metadata, the study report, and any relevant publications to fully understand the data and the specific ways in which you conducted your field research? This goes hand in hand with the attempt to explicate implicit knowledge. This applies in particular to reflections on the researcher's involvement with people, their positionality in the field, as well as corporeal experiences and sensory impressions. Such information is constitutive for the process of generating ethnographic knowledge, yet it can only be represented in data form to a limited extent. Including such information in the field report can be particularly useful if field notes should not or cannot be archived.

If ethical issues, power dynamics, historical contexts, or affective dynamics in the field require that the information density in the publicly accessible documentation formats (metadata and study report) be reduced, this document can be used to share such information. Sensitive information about the researchers themselves (e.g., field research with partners or children, living in the field, and difficulties) may not be publicly accessible but may be made transparent and comprehensible in the field report.

It is up to you to decide whether you want to prepare a field report. Qualiservice deliberately leaves the choice of the specific form, scope, and content of the field report open: The specific form depends on your assessment of the need to provide subsequent users with additional information on the research process. What information is included in the metadata, the study report, or the field report will vary from project to project. Regardless of the specific form, the field report—like the actual research data—will not be freely available on the Internet but only accessible under controlled conditions (see Section 4, Notes on data submission).

2.1.5 Additional contextual material

In addition, you can archive supplementary contextual materials of various kinds that you consider relevant to understanding your research data and make them available for subsequent use. This may include materials that were used to prepare the ethnographic research, such as guides, observation sheets, or documents for contacting potential research participants (e.g., cover letters, flyers, notices, advertisements, any template for the declaration of consent). The archiving of signed declarations of consent is also possible if required and subject to special security precautions. Data created in the course of interpretation and analysis, such as code lists, category schemes, but also case analyses and summaries, may also be suitable for archiving. If export files from computer-aided data analysis software such as MAXQDA or ATLAS.ti[18] are also archived, subsequent users can gain insights into the

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[18] https://atlasti.com/ [accessed on 18/12/2025]

analysis process via memos and coding. If the research data were jointly interpreted in working groups and research workshops, minutes of these meetings can also be archived as supplementary contextual material. This also applies to the documentation of the use of quotations, excerpts, or images for publications and lectures. In addition, documents, materials, or guidelines produced by third parties that are related to your research data in terms of how it was handled and/or the subject matter as well as applications or reports from the project can also make an important contribution to understanding the data—provided that archiving is possible under copyright law.

If you have conducted research with the participation of NGOs, companies, local authorities, or community organizations, you might consider whether agreements on such cooperation or the handling of information and research data, confidentiality agreements, and non-disclosure agreements can also be archived. It is important to note that Qualiservice treats these contextual materials in the same way as the research data itself. Accordingly, they are not publicly accessible and can be archived under special protection and security measures if necessary.

3 Preparing ethnographic data for archiving and subsequent use

The following explanations are intended to give you some initial ideas on how you can think about the archiving and further scientific use of your data and provide insight into the archiving practices at Qualiservice. Further considerations and specific questions about concrete data are often best clarified in individual consultations. Qualiservice will support you in all the preparatory steps.

In principle, all types of ethnographic/qualitative research data can be archived at Qualiservice. As mentioned above, the aim is generally to make this data available for scientific reuse. Options for archiving Internet-based and social media data for subsequent use are currently being explored.[19]

Qualiservice checks whether the **data protection requirements** for processing data and information are sufficiently met. The submission of research data containing personal information (e.g., in sets of photos or video recordings) is possible if the data subjects have

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[19] Many questions in this and other areas have still not been sufficiently clarified. Qualiservice is working together with other research data centers and as part of the NFDI consortium KonsortSWD to continuously improve its services.

given their informed consent to the archiving and further scientific use of their personal data[20] or another legal provision[21] permits this (see Section 3.4, Pseudonymization and anonymization). Informed consent can be given verbally, in writing, or electronically (e.g., by email or a web form). Irrespective of this freedom of form, the written form is generally recommended to fulfill the obligation to provide proof of consent, particularly when it comes to sensitive data (Baumann, Krahn, and Lauber-Rönsberg, 2021: 195). Qualiservice provides GDPR-compliant templates on its website that you can use and adapt to the requirements of your project.[22] If obtaining written consent is not possible or appropriate, it is important that you document the consent in another form.[23] Qualiservice supports researchers in the process of obtaining informed consent by providing individual advice and a guide that explains the ethical and legal background (Kretzer et al., 2020).

