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**DIRECTORATE FOR EDUCATION AND SKILLS
PROGRAMME FOR INTERNATIONAL STUDENT ASSESSMENT**

Governing Board

PISA 2025 TECHNICAL STANDARDS

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PISA 2025 Technical Standards

Purpose of the document

1. PISA Technical Standards are the set of principles on which the OECD Programme for International Student Assessment (PISA) is based. It serves as a foundation of PISA quality assurance processes. The purpose of PISA is to generate an international dataset of a quality that allows for valid cross-national inferences to be made. Following the procedures outlined in this document will ensure that this outcome is achieved.
2. This is a reference document aimed at National Centres implementing PISA in the entities participating in the assessment as well as the international contractors commissioned by OECD for the implementation of the ninth cycle of PISA centrally¹.
3. This document lists the standards for PISA 2025. Four goals are important in PISA: consistency, precision and generalisability of the data and timeliness of the procedures. The standards identify how to achieve these goals. They also support participants and contractors to meet PISA 2025 timelines.
4. *Consistency*: Equivalent data collection in all participating entities (countries/economies) is very important. Data should be collected using the same test materials that were translated with the highest possible degree of *linguistic equivalence*² and/or adapted as appropriate. Comparable samples of each participating entity student population should perform under test conditions that are as similar as possible. Given consistent data collection (and sufficiently high response rates), test results are likely to be comparable across regions and countries. The test results in different countries will reflect differences in the performance of the students measured and will not be caused by factors which are un-related to performance.
5. *Precision*: Processes used in PISA 2025 should minimise the opportunity for variation or error. Both systematic and random errors must be minimised. An increase in precision leads to higher quality results, allows more powerful statistical analyses, and leads to more trustworthy results.
6. *Generalisability*: A sample of students participate in PISA. It is important for this sample to accurately represent the target population. In addition, test and questionnaire materials must be developed in a way that will ensure that the conclusions reached from a given set of data do not simply reflect the setting in which the data were collected but hold for a variety of settings and are valid in the target population at large.
7. *Timeliness*: PISA is a large and complex programme. The tight timelines and budgets in PISA, as well as the sheer number of participating countries, preclude the option of developing and monitoring local solutions to be harmonised at a later stage in the project. Therefore, the standards specify one clear-cut path along which data collection, coding and data submission should progress.

¹ See more about managing structures of PISA in Section 0.

² *Linguistic equivalence*: For assessment instruments, linguistic equivalence refers to (i) semantic congruence; (ii) same quantity and quality of information; (iii) similar register; (iv) replicated reference chains, matches and patterns. For questionnaires, linguistic equivalence corresponds to the shorthand "Ask the Same Question".

8. This document strives to establish a collective agreement of mutual accountability among countries, and of the international contractor towards the countries. It defines each standard and identifies how each standard quality is assured. Quality assurance refers to the processes and procedures which check that PISA 2025 will meet its intended goals.

9. Where standards have been fully met and data quality of the final databases judged as appropriate, the international contractors will recommend to the OECD Secretariat that the data be included in the PISA 2025 database. Where standards have not been fully met or data quality has been questioned, an adjudication process will determine the extent to which the quality and international comparability of the data have been affected or whether additional analysis or evidence are necessary. The result of data adjudication will determine whether the data will be recommended for inclusion in the PISA 2025 dataset.

10. An adjudication process will be used to make this decision. During the adjudication process, the data from each participant will be evaluated against all standards jointly. This process includes considering factors beyond the control of the National Centre, such as a national strike or pandemic. Where agreement between National Project Managers and the international contractors cannot be reached, the OECD will adjudicate and resolve the issues.

11. The PISA 2025 technical standards are benchmarks of best practice. They inform PISA 2025 participants and contractors of expectations. The Standards will be endorsed by the PISA Governing Board. The international contractors will use the standards to support and monitor participants. Contractors will contact a National Centre immediately if any problems are identified and support the National Centre to resolve them if possible.

Format of the document

12. This document is a revision of the Technical Standards for PISA 2022. It implements all salient changes required for PISA 2025 and had been identified by the CSSP Review of the Technical Standards for PISA 2021 [SDD/CSSP(2020)8]. Three types of changes were implemented:

- Structural – the document has been revised to reflect more closely the process of survey implementation.
- Readability – unnecessary complexity has been removed to enhance readability and clarity.
- Technical – technical changes have been made to meet the requirements of PISA 2025.

