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METHODS FORUM

The CLEAR-Qual Framework: Guidelines for Open Qualitative L2 Research

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Abstract

While the movement toward open science (OS) has gained substantial traction among quantitative inquiries, qualitative research, particularly in second language (L2) contexts, remains underrepresented. L2 qualitative research is characterized by complex, multimodal, multilayered, and contextually situated linguistic and non-linguistic data; yet existing openness debates underplay the ethical and relational dimensions essential to this inquiry. In response, this paper introduces guidelines on conducting L2 ethical and accountable research in qualitative contexts (CLEAR-Qual), the first practitioner-informed, phase-by-phase framework designed to operationalize openness for L2 qualitative work as an ethical, reflexive, and collaborative stance rather than an all-or-nothing technical fix.

Developed using the Delphi method, CLEAR-Qual distinguishes openness *on* research (i.e., outward reporting) from openness *with* research (i.e., processual, participant-centered practices) and aligns OS principles with the contextual, emergent nature of qualitative second language research. The framework articulates core and advisory practices across five phases (pre-study, data collection, analysis, reporting, and post-study). Key recommendations include preregistration, tiered consent acquisition, rigorous anonymization, reflexive documentation, knowledge co-creation, secure data management, and ethical data-use agreements for secondary access. By situating accountability at the center of the research process, CLEAR-Qual provides actionable guidelines for researchers, reviewers, and editors committed to transparent, ethically robust qualitative research in L2 contexts.

Keywords: guidelines; L2 research; methodology; open science; qualitative research

"Any qualitative researcher who is not asleep ponders moral and ethical questions" (Miles & Huberman, 1994, p. 288).

Qualitative research, as with all forms of scientific inquiry, is never simply a technical exercise; it is inherently bound to the values, judgments, and responsibilities of those

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undertaking it. Denzin and Lincoln's (2005, p. 10) observation, "qualitative research is many things to many people," remains a testament to the flexibility and diversity of such studies. Despite this plurality, the field is also defined by academic rigor: "research is disciplined inquiry" (Dörnyei, 2007, p. 15). What emerges, then, is a field of simultaneously expansive yet exacting scrutiny, with methods, data, and analyses grounded in context, meaning, and interpretation.

Despite its popularity across the social sciences, qualitative research resists a singular, universally accepted definition (Aspers & Corte, 2021). Concerns about whether it can be regarded as objective or generalizable, or if it risks being overly subjective, unstructured, or anecdotal, have long existed. Such debates prompt reflection on whether Holliday's (2004, p. 731) assertion still resonates after two decades of scholarly work: is it true that "boundaries in current qualitative research are [still] crumbling, and researchers are increasingly doing whatever they can to find out what they want"?

Thoughtful inquiry repudiates this apparent looseness, as qualitative studies are now widely argued to be grounded, systematic, reflexive, and principled (Denzin & Lincoln, 2005; Tracy, 2010). Besides, scholars have emphasized that qualitative research, like any other systematic study, must be evaluated using robust criteria, including (but not limited to) trustworthiness through credibility, transferability, confirmability, authenticity, and dependability (Guba, 1981; Guba & Lincoln, 1989; Lim, 2025).

Such recognition of the qualitative approach, more often than not, eludes many second language (L2) research contexts. Although linguists have adopted qualitative inquiries since the 1990s (Dörnyei, 2007), there remains a pressing need for procedural rigor and accountability in L2 qualitative contexts (Shohamy, 2004). While the broader field has moved toward systematic approaches, a significant portion of L2 qualitative studies still fall short in attending to core evaluative criteria. For instance, Riazi, Rezvani, and Ghanbar (2023) reviewed 43 qualitative studies in L2 writing and found that concepts of quality and rigor were frequently left unaddressed. Despite theoretical advancements, more than half of the reviewed studies remained vague in their descriptions of the methodologies employed and struggled to demonstrate how claims were grounded in data. Similar issues also surfaced decades ago in cross-linguistic qualitative research. Squires (2009) reviewed 40 studies in the field and identified several methodological inconsistencies, including a lack of clarity regarding translation decisions and insufficient transparency about how data were analyzed.

The call for rigor and accountability emerges alongside a growing momentum toward open science (OS). This introduces both opportunities and tensions for L2 qualitative researchers. On the one hand, openness promises to enhance accountability, and on the other, it calls for practices such as data sharing or replicability that rest on assumptions that scholars argue do not clearly map onto qualitative epistemologies that respect the contextual, iterative, and emergent nature of qualitative research (see Chauvette, Schick-Makaroff, & Molzahn, 2019). Thus, several procedural dilemmas arise: What does it mean to *open* data that is inseparable from the researcher-participant relationship? How can researchers disclose *enough* without breaching confidentiality or trust? Given the multimodal, multilayered, and multidimensional nature of language research (discussed further in the section *Openness in and with L2 Research*), how does openness apply to and for qualitative L2 contexts?

Thus, a direction that respects the principles of OS and the particularities of qualitative inquiry in L2 settings is needed. In the sections that follow, we aim to introduce OS into the domain of qualitative and L2 research and to develop a phased

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framework to assist researchers in making informed decisions at different stages of second language qualitative research. Rather than advocating a pastiche of standards from quantitative research, the ultimate goal here is to uphold open research that values the reflexivity, depth, and sensitivity that are distinctive to L2 qualitative research.

Openness in qualitative research

The is and isn't

Any attempts to define openness in qualitative research must begin by unsettling the assumption that openness simply involves making everything visible. In practice, openness cannot be reduced merely to transparency, nor can it be an *all-or-nothing* approach that is satisfied by uploading the materials, transcripts, or protocols online. Such practices might (in)advertently overlook the complex, relational nature of qualitative inquiry. Besides, this view risks reinforcing research as neutral, procedural, and universally reproducible, all of which stand as tensions within the foundations of the qualitative approach. Such tensions become further apparent when associating openness with replicability. Qualitative researchers have long argued whether replication, in its narrowest sense, is even relevant or possible (Makel et al., 2022; Pownall, 2024; Tuval-Mashiach, 2017). As Pownall (2024, p. 106) asks, "Can any study that attempts to 'recreate' this approach ever, really, be considered a true 'replication'?". The question is rhetorical, but it points to a critical concern: qualitative research is rooted in specificity and is emergent from collaborative knowledge creation among the researcher, the research, and the participant (not ordinal but iterative).

Campbell et al. (2023, p. 2) further clarify this perspective: "there is no expectation that a different analyst would necessarily interpret data the same way or that another researcher pursuing the same or similar research questions in another setting would obtain the same results." What is more useful, therefore, is a shift in focus; instead of demanding sameness, qualitative openness calls for clarity "so that diverse stakeholder audiences can understand their research" (Campbell et al., 2023, p. 2). Researchers across paradigms are expected to make clear how decisions were made, what was prioritized, and under what circumstances the research took place, not as a claim to neutral or universally reproducible procedures, but as a way of making the reasoning and context of the study visible to readers. Such openness does not erase complexity but renders it legible, positioning openness as a component of broader accountability and contextual understanding (Caelli, Ray, & Mill, 2003).

Another important tension exists in the conflict between openness and confidentiality (Khalil, Shinwari, & Islam, 2022). In this regard, one major concern raised is the potential violation of the ethical principle of privacy, particularly for uninformed or non-consenting individuals and communities. However, considerations of data deposition of uninformed participants can be called a naïve approach to OS, as it is misleading to assume that OS entails breaches of privacy. Instead, ethical OS practices emphasize the necessity of obtaining informed consent when data are intended to be shared or reused in future research. Furthermore, responsible data sharing involves robust anonymization and remediation procedures to protect participant identities. For instance, Campbell et al. (2023) recommend both automated and manual de-identification strategies that incorporate natural language processing, data blurring, categorization, redaction, and bracketing techniques. Complementing these approaches, the Qualitative Data Repository has also developed comprehensive guidelines for de-

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identifying and archiving narrative data (Demgenski et al., 2021), ensuring that openness can coexist with ethical rigor and participant confidentiality.

Yet another tension arises between flexibility and standardization. The introduction of concepts such as preregistration in qualitative contexts might superficially look like attempts to flatten the iterative nature of qualitative data collection techniques. However, as Al-Hoorie et al. (2024) suggest, preregistration can outline the provisional plans while leaving space for field-specific modifications, thereby serving as a scaffold rather than a script. When such modifications are openly acknowledged, flexibility doesn't compromise openness or rigor; rather, it enhances trustworthiness.