It may also be necessary to clarify **copyrights**, especially for material that you have not created yourself or together with people in the research field, such as newspapers, published films, documents, flyers, posters, archive material, and the like. If legal clarification is required, you can contact the relevant offices (data protection officer, legal department, research data management advice centers, etc.) at your university or research institution.

Qualiservice does not currently provide any standardized specifications for **technical file formats** but recommends the use of file formats that allow for further processing in the curation process.[24] If you have made handwritten notes, you can also archive these—in digitized, that is, in scanned form—with Qualiservice.

3.1 Selecting research data for archiving

It is not always possible—nor is it absolutely necessary—to archive all data from a project and make them accessible for subsequent use (see DGSKA, 2019). The selection of data always

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[20] Consent can be obtained at various points in the research process. An overview of the importance and use of informed consent in ethnological (field) research can be found in Huber und Imeri (2021).

[21] For instance, in the context of the so-called balancing of interests (Art. 6 para. 1 lit. f. GDPR).

[22] See https://www.qualiservice.org/en/the-helpdesk/data-protection.html [accessed on 18/12/2025].

[23] This can be done, for example, by recording verbal consent (see Benner and Löhe, 2019). In research practice, it is quite common—and sometimes cannot be implemented in any other way—that, in addition to any official research authorizations required from authorities or institutions, individual persons are informally informed about the purposes and concerns of the research and express their consent, but this cannot be recorded (cf., e.g., Dilger, 2017). It should then be noted separately who gave their consent, when, and for what purpose and what exactly they were informed about.

[24] For example, PDFs should not be transferred to Qualiservice if possible. We recommend TXT, RTF, ODT, or DOCX for text documents; TIFF, JPEG, or JPEG2000 for photos; MPEG-4 or MP4 for videos; WAV or MP3 for audio; and RIS or Bibtex for quotations. During curation, we convert the formats into formats suitable for long-term archiving if necessary. In addition, the evaluation of different technical file formats by the Swiss Coordination Office for the Permanent Archiving of Electronic Records (KOST) is also helpful: https://kost-ceco.ch/cms/kad_main_de.html [accessed on 18/12/2025]. A further evaluation matrix can be found in the wiki of the Research Data Management and Data Preservation Unit of the ETH Library Zurich at https://documentation.library.ethz.ch/display/DD/Archivtaugliche+Dateiformate [accessed on 18/12/2025].

depends on the individual case, but there are some general guidelines that can help you make a decision.

A selection can initially exclude material of poor technical quality (e.g. low resolution "snapshots"). For ethical or legal reasons, it may also be necessary and appropriate to exclude certain documents, individual text passages, or images from the data collection. Personal information about the researchers themselves might also be omitted for certain reasons.

Because ethnographic research most often takes place in close interaction between researchers and research participants, it may be necessary and/or ethically appropriate to involve research participants in decision-making processes regarding the selection and sharing of data (cf. Kraus and Eberhard, 2022: 191). Persons who were involved in the creation or preparation of the data in a special way can be named in the metadata provided that this information does not have to be pseudonymized or anonymized for legal or ethical reasons.