13. Key definitions are provided as footnotes to facilitate comprehension aid and fluid reading. The glossary is also provided at the end of the document.

14. To facilitate the review of this draft, the tables showing the relationship between the PISA 2022 standards and the standard in the current document are maintained in the accompanying document EDU/PISA/GB(2022)24.

15. Many standards require further reference to the details explained in the various *PISA Operations Manuals*³, which have not yet been prepared. These references are indicated as *Forthcoming* whenever appropriate.

³ *PISA Operations Manuals* – all manuals provided by the international contractors. The preparation of the PISA operations manuals will be carried out by the international contractors and will describe procedures developed by the international contractors. The manuals will be prepared following

Scope

16. The standards in this document apply to data from *adjudicated entities*⁴ that include both participating entities and additional adjudicated entities managed by participating entities. The PISA Governing Board will approve the list of adjudicated entities to be included in a PISA cycle. The standards formulate levels of attainment, while timelines and feedback schedules of both the *adjudicated entities* and the international contractors are defined in the *PISA Operations Manuals*.

1. Target population and assessment

17. **Rationale:** To compare performance, all students that participate in PISA 2025 must come from the same target population of a nearly equivalent age range. This will ensure that results are not influenced by differences in the age of students.

18. To use data from teachers, the optional teacher questionnaire must be administered to the same target population of teachers in every entity participating in the Science Teacher Questionnaire and English Teacher Questionnaire *international options*⁵.

19. Similarly, students participating in the Foreign Language Assessment - English (FLA) *international option* must be selected from the subpopulation of PISA population defined the same way in each participating entity.

20. In addition, test and questionnaire materials must be developed in a way that will ensure that the conclusions reached from a given set of data do not simply reflect the setting in which the data were collected but hold for a variety of settings and are valid in the target population at large.

1.1. Core PISA Desired Target Student Population

Standard 1.1 The PISA Desired Target Population is *agreed upon* through negotiation between the National Project Manager and the international contractors within the constraints imposed by the definition of the *PISA Target Population*. The *Target Population* for PISA starts with students attending all educational institutions located within the adjudicated entity, and in grade 7 or higher. The “standard” PISA target population is further refined to its age basis: students between 15 years and 3 (completed) months and 16 years and 2 (completed) months at the beginning of the testing period.

consultation with participating entities, the OECD Secretariat, the Technical Advisory Group (TAG) and other stakeholders.

⁴ *Adjudicated entity* – a country, geographic region, or similarly defined population, for which the international contractors fully implement quality assurance and quality control mechanisms and endorses, or otherwise, the publication of separate PISA results. A PISA participant may manage more than one adjudicated entity.

⁵ *International options* – optional additional international instruments or procedures offered by the OECD and fully supported by the international contractors.

1.2. Core PISA 2025 Test

Standard 1.2 The core test for PISA 2025 is a computer-based 2-hour test that includes the assessment of Science (major domain), Reading, Mathematics, as well as Learning in the Digital World (LDW). The core PISA test is administered to a sample of students drawn from the PISA target population according to established scientific principles for drawing samples from finite populations, whose standards are described in Section 6 of this document.

1.3. Core PISA 2025 Questionnaires

Standard 1.3 The core PISA questionnaires are also delivered in a computer-based mode and include a half-an-hour Student Questionnaire administered to every participating student and a School Questionnaire administered to school administrators of participating schools. A System-level Questionnaire is also administered.

1.4. Optional PISA 2025 Foreign Language Assessment – English

Standard 1.4 One of the *international options* offered for PISA 2025 participants is the Foreign Language Assessment (FLA) option, which will assess English Language proficiency of PISA students who study, or have studied in the past, English as a foreign language. For the purposes of the FLA in PISA, English is understood as a foreign language if it is formally taught in the educational system and is not the main language of instruction (i.e. is not the language of the PISA Reading test).