Considering that openness is never unidimensional, it calls for a more nuanced understanding: one that resists being totalized by a single metric. Openness in qualitative research, therefore, includes *processual* (as against procedural) transparency[1] (e.g., how and why the research unfolded in a particular way?) and *relational* transparency (e.g., how were participants involved in shaping meanings?), as well as *ethical* transparency (e.g., how confidentiality, consent, and power were considered?). Each of these invites a different kind of accountability, and each of these responds to a different yet equally important aspect of the research process.

Parenthetically, openness in qualitative contexts has several epistemic and practical benefits beyond enhancing accountability. It allows researchers to understand *how* conclusions were reached (Braun & Clarke, 2019; Tracy, 2010). Such openness supports methodological learning and knowledge building/sharing; it also helps identify divergences in interpretation (instead of treating them as errors). Moreover, transparency across all the stages of qualitative inquiry, from decision-making to post-hoc communal reciprocity, can help prevent selective reporting and develop trustworthiness and credibility. In this sense, openness in the qualitative paradigm, while not in pursuit of identical results, enables auditability by making rationales, logic, and interpretation visible and contestable.

Importantly, openness doesn't emerge in a vacuum. It is influenced by the theoretical and epistemological stance of the research. For instance, a constructivist approach, as foregrounding reflexivity and knowledge co-construction, might involve documenting interpretive decisions, sharing emergent analyses with participants, or situating the researcher's positionality as a part of the knowledge-making process (Cronin, 2019). A critical paradigm, on the other hand, demands transparency about whose voices are (n't) represented (Wodak & Meyer, 2001); openness, here, must serve not only clarity but also the social and ideological structures of the field. Meanwhile, post-structuralist approaches might encourage openness to be treated as an invitation to interpretation, rather than as finality in meaning (Williams, 2014).

Taken together, these paradigmatic nuances point toward openness being epistemological; thus, OS becomes not a way of *doing* but a way of *knowing* and *sharing*. OS, therefore, views qualitative research as partial, situated, and relational. Taken from this perspective, openness does not mean revealing everything. It means acknowledging what can(not) be known and why, what the limits of research are, and what ethical aspects are at stake (Berger, 2015).

[1]Drawing on Huvila and Sinnamon's (2022) discussion on how researchers share information about research design, methods, and process, procedural transparency can be understood as openness about the concrete steps and techniques of a study (what was done and how), whereas processual transparency refers to openness about the evolving, situated, and interpretive aspects of research (how and why the research unfolded in a particular way). In this sense, procedural emphasizes replicability and documentation, whereas processual emphasizes reflexivity and contextual understanding.

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Openness on and with

To understand the layered nature of openness in qualitative contexts, it is helpful to distinguish between openness *on* and openness *with* research, representing different ethical positions toward inquiry.

Openness *on* research refers to an outward-facing commitment; the act of making decisions transparent to external stakeholders such as reviewers, editors, funders, or the broader academic community (see discussions on reporting by Bringer, Johnston, & Brackenridge, 2004; O'Brien et al., 2014; Tong, Sainsbury, & Craig, 2007). Although these practices maximize clarity, they are usually unidirectional [researcher → public], performed post-facto, and shaped by institutional or journalistic standards of accountability. They represent an objective dissemination logic: here is what was done, and here is why it matters. Such versions of openness, although not without value, reassert hierarchies between the knowledge-holder and the knowledge-seeker, with the former deciding what to (not) share with the latter.

In contrast to this, we propose an openness *with* framework that comprises three levels. The first level, openness *with research,* refers to the transparent and reflexive addressal of the assumptions, decisions, and interpretations that surround the research process [researcher ↔ research] (Berger, 2015). Second, openness *with participants* requires treating people not as data sources but as co-creators of knowledge [researcher ↔ participants], thereby valuing the interpretive authority and agency of participants through strategies such as informed consent, participant feedback, and information verification (Creswell, 2012; Tamminen et al., 2021). Finally, openness *with communities* involves opening up the very materials of inquiry (e.g., research plans, procedures, codebooks, and other remediated data) along with the products of inquiry (e.g., plain-language summaries, analytic outputs, and actionable policy briefs) through appendices, supplementary materials, and/or accessible repositories such that these resources are discoverable and usable for researchers, public audiences, community partners, and other stakeholders [researcher ↔ communities] (Campbell et al., 2023).

The parable of the six blind men and the elephant is a useful metaphor for clarity and rigor in the qualitative domain here (Daigneault, 2013). Each man touches a different part of an elephant and draws a different conclusion about its nature. None is entirely wrong, but none has the full picture. Here, what the parable tells us is not only about the partiality of perception due to incomplete information but also the necessity of dialogue. If each man were to share, transparently, about their understanding with others, a more comprehensive picture might have emerged. Similarly, in qualitative studies, when researchers engage *with*, rather than simply report *on* their investigation, findings move from declarative to accountable (Steltenpohl et al., 2023; Tuval-Mashiach, 2017).

Openness in and with L2 research

Within L2 qualitative research, studies have examined learners' lived experiences, linguistic identities, affective dimensions, communicative strategies, and the sociocultural, material, and multimodal contexts that shape language use and/or acquisition (Dörnyei, 2007; Ortega, 2014; Pavlenko & Lantolf, 2000). Such research is characterized by its unique situatedness, the diversity of its methods, and the multidimensional and multilayered nature of its data.

Researchers enter classrooms, homes, online communities, and other sites of language use to understand not only what is said or written but also how and in what

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context it is said. To document this, L2 researchers draw on a range of data sources, including, but not limited to, learner, teacher, and parent diaries; study logs; reflective blogs/vlogs; language-related episodes; progress charts and maps; mind maps; learner-generated records; and several other forms of input, ranging from interviews to field notes and observations (Griffee, 2018; Ortega, 2014). These sources are multidimensional; they often provide information from different data points, which are then compared and contrasted to understand the field. Such data are multilayered; researchers must decide whether to use language itself as data (e.g., analyzing the structure, meaning, or patterns through a particular lens), use language-related features within the data (e.g., measuring fluency or accuracy), or combine both approaches (Mackey & Gass, 2021). Finally, data is often multimodal in nature, with aspects such as visual, verbal, and non-verbal communication, phonetic and discourse markers, and pauses and hesitations (Paltridge & Phakiti, 2015).

For example, a study on immigrant high school students learning English in a multilingual urban classroom might examine how they negotiate identity through teacher-mediated and peer interactions. The researcher might use audio/video recordings of classes (multimodal), student interviews (multimodal, multidimensional, multilayered), learning journals (multilayered), and teacher field notes and classroom observations (multidimensional) to capture how language is used, embodied, and reflected upon across contexts. Such methods of combining data sources are common in L2 contexts. However, in practice, although analysts draw on multiple inputs, the strategies, methodological decisions, rationales, or triangulation techniques employed are too frequently underreported or described only in passing (Riazi et al., 2023; Squires, 2009).

Openness in such contexts calls for detailed, reflexive accounts of methodological and analytical decisions. As discussed in the previous section, the three layers of *openness with* are especially relevant in L2 contexts. Firstly, *openness with research* in L2 contexts means reflexively documenting every methodological choice and interpretive turn. For instance, the illustrative case discussed above (immigrant learners) might preregister its initial research plan with a relevant journal, then log and justify the in-field adaptations (e.g., shifting from semi-structured to narrative prompts when students' journals reveal unexpected themes). Secondly, *openness with participants* treats learners as co-creators; thus, the researchers return to learners to clarify the ambiguities identified in the data. Finally, *openness with communities* calls for depositing not only the final report but also codebooks, analytic memos, and transcription conventions; the researchers, here, after taking due consent from all the participants, deposit anonymized and remediated excerpts into repositories to enable peer critique, replication of analytic logic, and the cumulative refinement of research methods.

At present, a growing number of language journals encourage OS practices. Open Practice badges, for instance, appear in journals partnered with the Centre for Open Science, and preregistration or registered reports are invited and encouraged by journals such as *Studies in Second Language Acquisition, Language Learning, Language and Speech, Bilingualism: Language and Cognition*, and *Journal of Child Language Acquisition* (Al-Hoorie et al., 2024). Besides, domain-specific repositories such as Instruments and Data for Research in Language Studies (IRIS) and general platforms such as the Open Science Framework (OSF) help researchers archive transcripts, coding schemes, interview guides, protocols, and related materials.