Bear in mind that the selection will have a considerable influence on which reuse scenarios are possible. Selection decisions should ideally be included in the study report, or alternatively in the field report, so that an understanding of the original composition of the research data corpus is made possible. For research data that are not archived, a brief overview and information on the reasons for exclusion should ideally be noted. Qualiservice can provide advice. However, since you as the primary researcher know your data and the circumstances and contexts of your research best, the actual selection decision is up to you.[25]

3.2 Organizing research data in data collections

Ethnographic data are highly complex and heterogeneous. They are heterogeneous in the sense of encompassing a great variety of data types—including observation and conversation protocols, interviews, field notes, photos, films, mappings, and so on—and complex because ethnographic data refer to each other, comment on each other, and expand on and complement each other (Amann and Hirschauer, 1997: 16). It is a particular concern of Qualiservice to preserve this complexity, which can be represented in various ways and documented in varying degrees of detail depending on the specific project context.

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[25] To date, there are no generally agreed-upon criteria or recommendations in ethnology or other disciplines.

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┌──────────────────────────┐      ┌──────────────────────────┐
│       Example 1          │      │       Example 2          │
│    Summarizing data      │      │    Summarizing data      │
│     of the same type     │      │     by place of origin   │
└──────────────────────────┘      └──────────────────────────┘
        │                                  │
        │   ┌──────────────────┐           │   ┌──────────────────┐
        ├───│  Data collection 1│          ├───│  Data collection 1│
        │   │        –          │          │   │        –          │
        │   │   Data type A,    │          │   │  Data from research│
        │   │   e.g., photos    │          │   │    in city A      │
        │   └──────────────────┘           │   └──────────────────┘
        │                                  │
        │   ┌──────────────────┐           │   ┌──────────────────┐
        ├───│  Data collection 2│          ├───│  Data collection 2│
        │   │        –          │          │   │        –          │
        │   │   Data type B,    │          │   │  Data from research│
        │   │   e.g., transcripts│         │   │    in city B      │
        │   └──────────────────┘           │   └──────────────────┘
        │                                  │
        │   ┌──────────────────┐           │   ┌──────────────────┐
        └───│  Data collection 3│          └───│  Data collection 3│
            │        –          │              │        –          │
            │   Data type C,    │              │  Data from research│
            │ e.g., observation │              │    in city C      │
            │    protocols      │              │                   │
            └──────────────────┘              └──────────────────┘
```
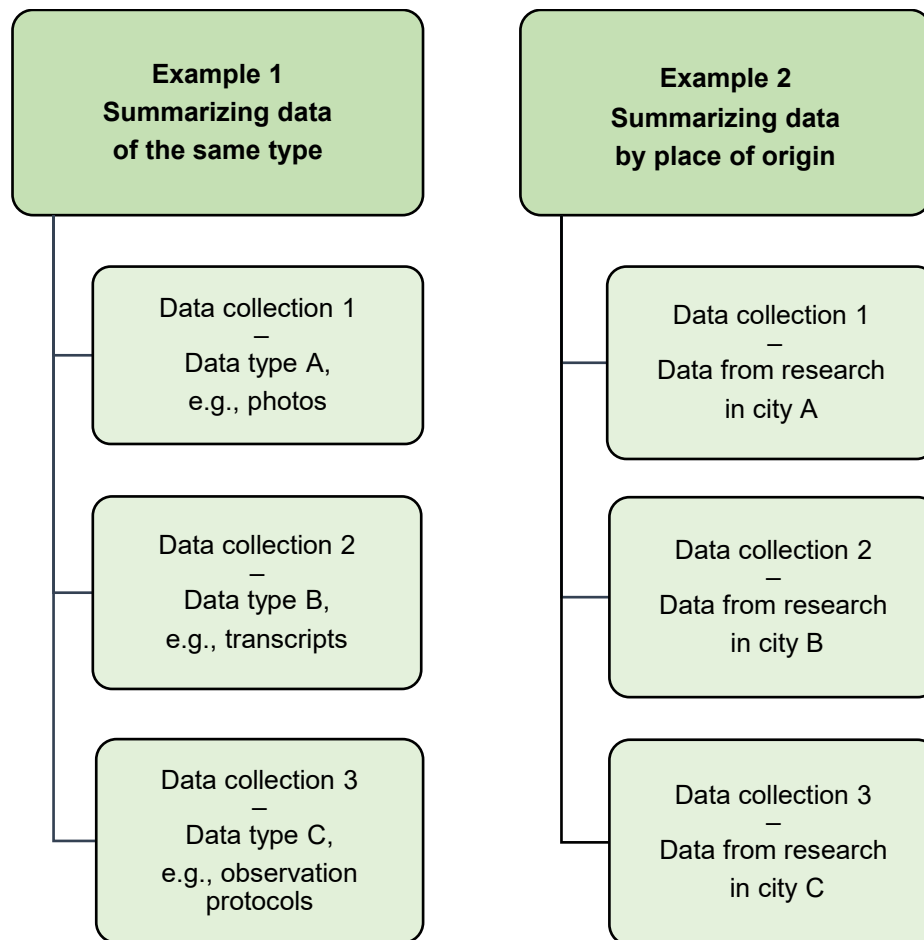
Figure 3: Grouping research data into data collections according to different criteria (example)

An essential element for organizing research materials at Qualiservice are the so-called data collections. For example, research data of the same type can be combined in data collections: interviews into one data collection, observation protocols into another, photos into a third, and so forth. However, data can also be grouped according to other criteria such as place of origin,[26] time of origin, or events in order to preserve the relationships between the data. Data collections are supplemented by the micro-metadata mentioned above, which provide an overview of the content of a data collection.

In general, Qualiservice attempts to apply the order and structure of the data that you have already developed in the research process to the data collections and/or to decide on it together with you. If you have already created an overview of the data during the research process, this will facilitate making the necessary decisions. Qualiservice provides a template

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[26] See for instance, Weiß, Anja; Sommer, Ilka; Chen, Wei; Liu, Tao; Guo, Fan; and Liu, Wenting (2021): Globalizing medical knowledge and practise. Doctor-patient-interaction videoobserved at a university hospital in Beijing (PRChina). Transcripts, translation, audiovisual and context material. PANGAEA: https://doi.org/10.1594/PANGAEA.939235.