1.5. Desired Target Student Population for the Foreign Language Assessment – English

Standard 1.5 The FLA desired target population is comprised of the students from a subpopulation of the PISA desired target population agreed upon between the international contractors and the National Centre. Students from this subsample, who studied English as a foreign language prior to the testing year for a minimum period of one academic year in institutions located within the educational system will be considered eligible for the FLA.

Educational systems that choose to participate in this international option but do not mandate English as a foreign language at any educational level lower than the level where majority of the desired PISA target population is found must be aware that they may require oversampling to be able to secure sufficient number of responses to the FLA items required for analysis and reporting of results.

1.6. Optional PISA 2025 Questionnaires

Standard 1.6 In addition to the core questionnaires, participating entities may choose to administer some of the optional questionnaires. The final decision on the options supported by the contractors (i.e. *international options*) will depend on the number of participants opting for them. The choice of *international option* questionnaires is limited in PISA 2025 to the following:

- Information and Communications Technology (ICT) Familiarity Questionnaire which is administered to the students participating in the core computer-based PISA assessment.
- A Foreign Language Questionnaire which is administered to students participating in the optional FLA Assessment.
- A Learning in the Digital World Questionnaire which is administered to students participating in the innovative domain.

In addition, PISA 2025 also offers:

- A paper-based Parent Questionnaire which is administered to parents of the students participating in the PISA assessment.
- A computer-based Teacher Questionnaire administered to science and/or foreign language teachers (eligible teacher population defined in Standard 1.7).

1.7. Optional PISA Desired Target Science Teacher Population

Standard 1.7 Teachers who are teaching Science in the *PISA modal grade*⁶ in the current academic year comprise the teacher target population for the purpose of participating in the Science Teacher Questionnaire international option. For some adjudicated entities, the teacher population may be expanded to include those teaching Science in the next largest PISA grade if this grade also contains more than 30% of the PISA student population. If there are two grades with at least 30% of PISA students enrolled in each grade, then there are two modal grades.

1.8. Optional PISA Desired Target English Teacher Population

Standard 1.8 In the participating entities, opting for FLA, teachers who are teaching English in the *PISA modal grade* in the current academic year comprise the teacher target population for the purpose of participating in the English Teacher Questionnaire *international option*. For some *adjudicated entities*, the teacher population may be expanded to include those teaching English in the next largest PISA grade if this grade also contains more than 30% of the PISA student population. If there are two grades with at least 30% of PISA students enrolled in each grade, then there are two modal grades.

⁶ PISA modal grade - the grade containing the majority of the PISA student population.

1.9. Assessment Development

Standard 1.9 All assessment and background core and international option instruments are developed by international contractors using agreed upon, established, and professionally recognised principles of test and questionnaire development. Principles of established, and professionally recognised principles of test and questionnaire development include, but are not limited to:

- The tasks must elicit responses that can provide evidence of the test takers' capacity in the domain being assessed.
- They must draw on knowledge and understanding that are intrinsic to the domain
- They must be in a format that is suited to the kind of question being asked, rather than unnecessarily involving extrinsic skills.
- They must, as a set, provide coverage of the area of learning that is under investigation
- They must be practical to administer⁷.

1.10. Modes of Assessment

Standard 1.10 PISA 2025 will continue to support two possible modes of assessment, *computer-based* (CBA) and *paper-based* (PBA) with CBA being the recommended mode.

1.11. Test Designs

Standard 1.11 PISA 2025 supports five assessment designs developed for the **Main Survey** between which each National Centre must select one:

- *Preferred CBA* design includes core domains and Learning in the Digital World.
- *Core CBA* design includes core domains only (CBA).
- *Preferred CBA design with FLA* includes *core domains*, Learning in the Digital World and Foreign Language Assessment - English.
- *Core CBA design with FLA* includes *core domains* and the Foreign Language Assessment – English optional domain.
- *PBA design* includes *core domains*.

⁷ More details will be provided in the forthcoming Quality Standards being developed by the PISA Research, Development and Innovation (RDI) Programme.

1.12. Language of Assessment

Standard 1.12 The PISA test is administered to a student in a language of instruction provided by the sampled school to that sampled student in the major domain (Science) of the test.

If the language of instruction in the major domain is not well defined across the set of sampled students then, if *agreed upon*, a choice of language can be provided, with the decision being made at the student, school, or National Centre level. Agreement with the international contractor will be subject to the principle that the language options provided should be languages that are common in the community and are common languages of instruction in schools in that *adjudicated entity*.