Despite these, uptake of OS practices remains uneven; many researchers engage with OS only when prompted by journal/funder requirements, and cite concerns about confidentiality, ethics, the lack of mandatory policies, or a lack of knowledge (Ollé et al.,

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2023; Zuiderwijk, Shinde, & Jeng, 2020). Therefore, we seek to offer the first systematic, phase-by-phase guidelines for open qualitative research in second language studies. Through this framework, we aim to combine the depth of L2 inquiry, the reflexivity of qualitative research, and the accountability and clarity of OS practices. Importantly, since many issues of transparency and openness extend beyond method-specific boundaries, instead of grounding the framework in any single qualitative methodology, we adopt a broad interpretive orientation that accommodates the diverse approaches of second language qualitative research. Accordingly, the guidelines focus on openness across research phases and provide actionable recommendations for planning, data collection, analysis, reporting, and dissemination of qualitative studies in second language contexts.[2]

The CLEAR-Qual framework

Developing the guidelines

To develop and ground guidelines in real-world experiences and established OS practices, we adopted a practitioner-informed approach to the CLEAR-Qual (i.e., Conducting L2 Ethical and Accountable Research) Framework. The Delphi method was employed to gather, refine, and validate expert consensus on best practices for the research process. This is a structured, iterative technique that collects and refines expert opinions over multiple rounds until consensus is reached (Hasson, Keeney, & McKenna, 2000; Linstone & Turoff, 1975). As Sterling et al. (2023) illustrate, the process is somewhat like a group of friends trying to agree on a dinner time, wherein ideas are proposed, feedback is gathered, and revisions continue until most participants are satisfied.

Recognizing that methodological guidance must align with L2 practitioner expertise as well as broader qualitative research standards, an open call for participation was issued through professional networks and social media. From this, fourteen experts were recruited to form the core Delphi panel (Round 1). These panelists represented a diverse range of research experiences, methodological orientations, and areas of specialization. Table 1 summarizes the characteristics of the core panel. Since this panel played a central role in developing the framework, background data were collected only from these members.[3]

The first round of the study offered a choice between an online, open-ended questionnaire and a structured interview. Questions were organized around five research phases: pre-study considerations, data collection, analysis, reporting, and post-study decisions. All qualitative responses were then abductively coded[4] using

[2]While many of the data sources listed in this and subsequent sections (e.g., learner diaries, field notes, interviews) are commonly associated with L2 qualitative research, several others (such as language-related episodes or fluency/accuracy measures) can be analyzed either quantitatively or qualitatively. Our use of the term qualitative, therefore, refers not strictly to the type of data collected but to the interpretive orientation of the research. Accordingly, the framework proposed in this paper primarily focuses on openness practices within interpretive and reflexive research traditions in L2 studies, while acknowledging that openness also extends to different forms of scientific analyses of similar datasets.

[3]Subsequent participants in Round 2 contributed to validating the guidelines but were not profiled for background information. The only eligibility criterion was self-reported experience and expertise in second language qualitative research.

[4]Abductive coding combines deductive and inductive reasoning. It allows researchers to begin with a preliminary framework (here, the five phases) while remaining open to unexpected themes arising from the data.

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Table 1. Overview of the core Delphi panel.

Variable	Distribution
Participation Mode	Interviews (n = 5); Survey (n = 9)
Years of experience with L2 research	<2 years (n = 4); 2–5 years (n = 5), 6–10 years (n = 3), 11–15 years (n = 1), >15 years (n = 1)
Years of experience with qualitative research	<2 years (n = 4); 2–5 years (n = 4), 6–10 years (n = 2), 11–15 years (n = 3), >15 years (n = 1)
Areas of expertise in L2 research	Applied linguistics and language education, phonetics and phonology, morphology, sociolinguistics, bilingualism, language attrition, and language-specific studies (e.g., L2 French, Hebrew SLA, Phoenician toponyms)
Type of data participants engage with	Linguistic data (e.g., interviews, essays, recordings, classroom interactions); non-linguistic data (e.g., diaries, reflection journals, observation notes, questionnaires, test scores); multimodal and digital inputs (e.g., video, maps, social media content); document-based sources (e.g., curricula, syllabi); and qualitative methodological approaches (e.g., narrative, phenomenology, ethnography, grounded theory)

Note. Separate summaries by participation mode (interview vs. survey) are provided in Appendix C.

the initial phases as broad categories while remaining open to emergent themes. Two authors independently coded 20% of the documents,[5] and a third author validated and resolved discrepancies. The remaining data was analyzed by the first author in consultation with the research team. Based on this analysis, a draft set of guidelines was developed to represent the first consensus cycle.

In Round 2, the draft guidelines were circulated broadly for endorsement and validation. This round included both returning panel members and additional volunteer participants recruited through a renewed open call (see Boel et al., 2021). Participants provided quantitative ratings (5-point Likert scale: 1 = strongly oppose, 5 = strongly endorse) for each guideline item, along with qualitative comments.

Following established Delphi conventions, the ratings were analyzed using means, standard deviations, and interquartile ranges; consensus was defined as a standard deviation and an interquartile range of ≤1 (Franc et al., 2023). Items meeting the threshold were retained, and those that did not were revised based on the qualitative feedback received. The modified guidelines were then sent back to the participants for follow-up comments (qualitative). After achieving agreement, the guidelines were finalized (see Figure 1 for the workflow). The full set of Delphi questions, anonymized codebook, analysis files, and de-identified excerpts from consenting panelists are available on the IRIS database (Shahiwala, Rahul, & Sidheeque, 2026a, 2026b).

The framework

The CLEAR-Qual Framework comprises a set of phase-specific guidelines that articulate Core (C) and Advisory (A) aspects of practicing openness throughout an L2 qualitative study (as indicated by an asterisk in the Guideline Tables 2–6). Here, core practices denote essential steps researchers should undertake to uphold *openness with* L2 qualitative research, while advisory practices represent important enhancements

[5]One hundred forty-four excerpts were coded independently by the two authors. Intercoder reliability was assessed using κ and percentage agreement, with a high level of agreement observed (90.79%) (reported in Appendix B).

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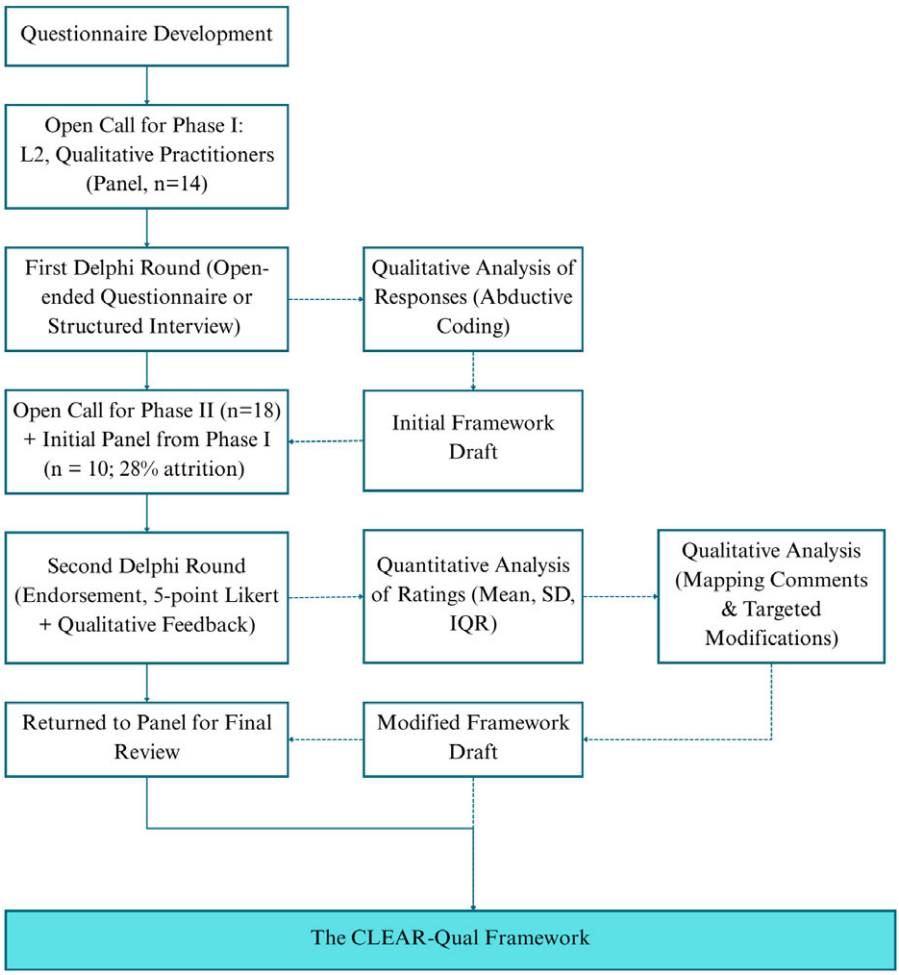


Figure 1. Delphi study: workflow.

that researchers are encouraged to adopt. This dual-tier approach mirrors Chong's (2025) baseline vs. preferred practices model for systematic secondary research and allows clear differentiation between foundational requirements and benchmarks.