for this overview: the table described above (see Section 2.1.3, Micro-metadata), which can be used for various steps in the preparation process.

In the following, we address some aspects and questions that arise when dealing with certain types of data or that may be of particular relevance to the subsequent use of ethnographic data. These explanations should serve as a suggestion of how individual types of data can be prepared for archiving. Depending on the specific data and available resources, the actual implementation will vary from project to project.

3.3 Notes on individual types of research data

Interview transcripts can be enriched with supplementary material, such as postscripts, that can be essential for understanding. Qualiservice does not specify the transcription method but recommends that you document the transcription process. If you pseudonymize or anonymize the interview transcripts (see Section 3.4, Pseudonymization and anonymization), make sure that you proceed as uniformly as possible and document decisions in a comprehensible manner. As a rule, the study report, or alternatively the field report, could be used for this purpose.

Audio recordings can be archived independently, regardless of whether transcriptions of the recorded verbal interactions are also submitted to Qualiservice along with them. Recordings can also document exclusively non-verbal information and acoustic events; it is conceivable, for example, to archive everyday soundscapes that are recorded as part of ethnographic research/sensory ethnography. For a better understanding of the material, it is useful to explain the context in which the recordings were made and their significance in the study report or alternatively in the field report. Particularly in the case of audio recordings that have not been transcribed, it is advisable to archive any time markers and codes generated during the research process in order to facilitate navigation through the recording. If audio recordings contain personal information, they are specially protected by Qualiservice.

Photos and other visual data can also be archived. If photos and images contain personal data and pseudonymization or anonymization cannot be reasonably implemented, they are also specially protected. Qualiservice currently uses the Tropy[27] management program to manage and organize photos. Qualiservice recommends using this free, open-source software to manage photos and visual material, as it enables user-friendly recording of metadata (e.g.,

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[27] https://www.tropy.org [accessed on 18/12/2025]

title, author, date of origin) and easy submission to Qualiservice. To make it easier to understand the data, Tropy allows you to attach notes to photos. These notes can contain further information about the image and how it was created.

Field notes and observation protocols are often created during or immediately after a specific observation situation. You should consider archiving them unless they serve "only" as immediate reminders and contain disorganized notes that are incomprehensible to outsiders. Detailed descriptions are particularly rich material and can ensure a high degree of comprehensibility. It can therefore be useful to take further steps to facilitate the subsequent use of this valuable material in particular. For example, you can mark topics and subject areas or create an index. If appropriate, field notes and observation protocols can also be coded and thus archived in detail.

If you have kept a **field diary**, you may consider archiving it as well. It is well known that what a field diary contains and how it is kept is not clearly defined and depends strongly on individual preferences and specific conditions in the field (cf. Sanjek, 1990). More topic- or method-related notes can be interwoven with more personal reflections, for example, about emotions experienced in the field. We are aware that field diaries are individual and that in many cases the researcher him/herself is prominently present in such a diary. Field diaries can be highly sensitive, especially with regard to the researchers themselves, but can also provide extremely rich and valuable information.

In this respect, it may also make sense to make only parts of the diary accessible or—for example, in the case that diary entries are not easily comprehensible—to consider revisions, smoothing, corrections, or stylistic refinements. It is also possible to flag more personal passages and remove them from the document before archiving. To meet high standards of protection, if necessary, field diaries—like other materials—can also be subjected to an embargo period (see Section 4, Notes on data submission). In this case, they will be accessible for subsequent use only once this period has expired.[28] Corresponding information can be provided in the study report and/or field report if necessary.