If the language of instruction differs across domains then, if agreed upon, students may be tested using assessment instruments in more than one language on the condition that the test language of each domain matches the language of instruction for that domain. Information obtained from the *Field Trial*⁸ will be used to gauge the suitability of using assessment instruments with more than one language in the Main Survey.

In all cases, the choice of test language(s) in the assessment instruments is made prior to the administration of the test.

1.13. Testing Period

Standard 1.13 Unless otherwise agreed upon, the testing period:

- is no longer than ten consecutive weeks in duration for computer-based testing participants,
- is no longer than six consecutive weeks in duration for paper-based testing participants,
- does not coincide with the first six weeks of the academic year, and
- begins exactly three years from the beginning of the testing period in the previous PISA cycle.

⁸ The Field Trial is the first period of data collection. The purpose of the Field Trial is:

1. to collect data to ensure that the instruments developed for the Main Survey contain test and questionnaire items that are sound in all countries/economies and that they are properly translated; and
2. to test the operational procedures.

1.14. Documentation Required for Quality Assurance of Population and Assessment Standards

- Target population agreed with contractors and checked by the sampling contractor's software as a part of Sampling Task 1
- Test and questionnaire designs created by the contractors, recommended by the Technical Advisory Group and approved by the PGB⁹
- Languages by assessment *agreed upon* by contractors as a part of the Sampling Task 0.

2. Management Structures

21. **Rationale:** PISA management structures are established to ensure that all PISA operations proceed smoothly. They set benchmarks of best practice and ensure that an international dataset of a quality that allows for valid cross-national inferences to be made is created and analysed.

2.1. PISA Governing Board (PGB)

Standard 2.1 Countries with full membership status in PISA (currently the 38 OECD countries, plus Brazil and Thailand) are responsible for PISA at the policy level. Through the PGB, they determine PISA's policy priorities and oversee adherence to these priorities during its implementation. The PGB determines policy objectives, establishes priorities for indicator development and reporting, and specifies the scope of work. The PGB also works with the OECD Secretariat to ensure compliance with objectives, milestones and study parameters.

2.2. The OECD Secretariat

Standard 2.2 The OECD Secretariat is responsible for PISA's overall management, acting as the Secretariat of the PGB and as the interface between the PGB and the PISA Contractors. It monitors the implementation of the project and builds consensus among participating countries/economies on policy issues through the PGB. The OECD Secretariat produces the indicators and analyses and prepares the international reports in collaboration with participating entities.

⁹ Questionnaires be reviewed by the Questionnaire Expert group, and new science items be reviewed by the Science Expert Group.

2.3. Advisory Groups

Standard 2.3 Various expert groups have been established to provide substantive and technical advice on specific aspects of PISA.

- The **Technical Advisory Group** advises on the technical features of the assessment, such as scaling and sampling methodologies, and has a role in ensuring the technical quality of the data.
- The **Subject Matter Expert Groups** and **Questionnaire Expert Group** are responsible for linking the policy objectives identified by the PGB with expertise in the relevant area, as well as establishing consensus on content and technical issues raised by participating entities within the larger framework, and the objectives of the overall implementation strategy.

2.4. International Contractors

Standard 2.4 The international contractors for PISA 2025 are:

- Core 1 – ACER¹⁰, in cooperation with cApStAn¹¹, HallStat¹² and OAT¹³, is the contractor for design, development and implementation and will play a key role in PISA 2025 with responsibility for the development and implementation of large parts of the survey and is the contractor which, in close co-operation with the OECD Secretariat, will manage and co-ordinate the work across all core contractors.
- Core 2 – Oxford University Press is the contractor for English Language Test development.
- Core 3 – Westat, in co-operation with ACER, is the contractor for sampling.
- Core 4 – ACER, in cooperation with cApStAn, HallStat and TAO, is the contractor for developing the PISA 2025 innovative domain (Learning in the Digital World), which aims to strengthen our understanding of what skills and attitudes students need to develop in order to become autonomous, lifelong learners in increasingly digital education and work environments.