To ensure that the drafted recommendations align with existing standards, all guidelines are explicitly mapped to the pillars of trustworthiness in qualitative research (i.e., credibility, transferability, dependability, authenticity, and confirmability; see Guba, 1981; Guba & Lincoln, 1989; see Appendix A). Besides, the framework is grounded in theoretical assumptions of qualitative and second language methodologies and open science principles.[6]

[6]For some comprehensive works, see Al-Hoorie et al. (2024), British Educational Research Association (2024), Caelli et al. (2003), Campbell et al. (2023), Dufon (1993), Nosek et al. (2015), Open Data Handbook (2015), Plonsky (2024). Note, the list is suggestive, not exhaustive.

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In practice, the framework provides items for each research phase (pre-study, data collection, analysis, reporting, and post-study). While we encourage authors to adopt the sequence as an integrated workflow, CLEAR-Qual is modular. Thus, each phase can also be used independently; for instance, a team may use the post-study phase as a guide to practice openness, or a journal editor might use the reporting-phase checklist to evaluate transparency in the methods section.

Pre-study decisions

This phase comprises 10 preparatory steps (see Table 2) that represent the researchers' initial decisions and shape subsequent phases of the study. Commonly referred to as the *planning* or *designing* stage (Dörnyei, 2007; Maxwell, 2009), it can be understood as establishing a foundational framework prior to constructing a more complex structure.

Researchers must begin by conducting a targeted review of the field (both the literal[7] and conceptual field) (S1). Thus, a comprehensive understanding of the existing literature, conceptual gaps, methodologies, and concerns of the study, as well as the ground realities of where the study will be conducted (site) and its implications, should be formulated before beginning any qualitative research. Based on this, researchers must articulate study objectives and strategies (including sampling plans, methodologies, and provisional analyses) while also considering the epistemological stance and paradigmatic viewpoints that will guide the research (S2). Subsequently, researchers must obtain institutional or equivalent ethical approval and/or preregister their study (S3). Where formal processes are not accessible (e.g., in small-scale or community-based projects), alternative forms of documentation and ethical oversight, such as peer review or expert (or community practitioner) consultation, should be considered. As Hesse-Biber and Leavy (2011) caution, ethics too often become marginalized once "real" research commences. Thus, early attention to these elements helps integrate OS from the outset rather than as an afterthought, contributing to the reduction of research waste (Al-Hoorie et al., 2024; Isaacs & Chalmers, 2025).

Researchers should also develop and pilot their instruments (S4) while ensuring that any interview guides, observation protocols, batteries, or other materials (including consent forms and participant information sheets [PIS]) align with participants' linguistic proficiencies (S8) and cultural contexts. Where appropriate, this may involve incorporating translations or multimodal formats (e.g., visuals or audios) to aid comprehension, particularly for participants with limited L2 competence. This also includes assessing materials for clarity, sensitivity, and relevance, and revising any terms or formats that might cause discomfort or misunderstanding. An explicit plan for data types and sources (see multilayered, multisource, and multidimensional data types in *Openness in and with L2 Research*), and the roles of gatekeepers or indirectly involved stakeholders (e.g., classmates, staff, parents) must also be articulated (S5). Such planning and piloting not only tests for procedural aspects but also surfaces deeper linguistic or cultural nuances, such as the need for triangulation or translators, that could inform further refinement before entering the field (Dörnyei, 2007; Richards, 2015).

Moreover, protocols for access, scheduling, and participant reciprocity should be defined (S6). If potential participants are students or teachers, alignment with the

[7]The scope and depth of engagement with the literal (or actual) field prior to data collection vary by researcher and research objective. While some familiarity with the site and context is necessary, researchers should avoid overexposure that may shape assumptions. Accordingly, this should be calibrated to balance familiarity with openness.

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Table 2. Pre-study guidelines.

ID	Guideline	*	Descriptor
S1	Engage with relevant literature and field context to inform and situate the study	C	Conduct a focused and/or iterative review of the literature and field to understand existing knowledge, approaches, and ethical considerations, while remaining open to new insights and methodological innovation.
S2	Define objectives, sampling strategy, paradigm & analysis plan	C	Clearly define the study plan and research strategy, including a rationale for each stage.
S3	Obtain institutional or equivalent ethical approval and/or preregister your study	C[A]	Obtain institutional or equivalent ethical approval (where required) and preregister your research design. For small-scale, community-based, or context-driven projects where formal approval is not accessible, consider alternative forms of documentation and ethical oversight (e.g., peer review, community consultation) [Advisory where formal ethical review is not available].
S4	Develop and pilot instruments	C	Draft relevant protocols, guides, or observation sheets in advance. Refine the instruments through small-scale piloting to ensure clarity, cultural and linguistic appropriateness, and contextual fit.
S5	Define data type and sources	C	Select and justify your sources (e.g., audio, journals, diaries, notes, evaluative scripts) and data type (e.g., linguistic, non-linguistic). Accordingly, identify participants, gatekeepers (schools, parents), and anyone indirectly implicated (e.g., classmates, staff members).
S6	Plan access, scheduling, and reciprocity	A	Secure permissions, respect academic calendars, estimate session lengths, and decide on participant benefits (e.g., feedback, honoraria).
S7	Reflect upon linguistic and non-linguistic positionality and power dynamics	C	Acknowledge how your own language background, beliefs, and institutional roles may shape data collection, analysis, and reporting.
S8	Ensure proficiency alignment across all contact points (e.g., PIS, consent forms, battery)	C	Adapt wording in consent forms, participant information sheets, battery questions, tasks, or stimulus materials to participants' L2 level so that it is comprehensible.
S9	Build trust and cultural-linguistic sensitivity through collaborative engagement	C	Work with participants, gatekeepers, and, where relevant, local experts and multilingual communities to ensure respectful and culturally/linguistically sensitive engagement that supports mutual understanding, builds trust, and safeguards participants and their communities from harm.
S10	Define consent tiers and processes	C	Consider the layers of consent required for current and future studies (e.g., consent for data sharing, recording, return of contact, future reuse) and the manner in which consent will be recorded (oral, written, or both).

Note. C = Core guideline; A = Advisory guideline.

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academic schedule is not only good practice but, in school-based contexts, a core requirement for ethical and reliable research. Factors such as proximity to examinations or peak workload periods can significantly influence both participation and the validity of the data collected. In all contexts, researchers should also consider how participants will be accessed, whether the institution, teachers, or parents will be contacted, and what benefit (monetary or non-monetary, if any) they will receive from the study.

The researchers must also engage in reflexive practices. They must examine how their own linguistic as well as non-linguistic positionalities may influence rapport, access, and interpretation (S7). This includes reflecting on how dominant ideologies and assumptions might shape the framing, design, and interpretation of research, potentially introducing epistemic bias in multilingual and multicultural environments. Thus, considerations over issues of access, such as those related to linguistic (non-) nativity, data contamination due to response biases such as the Pygmalion effect or the Hawthorne effect in classroom settings or instructor-led research (Costlow & Bornstein, 2018), or the impact of (non-) cultural assumptions on interview questions, should be made before beginning the study. Accordingly, researchers should actively engage with participants, gatekeepers, experts, or community members during this phase, particularly in the context of minority or endangered languages (S9). Such collaboration is ethically crucial and can strengthen the validity and reciprocity of the research. Besides, the focus should be on developing cultural and linguistic sensitivity and mutual respect.

Finally, yet most importantly, consent tiers and processes must be defined (S10). Before data collection begins, researchers should decide whether consent will be oral, written, or both, and specify which permissions will be sought (e.g., data collection, recording, future data sharing, data reuse). They must also identify any additional stakeholders (e.g., parents, teachers) whose permission is required (Cohen, Manion, & Morrison, 2002; Dörnyei, 2007). To reiterate, consent documents should be structured according to participant proficiency so that they are easily understandable (S8), and participants can opt in or out of any permission tier at any time. To support this, we introduce a tiered participant-informed consent form (PICF-T), which separates permissions into independently selectable tiers so that participants can exercise granular and ongoing control over how their data will be used. Editable templates of the PICF-T and PIS are available in the Supplementary Materials. Researchers using the CLEAR-Qual framework are encouraged to employ them in order to streamline the consent process and enable participants to make fully informed choices.

Data collection

In the data collection phase, methodological transparency becomes integral to accountable research. As Holliday (2004, p. 732) points out, "when the choices are more open, the procedure must be more transparent so that the scrutinizers of the research can assess the appropriateness of the researchers' choice." Thus, nine interconnected practices (D1–D9) (see Table 3) guide researchers in conducting ethical and accountable research in L2 qualitative contexts.