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[28] Similar to field diaries, autoethnographic material can also be archived under specific security measures and made available for scientific reuse. See, for example, the following project archived at Qualiservice: Domsel, Maike Maria (2021): "Leben! Freiheit! Gott?!" Die spirituelle Wanderschaft einer Religionslehrerin. Autoethnographische Materialien. https://doi.org/10.1594/PANGAEA.933316.

3.4 Pseudonymization and anonymization

Ethnographic researchers often guarantee their interviewees anonymity to enable a protected, open, and confidential exchange. Pseudonymization and anonymization procedures are therefore of particular importance in implementing ethical principles, especially when it comes to publications: They are intended to protect the research participants and prevent harm by making it impossible or at least highly unlikely to draw conclusions about the persons involved. They are hence also instruments for fulfilling data protection requirements.[29] Accordingly, pseudonymization and anonymization are essential in the preparation of research data for archiving and subsequent use.

So while the aim is to protect research participants, from the point of data reuse it is also essential to preserve as much information as possible that is relevant to subsequent interpretation and thus the informative value of the research data.[30] Accordingly, the need for protection and potential interests in subsequent use must be balanced in each project on a field- and data-specific basis. Researchers usually carry out the necessary steps of pseudonymization or anonymization themselves before handing over the data to Qualiservice. Qualiservice advises and supports you in developing project-specific anonymization concepts. Applying the same anonymization concept across all research data, contextual materials, and documentation formats will help to avoid any re-identification of individuals. Qualiservice offers support with the QualiAnon semi-automated tool for text-based research data (Nicolai et al., 2021; Nicolai and Mozygemba, 2023) and further assistance by providing a guide (Mozygemba and Hollstein, 2026). Specific questions can also be discussed individually. The pseudonymization or anonymization that you have carried out will be checked and, if necessary, completed by Qualiservice after the data transfer.

3.5 Multilingualism in the research data

Ethnographic research often takes place in fields where multiple languages are spoken. It is therefore common for at least some terms, phrases, and idioms to be used in the data that are not immediately comprehensible to researchers unfamiliar with the specific field. In such cases, a list explaining relevant foreign-language terms can aid understanding in subsequent use. If you have written down full descriptions of events, stories, or statements in different languages,

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[29] The GDPR (Recital 26) suggests that data is considered anonymous if it is de facto anonymized, that is, if identifying information about individuals has been removed or changed in such a way that "personal reference can only be restored with disproportionate effort" (RatSWD, 2020, 18, cf. Mozygemba and Hollstein, 2026). Pseudonymization also changes personal information in the data, yet a key file makes it possible to reassign it to a person.

[30] Qualiservice has therefore developed the concept of flexible anonymization, which makes it possible to adjust abstraction levels according to a specific usage request (Kretzer, 2013).

you might consider providing summaries in German or English—especially at particularly important points in the data.

Complete translations are not a prerequisite for archiving at Qualiservice. If information needs to be anonymized/pseudonymized, however, Qualiservice can currently only guarantee an anonymization check for research data available in German and English. Submitting data in other languages requires prior consultation with Qualiservice—as a rule, you yourself must ensure that the anonymization or pseudonymization has been carried out and that all data complies with research ethics and data protection requirements. Qualiservice will assist you with the implementation and is working on further developing appropriate procedures for this.

4 Notes on data submission