As specified in the contracts for the implementation of the ninth cycle of the OECD Programme for International Student Assessment, the international contractors take responsibility for developing and implementing procedures for assuring data quality.

2.5. National Centres

Standard 2.5 Each participating entity should establish a National Centre¹⁴ and upload contact information for all National Centre team members to the *PISA Connect*¹⁵.

¹⁰ Australian Council for Educational Research.

¹¹ cApStAn is responsible for linguistic quality control.

¹² PISA 2025 Translation Referee.

2.6. Documentation Required for Quality Assurance of Management Structures

- Monitoring by the participating National Centres (via the OECD Secretariat) of the adherence to the standards by all international contractors¹⁶.
- Mediation and monitoring of the National Centres' activities specified in this document by the international contractors.
- National Centres' details on *PISA Connect*.

3. Communication protocols

22. **Rationale:** given the tight schedule of the project, delays in communication between the National Centres and the international contractors should be minimised. Therefore, National Centres need continuous access to the various resources provided by the contractors. Response timelines and feedback schedules for the National Centres and the international contractor are further specified in the Tasks section of *PISA Connect*.

3.1. Communication with the PISA Governing Board, the OECD Secretariat and the PISA Contractors

Standard 3.1 PISA Contractors do not have a direct relationship or direct contact with the PISA Governing Board (PGB) unless invited to have one. Rather, PISA Contractors report to the PGB through the OECD Secretariat and implement the project on the PGB's behalf. Therefore, if NPMs wish to access PGB documents or to have matters officially addressed at the PGB meeting on behalf of their participating entity, they need to discuss them with their national PGB representative.

¹³ OAT - Open Assessment Technologies, owners of the TAO (Test Assisté par Ordinateur) platform and (Open Assessment Technologies) PISA test platform provider.

¹⁴ The details about National Centres and their functions are provided in the National Project Manager (NPM) Manual.

¹⁵ PISA Connect is the central website for PISA 2025 and is maintained by the Core 1 Contractor. It is one of the main channels for communication between the PISA Contractors and participating National Centres.

¹⁶ The OECD will also adjudicate any issues resulting from non-compliance with the technical standards that cannot be resolved between participating countries and the contractors.

3.2. Communication with Subject Matter Expert Groups and the Questionnaire Expert Group

Standard 3.2 PISA Contractors are responsible for convening the Subject Matter Expert Groups and the Questionnaire Expert Group. This includes providing information to expert group members and making arrangements for expert group meetings. Information from National Centres that is forwarded to expert groups includes national item reviews and responses collected through the Field Trial and Main Survey review exercises. Where appropriate, the PISA Contractors also forward ad hoc advice and comments received from National Centres.

3.3. Communication with the Technical Advisory Group

Standard 3.3 As with the previous cycle, the OECD Secretariat is responsible for all aspects related to the Technical Advisory Group and its meetings.

3.4. Contractors' Communication with the National Centres

Standard 3.4 The international contractors ensure that qualified staff are available to respond in English to requests by the National Centres during all stages of the project. The qualified staff:

- Are authorised to respond to National Centre queries,
- Acknowledge receipt of National Centre queries within one working day,
- Respond to coder queries from National Centres within one working day,
- Respond to other queries from National Centres within five working days, or, if processing the query takes longer, give an indication of the amount of time required to respond to the query.

3.5. National Centres' Communication with Contractors

Standard 3.5 The National Centre ensures that qualified staff are available to respond to requests in English to the international contractors during all stages of the project. The qualified staff:

- are authorised to respond to queries,
- are able to communicate in English,
- acknowledge receipt of queries within one working day, and
- respond to queries from the international contractors within five working days, or, if processing the query takes longer, give an indication of the amount of time required to respond to the query.

3.6. National Centres' Communication with Participating Institutions

Standard 3.6 High levels of student and school participation in PISA are very important. It is therefore appropriate for national centres to prepare communication materials for participants with the intent to raise awareness, to set out what is involved in participating in PISA and to encourage participation in the survey. These materials may include general information about the survey, what students and schools might expect on the test day.

To assist with this, an OECD set of released test materials will be provided for this purpose. The use of sample test items in informational materials could also serve to prepare students for the format of the PISA test in order to reduce potential test anxiety and help the students focus on the subject matter content when taking the test.