Firstly, researchers must explain research aims, procedures, potential risks and benefits, and the complete gamut of participant rights[8] to all participants (D1). Consent

[8]Under Articles 12–23 of the General Data Protection Regulation (GDPR), data subjects enjoy the right to be informed, the right of access, the right to rectification, the right to erasure (the "right to be forgotten"), the

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Table 3. Data collection guidelines.

ID	Guideline	*	Descriptor
D1	Obtain informed and detailed consent from participants and/or institutions/ teachers/guardians	C	Explain study purpose, procedures, potential risks/benefits, and offer options for the different consent tiers (e.g., extent of data sharing, long-term use, etc.). Clarify rights to information, rectification, erasure, objection, and restrictions on data processing. Provide consent materials in both L1 and L2 (if applicable).
D2	Respect participant agency across all points	C	Ensure participants can freely decline to answer any question or withdraw at any point. In group settings (e.g., classroom), proactively address and manage non-consent (e.g., participants who opt out of recording). Re-offer translation if a concept is difficult to express in L2.
D3	Ensure ethical, secure, and confidential recording and storage	C	Use secure devices and platforms for recording and storing data. Ensure all recordings are encrypted where possible and access is limited to those directly involved in the research. Take reasonable steps to safeguard confidentiality and secure disposition.
D4	Verify obtained information through member checks	A	Summarize key points or interpretations during or immediately after interviews or interactions to check for accuracy and clarity. Invite participants to confirm, clarify, or correct your understanding, especially where proficiency, ambiguity, or cultural expression may affect meaning.
D5	Log decisions and practice methodological reflexivity	C	Maintain a log of all methodological decisions (e.g., simplifying questions, offering definitions, code-switching, etc.) and record rationales for each. Keep a 'language diary' of translation choices and challenges.
D6	Record reflexive notes and post-session memos	C	Reflect explicitly on how your own L1/L2 competence, accent, or cultural assumptions may have influenced learner responses or rapport.
D7	Allow flexibility and dialogue	C	Allow for flexibility to field-specific challenges and record any decisions or changes transparently.
D8	Discuss with co-researchers	C	Regularly discuss notes with colleagues or a research team to challenge assumptions; debrief on linguistic/non-linguistic inconsistencies.
D9	Practice reflexive distancing	C	Step back to examine assumptions about L2 proficiency, cultural interpretation, or linguistic intention (e.g., "How might a beginner vs. advanced learner interpret this question?" or "What did I assume about their vocabulary knowledge here?")

Note. C = Core guideline; A = Advisory guideline.

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forms should be translated to participants' L1 if necessary, and any ambiguities or misunderstandings regarding their rights should be clarified before the study begins (Dörnyei, 2007). Editable templates for the tiered consent form and PIS are available in the Supplementary Materials. Equally, participants' agency must be protected at every moment; individuals may decline to answer specific questions or withdraw entirely, and in group settings, non-consenting members must be carefully accommodated (D2) while ensuring that power dynamics in classroom or group-based data collection settings do not overpower individual choice (Wilkinson, 1998).

Once consent is in place, all recordings demand ethical, secure, and confidential storage and management (D3). Audio/video files should be stored in encrypted, access-limited folders with clear destruction timelines (e.g., five years post-publication) to meet both institutional and GDPR standards. Here, it is advisable to consult the Data Management Plan (DMP)[9] to guide systematic governance of data throughout its lifecycle (Digital Curation Centre, 2013).

Member checks (D4) further help validate the accuracy and meaning of participants' contributions. Researchers may clarify any understandings or confusions immediately after each session, in person, or send concise session summaries to solicit participant feedback on intended meanings. Moreover, to enhance dependability and confirmability of data, researchers should maintain a detailed log trail (D5), which is generally an electronic or physical journal that helps document in-field decisions (e.g., simplifying prompts, code-switching, offering definitions) alongside their rationale (Richards, 2015). Parallel to this, reflexive memos (D6) capture how the researchers' linguistic repertoire or positionality may have influenced participant responses throughout the data collection process. Such "post-session wrap-up" notes generally also aid in summarizing information when "memory is fresh" (Bachiochi & Weiner, 2004, p. 167).

It is a truth universally acknowledged that a qualitative study is, by definition, "messy" (Richards, 2015, p. 38), and the mess and clutter are more often than not a mirror to the complexities of subjective, real-life data. Thus, it becomes undeniable that qualitative research embraces flexibility (Bachiochi & Weiner, 2004; Lim, 2025). Researchers should, therefore, remain open to any in-field adaptations (D7), such as shifting from class-based discussions to interviews if rapport or noise becomes an issue, or switching to participant L1 during interviews to aid understanding. Such emergent design choices are natural in realistic qualitative studies and must be logged and justified to maintain transparency[10] (Maxwell, 2011).

If a study is conducted by a group of researchers, regular peer debriefing (D8) becomes essential to keep the team informed and to step back and analyze in-field decisions and resolve confusion. Finally, regular reflexive distancing (D9) is essential to question how assumptions influence the data collection methods. For example, in a

right to restrict processing, the right to data portability, the right to object, and rights in relation to automated decision-making and profiling (see European Parliament & Council of the European Union, 2016).

[9]The DMP is a checklist created by the Qualitative Data Repository. It encourages reflection upon aspects such as the kind of data collected, its formats and metadata standards, storage and backup, sharing, and long-term preservation and destruction (Digital Curation Centre, 2013).

[10]Where ethical approval has been obtained (e.g., via institutional review boards or institutional ethics committees), any significant methodological changes, such as shifts in data collection methods or language use, should be formally submitted. This process is a standard component of maintaining ongoing ethical clearance and ensures accountability throughout the study.

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study of L2 French learner diaries, the investigator might pause to ask, "Would beginner-level learners interpret the prompt 'describe a memorable conversation' the same way as advanced learners?" Reflecting on such choices and accordingly allowing for modifications helps researchers guard against inadvertently privileging one learner group over another (Berger, 2015).

Analysis

"The ultimate power of field research lies in the researcher's emerging map of what is happening and why" (Miles & Huberman, 1994, p. 65). In the analysis phase, this map is structured around seven practices (A1–A7, see Table 4). Researchers begin with meticulously transcribing and anonymizing raw records (A1). Any (direct or indirect) identifying information (e.g., participant names, institutions, or locales) must be replaced or modified to safeguard confidentiality. At the same time, where relevant, researchers may retain some linguistic markers (with caution) through contextually appropriate pseudonyms to preserve analytical depth.

Transcription should begin simultaneously or soon after data collection to minimize recall bias and capture para- and non-linguistic nuances (e.g., pauses, overlaps, code-switching, accent markers, or others as required) that often get lost in delayed transcription. Besides, if computer-assisted software transcription (CAST) is employed, researchers must assess their methodological and ethical implications,[11] and validate utterances, especially those influenced by mother-tongue interference or strong accents, in order to guard against misinterpretation of learner speech (Dörnyei, 2007). When made transparent and accessible, transcription would enable other researchers to "make their own checks and judgements as to the plausibility and coherence of the analysis" while supporting the empirical grounding required for qualitative validity (Wiggins & Potter, 2007, p. 85).

Closely linked to this process is the transparent documentation of all linguistic (and non-linguistic) decisions made in the process (A2). When normalizing disfluencies, expanding abbreviations, or translating utterances, each step must be logged while noting any challenges or potential losses in meaning (Bucholtz, 2007; Nikander, 2008). For example, when translating a learner's L1 utterance, one might annotate, "Spanish: '¿Cómo va eso' rendered as 'How's it going'; loss of idiomatic nuance noted."

Once the anonymized files are ready for further analyses, researchers code the data to transform the "messy farm products" of linguistic information into structured parcels suitable for interpretation (Dörnyei, 2007, p. 250). Here, reliability checks can be aligned with the coding approach employed (A3). For instance, in deductive frameworks, multiple coders can independently apply a predefined coding framework to a portion of data and accordingly compute inter-coder agreements (e.g., see O'Connor & Joffe, 2020). On the other hand, for purely inductive designs in the absence of a coding framework, structured sessions, wherein coders can discuss coding strategies, definitions, inclusion/exclusion criteria, etc., may ensure that the emergent categories are transparently formed (Morse, 1997, 2015). In smaller-scale or single-researcher projects, reliability may be supported through systematic reflexive notes, consultations with peers or mentors, or external audits of coding decisions, as necessary.

[11]CAST raises concerns related to accuracy, data security, and the integrity of participant voice, all of which must be addressed explicitly in the research report (Dörnyei, 2007).

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Table 4. Analysis guidelines.