Qualiservice sees the archiving and provision of data for subsequent use as a cooperative task between the research data center and the researchers who provide the data. For this reason, forms of access and conditions of reuse are discussed jointly and determined by the data providers.

Before submitting research data, you will be asked to sign a data transfer agreement with Qualiservice. This agreement formally documents the conditions for reuse according to the sensitivity of the data and the corresponding protection requirements, which may vary for specific data items within a data collection. Additional protective precautions can be taken for particularly sensitive or non-anonymizable research data. This can also include, for example, that sensitive data can only be accessed at onsite workstations or, in justified individual cases, only after the data providers have been informed and have given their individual consent. You may also define an embargo period in which your data may be listed in catalogs but cannot (yet) be used by third parties. This can also ensure that you can still process your data exclusively for some time, for instance, when a dissertation relying on this data has not yet been completed. If changed conditions in the field, field relationships, protection requirements, or similar make it necessary, the access and usage conditions defined in the transfer agreement can also be changed at a later date. This could involve, for instance, lifting or extending an embargo period.

Please use only Qualiservice's specially secured upload space for the transfer of all data, regardless of protection requirements. Qualiservice provides access during the transfer process. After you have uploaded your data via a secure connection, it will be processed and carefully curated in a room disconnected from the Internet. Curation involves a series of steps to ensure that the data can be stored and used permanently and that data protection

requirements are met. Among other things, the anonymization or pseudonymization of the entire material is checked and, if necessary, supplemented in consultation with you. Qualiservice does not make any other changes to the data. The extensive curation takes place in our so-called Safe Center onsite, which meets the highest security requirements and is only accessible to the curators. The curation itself is carried out by trained social scientists with experience in qualitative or ethnographic research. Once the curation is complete, you can review the fully prepared dataset (metadata, data collections, material, etc.). Finally, Qualiservice assigns persistent identifiers (DOI), which ensure that the archived data and the study report can be found in the long term.

Before third parties can use your data, Qualiservice concludes [user agreements](#)[31] with would-be data users. These agreements ensure that the data is used in accordance with Qualiservice's terms of use. These terms include, for example, that users refrain from attempting to re-identify individual persons or from publishing entire interview transcripts. Moreover, these agreements can involve deletion deadlines for the data used.

5 Final step: Archiving ethnographic data

Ethnographic data is usually very rich, largely unique data whose analytical potential is often not fully tapped in primary research. In many cases, it therefore has a lasting value beyond the original context and research. Archiving it not only offers the opportunity to analyze such data at a later point in time through new questions and perspectives but also enables the creation of a "new type" of specialist archive for ethnographic data.

Even though the archiving of digital ethnographic data can of course not be made mandatory ([DGEKW, 2018](#); [GAA, 2019](#)), if you do want to archive your data and enable its subsequent use, Qualiservice will provide you with an appropriate technical infrastructure as well as professionally suitable processes and procedures that are flexible with regard to data- and project-specific requirements. Qualiservice archives ethnographic data and makes it available for further use in research and/or teaching under controlled conditions that we define together with you.

This guide is based on the current status of archiving processes at Qualiservice. Qualiservice works continuously—and in close collaboration with researchers—to improve and expand its services. If you are interested in archiving your research data, please get in touch with us!

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[31] Project-specific adjustments can be proposed and agreed on by the data providers.

6 Archiving compact