No PISA test items can be disclosed to participating institutions. No PISA test items can be disclosed to students before the test being administered. Only the released test materials provided by the OECD may be disclosed.

3.7. Communication with the General Public

Standard 3.7 *PISA Connect*, the PISA 2025 project website, maintained by Core 1 contractors does not allow for public access because it contains confidential materials, but public materials are available through the OECD PISA website at <http://www.oecd.org/pisa>.

The PISA Contractors do not engage directly with the general public, except with the express permission of the OECD Secretariat. Otherwise, all information to the general public is provided through the OECD or through National Centres.

While National Centres need to actively engage the general public, in particular the education communities within their participating entities, they can only use PISA information already authorised and released by the OECD for public use. It is essential that all embargoes on project information and data be respected.

National Centres develop appropriate mechanisms in order to promote participation, effective implementation, and dissemination of results amongst all relevant national stakeholders.

4. Participation and Timelines

23. **Rationale:** Attendance at National Project Managers and training meetings is required as these represent a key component of participating in PISA. Important information is shared and discussed and training in data management, sampling, translation/adaptation, computer systems, and coding is conducted at these international meetings. These also allow for individual consultation and communication with the international contractors, which is often very helpful.

24. To meet the requirements of the work programme, and to progress according to the timelines of the project, the international contractors will need to be notified on time

about *national and international options*¹⁷ in which each National Centre is going to participate. For the same reason international contractors will need to receive a number of materials on time.

25. After all options are *agreed upon* and all preparatory documentation is submitted, the National Centres must participate in the Field Trial, which gives participating entities the opportunity to try out the logistics of their test procedures and allows the contractors to make detailed analyses of the *items* so that only suitable ones are included in the Main Survey.

26. Standards for other activities are outlined in the following sections of this document.

4.1. Frequency and Length of the International Meetings

Standard 4.1 Up to 6 international meetings are planned per cycle. The length of these meetings vary from 3 to 5 days.

4.2. Meeting attendance

Standard 4.2 Representatives from each National Centre are required to attend all PISA international meetings including National Project Manager meetings, coder training, and any separate within-school sampling training, and data management training, as necessary.

Based on the meeting type and hotel arrangements, the OECD Secretariat may, on the request of the international contractors, set a limit to the number of representatives per participating entity that can attend NPM meetings. *Participating entities* with separate *adjudicated entities* will have the possibility to send teams from all entities.

¹⁷ A *national option* occurs if:

- a) a National Centre administers any additional instrumentation, for example a test or questionnaire, to schools or students that are part of the PISA international sample. Note that in the case of adding items to the questionnaires, an addition of five or more items to either the school questionnaire or the student questionnaire is regarded as a national option; or
- b) a National Centre administers any PISA international instrumentation to any students or schools that are not part of an international PISA sample (age-based or grade based) and therefore will not be included in the respective PISA international database; or
- c) a National Centre administers any PISA international option only in some, not all, jurisdictions. The participating entity will in this case sign up for the international option with the OECD, as if it was administered in the entire jurisdiction, and the additional work involved with administering the international option to part of the jurisdiction only is considered a national option.

International options are optional additional international instruments or procedures offered by the OECD and fully supported by the international contractors.

4.3. Requirements for meeting attendees

Standard 4.3 Representatives from each National Centre who attend international meetings must be able to work and communicate in English.

4.4. Feedback from National Centres to the International Contractors

Standard 4.4 National Centres provide timely feedback to the international contractors on the domain frameworks, development of instruments, the adaptation of instruments, and other domain-related matters that represent the perspectives of the relevant national stakeholders as defined in the PISA Schedule and the NPM Manual.

4.5. Notification of International Options

Standard 4.5 The National Centre notifies the OECD Secretariat of its intention to participate in specific *international options* (including their choice of a test design) three months prior to the start of the translation period. *International options* can be dropped between the **Field Trial** and the **Main Survey**, but not added.

4.6. Notification of National Options

Standard 4.6 *National options* are agreed upon with the international contractors before 1 November in the year preceding the **Field Trial** and confirmed before 1 November in the year preceding the **Main Survey**.

4.7. Implementation of national and international options

Standard 4.7 Only *national and international options* that are *agreed upon* between the National Centre and the international contractors are implemented.