ID	Guideline	*	Descriptor
A1	Transcribe and anonymize data directly or indirectly	C	Transcribe collected data to minimize recall bias and preserve linguistic detail. During transcription, anonymize identifying information, such as names, institutions, or locations, either directly (e.g., replacing names) or indirectly (e.g., using broad categories, or choosing culturally and contextually aligned pseudonyms). Where applicable, retain language-specific features (e.g., code-switching, accent markers, phonological variation, discourse fillers, or learner-specific constructions) for further analyses.
A2	Record linguistic decisions during transcription	C	Transparently document decisions about representing participants' language use, corrections, translations, etc. When data is translated, detail the translation process and note any interpretive challenges or losses in meaning.
A3	Code data and align reliability checks with your coding method	A	For deductive/abductive coding, have multiple coders work independently and report reliability metrics; for inductive coding, use structured consensus sessions with a documented trail to refine and agree on codes. In small-scale or solo projects where multiple coders are not available, researchers may enhance reliability through audit trails or peer debriefing, as necessary.
A4	Validate and triangulate data sources	C	Compare, contrast, and validate recorded data (e.g., compare/converge/diverge interview findings with observation notes or learner diaries).
A5	Encourage collaborative meaning-making	A	Where appropriate, involve participants in documenting and interpreting their contributions. This may include inviting them to annotate their transcripts (e.g., clarifying slang or idioms) and/or addressing linguistic ambiguities, translation concerns, or misrepresentations.
A6	Acknowledge limitations related to self-reported data	C	Clearly discuss the linguistic and non-linguistic limitations inherent in self-report data (e.g., impact of proficiency or memory bias), especially when interpreting learners' reflections or perceptions.
A7	Practice analytical reflexivity	C	Critically reflect on your own teaching/non-teaching positionality, language background, and potential biases throughout the analytic process.

Note. C = Core guideline; A = Advisory guideline.

Triangulation further helps validate analytical claims by bridging the different data points recorded (A4). In practice, researchers naturally (and inevitably) compare interview transcripts with field notes, diaries, logs, audit trails, and even quantitative measures (e.g., lexical analyses of utterances, proficiency tests, etc.) so as to triangulate not only sources and methods, but also investigators and data types (Denzin, 2015; Miles & Huberman, 1994). For instance, a researcher might align interview data with vocabulary level to reveal unexpected convergences, divergences, or contradictions; a learner's self-report might claim that peer feedback was "very helpful," but classroom recordings might show minimal peer interaction, leading to further potential probes by the researchers.

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Such analytical understandings may further be extended to the participants by encouraging collaborative knowledge creation (A5). For instance, learners might receive their transcribed data in a shared Google Doc, where they can highlight "¿Cómo va eso" and add marginal notes explaining context ("this is what friends say when…"). Such *participant-as-transcriptionist* methods not only correct researcher misunderstandings but also help create thick data through metalinguistic commentary (Grundy, Pollon, & McGinn, 2003).

At this stage, researchers may also consider sending a brief overview of the themes or provisional findings and soliciting structured feedback[12] to validate interpretations (McKim, 2023). In second language contexts, however, the practice should be applied judiciously: not all participants may feel comfortable engaging with abstract thematic summaries, and language proficiency may constrain their ability to comment on the researcher's interpretations. Meanwhile, researchers must also remain attentive to the additional time and effort these steps demand. Member checking constitutes extra labor for participants, and therefore, as a first step, explicit consent must be obtained (in the pre-study phase), and where feasible, their contribution should be recognized through compensation or reciprocity to avoid exploiting goodwill.

Finally, since "the research relies upon the (inevitably somewhat subjective) interpretation of a particular human being who will necessarily bring his or her own idiosyncratic experiences," rigorous analyses must acknowledge the layered subjectivities at play (Taber, 2013, p. 45) (A6). Learner accounts may be shaped by proficiency constraints (e.g., vocabulary gaps, L1 transfer, proficiency, etc.) or memory biases that may distort retrospective accounts. At the same time, researchers themselves bring positionalities, language backgrounds, and implicit assumptions about linguistic *correctness* or normative usage that can influence the coding and interpretation of the data. Reflectively attending to both participant and researcher subjectivities and transparently discussing such biases would, ultimately, help contextualize findings (A7).

Reporting

Transparency and reflexivity converge with all previous sections and become central to the reporting stage. Thus, the following guidelines (R1–R10, see Table 5) will help researchers bring accountability into their final reports.

Firstly, before drafting any research report, authors should foreground their positionality (R1). This should not be understood as mere academic self-disclosure. Since no story of data collection or analysis is neutral, acknowledging our subjectivity from the outset helps guard against unspoken biases. Thus, by explicitly addressing institutional roles, linguistic backgrounds, and other power positions, and reflecting on how these shaped earlier phases as well as how they will influence the writing process, researchers move toward clarity in their subsequent choices.

As Miles and Huberman (1994, p. 301) remind us, "We all need to eschew obfuscation, er, uh… be clear about what we have to say." Thus, researchers must create a systematic and comprehensive final report (R2). Unlike the standardized IMRaD (i.e., Introduction, Methods, Results, and Discussion) structure of quantitative

[12]For systematic member checking, McKim (2023) recommends prompting participants to (a) reflect on their overall impressions of the findings, (b) assess how accurately their experiences are represented, (c) suggest any additional aspects that capture their perspectives, and (d) identify areas needing modification and/or removal.

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Table 5. Reporting guidelines.

ID	Guideline	*	Descriptor
R1	Acknowledge researcher positionality	C	State the researchers' identities, roles, and language backgrounds, and reflect on how these influence the research process.
R2	Report the research process comprehensively	C	Explicitly state the theoretical or epistemological stance guiding the research, and provide detailed information on the research design, data collection methods, analytical procedures, and research team composition. Transparently document decisions made at each stage of the research process and explain how these decisions shaped the study's direction and outcomes.
R3	Contextualize the method and findings of the study	C	Situate findings within L2 learning contexts and clearly describe the linguistic, social, and institutional context to support interpretation.
R4	Ensure evidence-to-interpretation traceability	C	Establish clear traceability from raw data to interpretation by providing illustrative codebooks with operationalized definitions, inclusion/exclusion criteria, and example excerpts for codes.
R5	Report linguistic and non-linguistic data features (as applicable)	C	Include details on verbal, non-verbal, and/or para-verbal elements of communication, where relevant.
R6	Ensure ethical representation of participants	C	Represent participant voices respectfully and accurately, particularly considering power dynamics and language proficiency. Use gender-sensitive or gender-neutral language where appropriate to avoid misrepresentation or bias.
R7	Use only anonymized data excerpts	C	Share quotes or examples from participants only after removing all identifying information, including indirect markers.
R8	Provide an audit trail and include reflexivity statements	A	Document how analytical decisions were made. This may involve sharing structured audit materials (e.g., decision trees, coding pathways) and incorporating reflexivity statements or excerpts from researcher memos to acknowledge the overall research process.
R9	Create open methods resources	A	Provide extended methods, coding grids, linguistic annotation systems, or analysis rubrics used during the research process using appendices, supplementary materials, or project components (in repositories).
R10	Acknowledge reporting constraints reflexively	C	Transparently discuss any limits on openness (e.g., institutional sensitivity, participant discomfort) that affected reporting.

Note. C = Core guideline; A = Advisory guideline.

studies, qualitative reports favor a vivid, flexible narrative (Dörnyei, 2007). Nevertheless, narrative vividness should not come at the expense of transparency. Every pivot from the original plan (preregistered) should be documented, justified, and linked to the aims of the study (Al-Hoorie et al., 2024). Such a strategy not only enhances clarity but also allows the readers to understand how certain decisions shaped the findings. Besides, transparency also applies to the research process itself, including team-based collaborations; for example, in multi-authored works, specifying researchers' contributions through established frameworks such as the CRediT taxonomy can support accountability (Allen, O'Connell, & Kiermer, 2019).

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Moreover, qualitative data is "inextricably linked to the context," and removing it from its "true meaning" might impact its interpretation (Chauvette et al., 2019, p. 3). Contextualization of reported data, therefore, becomes essential (R3). In practice, for example, while reporting that learners struggled with teacher feedback, it must be clarified whether this occurred in a high-stakes exam preparation course, a multilingual urban school, or a vocational program, and how the environment and academic calendars presented unique affordances to the responses.

Qualitative researchers are also often criticized for anecdotalism and cherry-picking (Dörnyei, 2007; Morse, 2010). To avoid this and improve transparency, researchers must ensure a clear traceability from evidence to interpretation (R4). This means that a representative codebook, coding framework, or other relevant materials should be outlined in the report to help readers understand how raw data was transformed into analytical claims.

Importantly, studies must also comprehensively report the previously transcribed linguistic and non-linguistic nuances (R5). Ethical representations also demand that any quotes provided in the final report are respectful and accurate without over-corrections or exotification (R6). Here, gender-sensitive or neutral pronouns (as required) should be used throughout, and voices should be presented without reinforcing any power imbalances (Denham & Onwuegbuzie, 2013). Finally, it is equally critical to verify the anonymity of all reported excerpts. Any direct (e.g., name, institution, or locale) or indirect (e.g., job title, classroom hierarchy) identifier that could trace back to any individual/institution should be further removed (R7).