The following overview[32] briefly summarizes the main areas in which you need to undertake preparatory steps if you wish to archive research data with Qualiservice. Qualiservice will support and advise you in all steps but cannot do the necessary preparatory work for you.

Data sharing as a cooperative task of researchers and the research data center	
The researchers determine which data and supplementary contextual materials are to be archived—if necessary, in consultation with their research partners.	Qualiservice advises on project planning and funding, including the calculation of costs.
The researchers prepare their data (it is essential to obtain informed consent, anonymize/pseudonymize the data if necessary, and document the research steps and data).	Qualiservice offers ongoing advice and support during the research project in order to create suitable conditions for archiving.
The researchers specify in the data submission agreement when and under what conditions their data can be used: research and/or teaching, onsite use, embargo periods, etc.	Qualiservice takes the data and curates it.
The researchers release the fully compiled dataset.	Qualiservice provides the data for subsequent use and makes them visible.
Metadata act as "binoculars" to ensure that your research data can be found (freely accessible)	
The researchers record metadata containing general details and information about the project and the research data.	Qualiservice provides an online form for entering the metadata and checks the entries and completes them if necessary.
Study report as a "showcase" gives a precise impression of the content/scope of the archived data (freely accessible)	
The researchers prepare a study report.	Qualiservice provides individual support and advice in the preparation of the study report as well as a guide for doing so (Heuer et al., 2025) along with examples of good practice.
Micro-metadata function as a "magnifying glass" to provide information on individual data within a data collection (accessible after registration)	

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[32] Edit icon created by zafdesign, https://www.flaticon.com/de/kostenloses-icon/bearbeiten_4803228 [accessed on 18/12/2025]. Archive icon created by Kiranshastry, https://www.flaticon.com/de/kostenloses-icon/archiv_711729 [accessed 18/12/2025].

The researchers prepare a data overview that they submit to Qualiservice.	Qualiservice provides a template in table format and uses it to create the micro-metadata. The overview also serves as a basis for organizing the research data in data columns.
Field report serves as an additional "guide" and contains, e.g., sensitive information on the research process (accessible with user contract)	
The researchers create an optional field report.	Qualiservice provides individual support and advice in the preparation of the field report.
Data protection requirements	
The researchers submit the documentation of the research participants' consent for the archiving and scientific reuse of the data that concerns them.	Qualiservice checks whether requirements for the processing of data and information are met and provides support in the form of individual advice and a guide (Kretzer et al., 2020) and provides customizable GDPR-compliant templates for consent.
Pseudonymization and anonymization should make it impossible or highly unlikely to draw conclusions about individual research participants	
The researchers develop a concept of pseudonymization or anonymization and carry out the corresponding steps themselves throughout the data.	Qualiservice provides support with individual advice, a guide (Mozygemba and Hollstein, 2026), and the QualiAnon anonymization tool. Qualiservice checks the pseudonymization or anonymization after the data transfer and supplements it if necessary.

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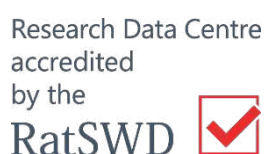
About Qualiservice.

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*.

Qualiservice-Partner:

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GESIS Leibniz Institute
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KonsortSWD
NFDI4Society

Qualidata
Network

EVIFA
FACHPORTAL ETHNOLOGIE
Specialised Information Service for Social
and Cultural Anthropology (FID SKA)

POLLUX
Specialised Information Service
(FID) Political Science - Pollux

UNIVERSITÄTSBIBLIOTHEK
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INSTITUT FÜR KRIMINOLOGIE
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Service (FID) Criminology

DR|EX
Data portal for Racism and
Right-Wing Extremism Research
(DP-R|EX)

SocioHub
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(FID) Sociology - SocioHub

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