4.8. Submission of Materials

Standard 4.8 All documents specified in the *PISA Operation Manuals* are submitted to the international contractors in accordance with agreed timelines.

The operation manuals specifying the documentation to be submitted and the timelines for submission include but are not limited to the:

- NATIONAL PROJECT MANAGER MANUAL
- SCHOOL SAMPLING PREPARATION MANUAL
- TRANSLATION AND ADAPTATION GUIDELINES
- DATA MANAGEMENT MANUAL

4.9. Translation Plan

Standard 4.9 An *agreed upon* Translation Plan will be negotiated between each National Centre and the international contractors in accordance with agreed timelines and with the required translation and adaptation procedures.

4.10. Field Trial Participation

Standard 4.10 Participating entities must successfully implement the Field Trial before they are able to participate in the 2025 Main Survey. Unless otherwise *agreed upon* a Field Trial should occur in an assessment language if that language group represents more than 5% of the target population.

4.11. Documentation Required for Quality Assurance of Participation and Timeliness

- Meeting attendance records
- Agreed upon Translation Plan
- International contractors' records from communications, forms, or documents
- Field Trial data

5. Security of Materials and Data Protection

27. **Rationale:** The goal of the PISA assessment is to measure the literacy levels in the content domains. Prior familiarisation with the test materials, or training to the test, will heavily degrade the consistency and validity of the data. In extreme case, the results would only reflect how well participants are able to memorise the test items. Confidentiality is extremely important to be able to assess the competencies obtained during schooling rather than short-term learning success, and to make valid international comparisons.

28. The OECD is committed to protecting the personal data it processes, in accordance with its Personal Data Protection Rules. The OECD, countries and contractors must protect the personal data of participants collected during PISA, ensuring that all data is stored and processed in a secure and standardised manner.

5.1. PISA Materials Designated as Secure

Standard 5.1 PISA materials designated as secure are kept confidential at all times. Secure materials include all test materials, data, and draft materials. In particular:

- no-one other than approved project staff and participating students during the test session is able to access and view the test materials,
- no-one other than approved project staff will have access to secure PISA data and embargoed material, and
- formal confidentiality arrangements will be in place for all approved project staff.

5.2. Information and Training Prior to the Test Session

Standard 5.2 Participating schools, students and/or teachers should only receive general information about the test prior to the test session, rather than formal content-specific training. In particular, it is inappropriate to offer formal training sessions to participating students, in order to cover skills or knowledge from PISA test items, with the intention to raise PISA scores.

It is unnecessary to train students for interacting with the student interface, with different item types or response formats prior to the testing session. All PISA test materials and procedures are accompanied by detailed instructions as well as by orientation modules at the beginning of each test session to ensure that participants are familiarised with the interface and with all the question formats that they will encounter.

“Formal training sessions” refers to training that relies on standardised instructional material and involves feedback provided by an instructor, machine, or other training participants. Formal training sessions may include (but are not limited to) lectures, practice tests, drills, or online instruction modules.

The general information about the survey shared with participants may include information about the length of the test, the general scoring principles applied to missing and incorrect answers, data protection and confidentiality of results. It may include an OECD set of released test materials prepared for this purpose, but should not assemble sample items in PISA-like test forms with the intent to teach or prepare students for participation in PISA.

5.3. Secure Installation of ACER Maple by the National Centres

Standard 5.3 ACER Maple is the within-school sampling and data management software. National Centres must install ACER Maple as per the installation instructions in the Data Management Manual, and implement the following security requirements,

- National Centres must ensure any computers hosting or accessing ACER Maple are physically secure. This means that people who are unauthorised to access Maple data must not have physical access to these computers.
- all computer hard drives are encrypted;
- the hosting computer firewall is configured to allow the HTTPS port only to be accessible from other computers;
- all computers have antivirus systems which are kept up to date;
- the computers are subject to a patching schedule for the operating system and any other applications;
- ACER Maple must not be deployed so it is accessible from outside the LAN or via the Internet.
- National Centres are responsible for applying ACER Maple updates within one week of receiving a new release.
- The ACER Maple Virtual Machine must be installed on the hard drive of the host computer and not on cloud servers or removable media such as USB drives.