Besides quotations or excerpts, transparency also extends to the researcher's reflexivity (R8). Across the different phases in research,

> we are not expected to be all-knowing …[or] ask all the right questions, make flawless decisions, or use the most advanced and sophisticated methods that exist. We are, however, expected to be honest and transparent in our research about what we did and why (Al-Hoorie et al., 2024, p. 542).

Thus, in the final report, including decision trees or quotations from previously drafted field notes, reflexivity memos, or post-session notes can help readers follow through with the research (R8). In this regard, researchers might face limitations related to strict word limits and journal standards. To overcome this, we encourage the creation of open methods resources (R9) for any relevant methodological or analytical expansions and rubrics. Importantly, research also shows that such 'extenders' can significantly increase the visibility and readership of publications (Cavana & Jenkins, 2025).

Finally, institutional sensitivities, participant discomfort with certain disclosures, or resource limits are all inescapable limits of reporting qualitative data transparently; any such "omissions and compromises in transparency" (Al-Hoorie et al., 2024, p. 541) must be acknowledged reflexively (R10). By openly discussing these limitations, we not only help prepare future researchers but also invite readers to critique existing barriers and reflect upon the limits of openness.

Post-study considerations

Engagement with research does not cease at publication; the post-study phase includes practices reflecting ongoing transparency that extend well beyond reporting. At this stage, scholars embrace openness as a commitment to the broader community while safeguarding participant interests and maximizing transparency (see P1–P7, Table 6).

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Table 6. Post-study guidelines.

ID	Guideline	*	Descriptor
P1	Provide community reciprocity and updates	A	Share accessible summaries and project updates with participants
P2	Archive all data collection instruments	C	Deposit interview guides, questionnaires, stimulus materials, consent forms, and any task protocols alongside your data. Supply metadata for any deposited dataset to ensure reusability.
P3	Ensure ethical alignment and context-sensitivity in data reuse	C	Before any secondary sharing or analysis, confirm that proposed uses align with your study's original aims and respect the social/linguistic context of participants. If reuse was not covered by the original consent, either restrict deposit to aggregated or summary-level data or omit sensitive raw materials entirely.
P4	Remediate study data and deposit in a trusted repository	A	Remediate all transcripts and associated materials to remove any identifying information that may have been inadvertently missed earlier. Once fully anonymized, deposit transcripts, field notes, codes, reflexivity statements, and other relevant documentation in a trusted open-access repository (e.g., OSF, QDR, IRIS), in line with participant consent and institutional policies.
P5	Specify terms for ethical reuse	A^C	Attach a data-use agreement that requires secondary users to uphold confidentiality and original ethics. Document how participants can request data removal, per GDPR/articulated consent [Core guideline if P4 is followed].
P6	Explain access restrictions for sensitive data	C	If portions of your data must remain closed (e.g., vulnerable populations), include a clear statement on why public access is precluded.
P7	Engage with policy- and practice-oriented stakeholders	C	Proactively translate findings into recommendations for educators, policymakers, or professional associations in L2 contexts. Include practitioner-oriented summaries in plain language where possible.

Note. C = Core guideline; A = Advisory guideline.

Researchers must continue contact with participants and practice reciprocity (P1). In the simplest of terms, reciprocity can be viewed as a *quid pro quo* in the researcher–participant relationship. Communities share a part of their life with the researchers, and it is appreciated if a part of the research is sent back to the community in the form of infographics, summaries, or other accessible outputs (Mauro et al., 2024). Here, platforms such as TESOLGraphics and Open Accessible Summaries in Language Studies (OASIS) provide established models for creating and disseminating research in accessible formats. Importantly, however, such efforts must remain firmly within boundaries of informed consent (as received in the pre-study phase). For multilingual or minoritized contexts, providing summaries in participants' L1 can strengthen inclusivity and accessibility, but these practices should never override participant privacy, data protection, or cultural sensitivities.

Another consideration that is often touched upon in OS debates, especially as a part of post-study, is that of data archiving or data sharing (for discussions on open data, see Chauvette et al., 2019; Khalil et al., 2022). Before addressing it in L2 qualitative context, it is an essential reminder that "transparency is not an all-or-nothing proposition and

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can be pursued in many different ways" (Kapiszewski & Karcher, 2021, p. 285). Building on this, the next step is to make accessible the very tools that shaped the research study. Thus, researchers must first begin by archiving their instruments. In L2 qualitative studies, where wording, prompts, and stimuli are equally important, depositing interview guides, questionnaires, stimulus materials, and/or any task protocols becomes a core practice (P2). While many archiving efforts focus solely on participant data, preserving the exact versions of instruments used is essential for reproducibility and contextual understanding. The IRIS database, the Task-Based Language Teaching (TBLT) Task Bank, and the Multilingual Repository in Applied Linguistics (MuRAL) are increasingly used to make such materials available to other researchers.

Once instruments are safely deposited, attention must turn to the ethical aspects of any potential reuse (P3) and the technical aspects of anonymization (P4). In many qualitative contexts, data may be too sensitive, too culturally situated, or simply beyond the scope of the original consent to allow for open sharing. In such cases,[13] researchers may instead provide aggregated summaries, metadata records, or synthetic examples to enhance transparency without disclosing raw materials (Digital Curation Centre, 2013). Where deposition is appropriate and ethically approved, transcripts must be remediated to remove any remaining identifiable information. Campbell et al. (2023) outline a combination of automated and manual de-identification strategies (e.g., using natural language processing followed by manual validation and bracketing of residual identifiers) to guard against reidentification risks. To this end, several repositories, such as the Qualitative Data Repository (QDR), also provide guidelines for ethically archiving participant data (Demgenski et al., 2021). Researchers may also use registries such as the Registry of Research Data Repositories (re3data) to locate discipline-appropriate repositories and identify suitable venues for depositing qualitative materials (Pampel et al., 2013).

Parallelly, researchers should specify clear terms for ethical reuse of data (P5) and explain any access restrictions in case of sensitive data (P6). A data-use agreement should be created that requires secondary users to uphold confidentiality clauses and original ethical commitments and documents procedures for requesting data removal (along with relevant contact details). For portions of the dataset that must remain closed, researchers should document the rationale in their data availability statements and clarify why public access is precluded (Mackey & Gass, 2021).

Notably, post-study openness discussion extends beyond data and comes full circle with reciprocity beyond the participant community. As part of strengthening transparency of outputs, initiatives such as the Postprint Pledge encourage researchers to make accepted manuscripts openly accessible, further supporting the principle of reciprocity. Researchers should also engage policy and practice-oriented stakeholders by translating findings into recommendations for educators, curriculum designers, and policymakers (P7). Such outward focus not only enhances the impact of the study but also upholds the principle of reciprocity in higher education, whereby research benefits the participant, researcher, and practitioner communities.

[13]Ethical sensitivity may depend upon several things, including the research topic, participant characteristics, or sociocultural contexts. For example, studies involving learners' anxiety, religious or cultural identity, marginalized or vulnerable populations, or personally or politically sensitive issues often require heightened caution when considering data sharing.

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Looking ahead for open L2 qualitative studies

The CLEAR-Qual framework advances qualitative research in L2 contexts by treating openness as processual, relational, and evolving. Its implications are best understood in the way it normalizes explicit documentation, reflexivity, and the recognition of participants as interpretive partners rather than data sources. Practices such as preregistration, reflexive logging, tiered consent, member-checking, and collaborative interpretation embed openness across all phases of the research. In this sense, rigor gets anchored in ethics and transparency while accommodating adaptability to the research process.

Shohamy (2004, p. 729) reminds us that frameworks should not "discredit research complexity or dictate fixed paradigms" but encourage reflexivity and innovation. CLEAR-Qual takes this stance by foregrounding systematic flexibility as its raison d'être. As Dörnyei (2007, p. 242) notes, the core of qualitative analysis is "to develop and follow certain principled analytical sequences without being tied by the constraints of the procedures and sacrificing the researcher's creative liberty." CLEAR-Qual extends this principle to the entire research process. The framework does not aim to provide an exhaustive list of dos and don'ts of conducting open qualitative L2 research; it rather hopes to encourage conducting ethical and accountable research that is characterized by clarity, responsibility, reflexivity, and transparency.

Consider, for instance, a study on code-switching among intermediate L2 Spanish learners. Pre-study openness might include preregistering participant selection criteria and recording protocols, alongside signing the Postprint Pledge for future open access dissemination. During data collection, a reflexive log might justify shifts from recording entire class sessions to small-group interactions, while tiered consent accommodates differing comfort levels with video or audio data. Analysis incorporates member checking, where participants review transcripts and co-interpret excerpts with the researcher. Reporting standards are made more open as the researchers quote their own notes in the manuscript to help readers understand the overall process. Finally, transparency in the post-study phase gets enacted through multiple forms of sharing. Instruments such as an interview guide and task protocol are deposited in the IRIS Database, and classroom tasks designed for the study are made available in the TBLT Task Bank. Findings are further translated into accessible outputs via OASIS and TESOLGraphics, which are disseminated back to participants, teachers, and practitioners. Anonymized transcripts, coding frameworks, and reflective logs are also deposited in open-access repositories (e.g., OSF, MuRAL) as open methods resources.

Such systematic flexibility is at the center of the framework; it maintains openness as an ongoing practice that integrates across all phases of the research process. Thus, participant agency is foregrounded; multimodal/multilayered data and methodological pluralism become standards; responsible engagement facilitates ethical sharing, transparency, and cumulative learning.

Looking forward, adopting CLEAR-Qual would distinguish L2 qualitative research through transparent methodological accounts and explicit rationales that enhance transparency with the researcher, the participants, as well as the research. Such a movement, coupled with the complexities of qualitative data in L2 research, responds to Campbell et al.'s (2023, p. 3) call to explore "whether more could be learned and whether there are additional discoveries to be made through data sharing".

We invite researchers to pilot, critique, and adapt CLEAR-Qual across diverse qualitative contexts. Journals, editors, and peer reviewers can also use the framework as a reference point for evaluating openness in submissions. Beyond individual uptake,

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there is a need for platforms specific to second language qualitative research[14] that facilitate ethical data sharing, archiving, and collaborative analysis. Equally important is also a community of researchers, practitioners, and educators who can guide and sustain open practices in qualitative L2 research.

By embedding systematic flexibility as the guiding principle of openness, CLEAR-Qual positions L2 qualitative research for a future grounded in accountability and ethical responsiveness. The framework is hoped to offer a timely, practical, modular approach, with core and advisory practices raising the bar for transparency. Keeping in mind that "it is not epistemologically incongruent to challenge longstanding norms of methodological opacity and to prompt researchers for more detail about how their findings were generated and the contexts that bound that knowledge" (Campbell et al., 2023, p. 3), CLEAR-Qual aims to make openness a routine in second language qualitative research.

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[14]While existing platforms already provide a strong infrastructure for data sharing, a dedicated platform could offer contextualized metadata for language-based research (e.g., including proficiency levels, task types, or interaction modes), options for conditional access to sensitive data (e.g., allowing different access levels depending on participant consent or data sensitivity), dedicated spaces for sharing interpretive artefacts (e.g., storing reflexive logs, analytic memos, or document notes explaining decisions), and support for collaborative analyses (e.g., enabling primary and secondary researchers to work together for valid and reliable interpretation of contextually-embedded data).

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Appendix A

To ensure alignment with established standards for qualitative rigor, we mapped all drafted recommendations against the five pillars of trustworthiness proposed by Guba and Lincoln (1989). Figure A1 provides a visual overview of this mapping across the different stages of the research process and illustrates how the recommendations collectively support trustworthiness throughout the study lifecycle. The figure was developed in R using the tidyverse package.

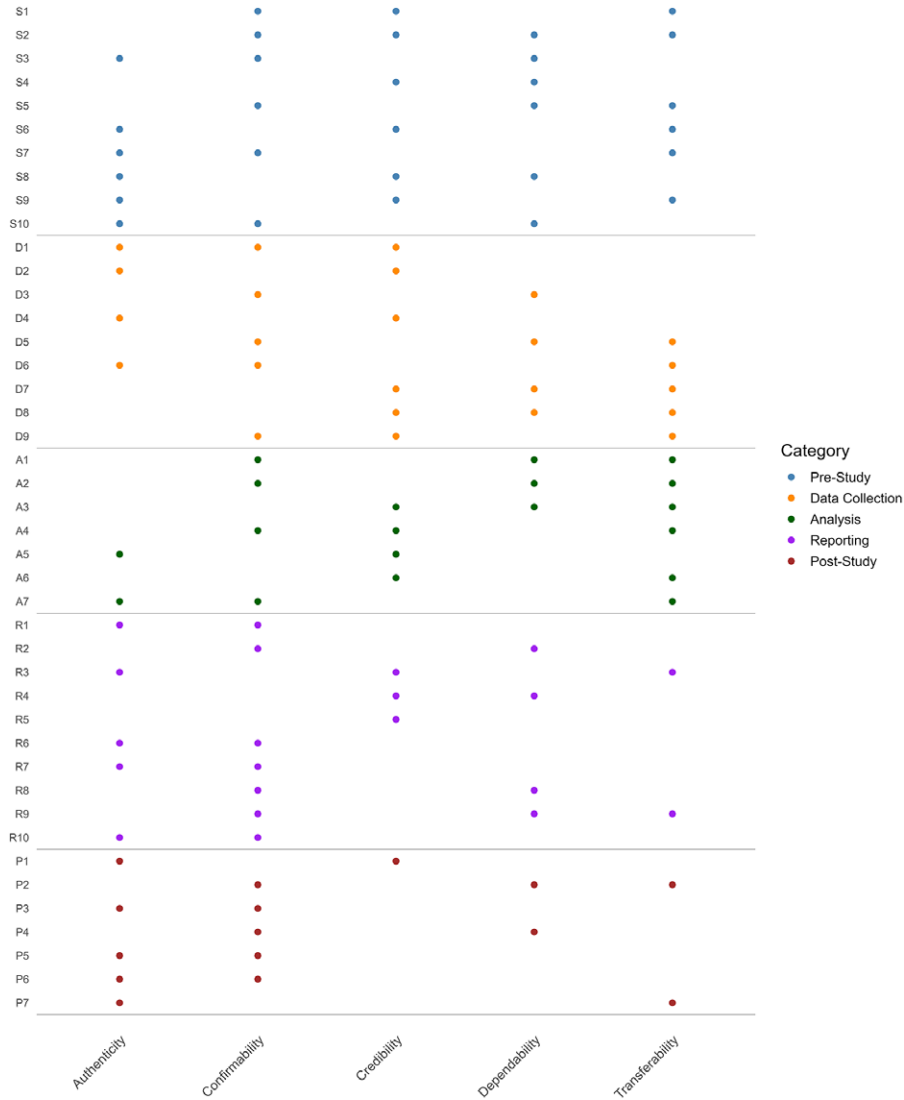


Figure A1. CLEAR-Qual–trustworthiness mapping.

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Appendix B

Three documents were randomly selected and independently coded by two authors using the agreed coding framework. A third author reviewed and resolved any discrepancies. Table B1 presents the intercoder agreement percentages and Kappa values. This high level of agreement is expected given that the responses came from a structured questionnaire organized around predefined phase-based categories, and the coding framework was directly derived from these phases.

Table B1. Intercoder agreement.

Document ID	Agreements	Disagreements	Percent	Kappa (RK)
C4	93	12	88.57	0.89
C5	98	7	93.33	0.93
C7	95	10	90.48	0.90
Total	286	29	90.79	N/A

Appendix C

Table C1 provides detailed profiles (self-reported) of the core panel members based on their mode of participation (interview or survey).

Table C1. Detailed summary: participation mode.

Variable	Distribution (interview participants, n = 5)	Distribution (survey participants, n = 9)
Experience with L2 research	<2 years (n = 3); 11–15 years (n = 1), >15 years (n = 1)	<2 years (n = 1); 2–5 years (n = 5), 6–10 years (n = 3)
Experience with qualitative research	2–5 years (n = 1); 11–15 years (n = 3); >15 years (n = 1)	<2 years (n = 4); 2–5 years (n = 3), 6–10 years (n = 2)
Areas of expertise in L2 research	Applied linguistics and language education, sociolinguistics	Language education, phonetics and phonology, morphology, sociolinguistics, bilingualism and language attrition, and language-specific studies (e.g., L2 French, Hebrew SLA, Phoenician toponyms)
Type of data participants engage with*	Linguistic data (e.g., interviews, essays, recordings, classroom interactions); non-linguistic data (e.g., diaries, reflection journals, observation notes, questionnaires, test scores); multimodal and digital inputs (e.g., video, maps, social media content); document-based sources (e.g., curricula, syllabi); and qualitative methodological approaches (e.g., narrative, phenomenology, ethnography, grounded theory)	

Note. *This category was merged across interview and survey participants, as researchers in L2 studies typically engage with multiple and overlapping data types rather than mutually exclusive categories

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