5.4. Secure Maintenance of ACER Maple Data in the National Centres

Standard 5.3 Backups of ACER Maple data must be performed regularly and encrypted. If removable media such as USB drives are used to perform the backup, it must be physically secured against unauthorised access.

The National Centre is responsible for the security of any data exported from ACER Maple (this includes back-ups made to external HDs or USBs). Data must not be imported into other software for any purposes other than those specified in the data management manual.

National Centres must discourage remote connections to the ACER Maple Virtual Machine (VM) via Virtual Private Networks (VPN) for example. If however, there is no other alternative:

- The National Centre must ensure only approved computers meeting the criteria above are accessing ACER Maple over VPN
- The National Centre is responsible for VPN configuration (ACER cannot provide helpdesk support)
- The National Centre assumes responsibility for the increased risk to the security of PISA data from allowing users to access ACER Maple via VPN.

5.5. Processing of Confidential Data by National Centres

Standard 5.5 PISA field operation forms such as lists of students/teachers eligible for sampling, tracking forms, login forms must be kept secure and made available only to the authorised personnel such as *Test Administrators*¹⁸, *School Co-ordinators*¹⁹ or *School Associates*²⁰ and authorised personnel of the National Centre processing PISA data.

5.6. PISA 2025 Platform Data Protection

Standard 5.6 The system and support architecture of the PISA 2025 Platform fully complies with the applicable Privacy Law, including but not limited to GDPR legislation in the European Union, as well as the OECD's Personal Data Protection Rules. All data collection, processing and storing will be done in compliance with the ACER Information Security Policies which have been certified by an independent external auditor as compliant with international standard for information security management systems ISO 27001. The ACER Information Security Management System (ISMS) meets all ISO 27001 clauses and the 14 control categories described in Annex A of the standard. The ACER ISO 27001 certificate number is 633-I-1 and can be verified by searching for "Australian Council for Educational Research" on this website [JAS ANZ \(jas-anz.org\)](https://www.jas-anz.org).

ACER security policy requires each project to produce a System Security Plan (SSP) and a Data Protection Plan (DPP). The System Security Plan describes the controls used to secure data for each system used in the solution. The Data Protection Plan describes how the data will be secured across the solution including controls for securing data in transit, at rest and access control. The DPP will also describe how the data held within the PISA 2025 Platform will be pseudonymised (the link between the student's name and the student ID is retained by the National Centre and is not included in the PISA 2025 Platform) to further enhance the levels of security for the purpose of the assessment data collection and will only be used for the purposes of administering the PISA 2025 cycle. Other information (e.g. sampling linking files) that facilitates the data collection may be retained in the schools or National Centres, but not in the PISA 2025 Platform. The Data Protection Plan will define materials to be deleted/shredded/returned including all tracking instruments and all respondent lists.

¹⁸ *Test administrator* – a person who is trained by the National Centre to administer the PISA test in schools.

¹⁹ *School Co-ordinator* (SC) – a person at a school who acts as a liaison between the school and the National Centre to prepare for the assessment in the school.

²⁰ *School Associate* (SA) – a person at a school who acts as a liaison between the school and the National Centre to prepare for the assessment and who administers the assessment to students on the day of the assessment.

5.7. Data Protection Information Made Available to all Participants

Standard 5.7 The Data Protection Plan will define the requirement for each National Centre to make data protection information available to all participants, which at least includes:

- Contact details of the National Centre.
- Contact details of the OECD’s Data Protection Officer and Data Protection Commissioner.
- The purpose of the processing of the data.
- Recipients of the data, including any international organisations or third party (this includes the PISA contractors and any national contractors).
- The storage and retention period of data.
- The existence of the rights of data subjects, including the timeline for facilitating these requests.

The requirements will be implemented via the PISA Operation Manuals.

5.8. Facilitation of Participant Data Rights

Standard 5.8 The Data Protection Plan will define the requirement for National Centres to facilitate requests from participants to exercise their data rights. This includes the following two items.

- Data access requests will be possible using the raw data from the assessment. No scaled data will be provided in breach of the PISA data embargo.
- Data erasure requests will be possible for a limited period before submission to the Contractors. This is to be decided by each National Centre, with two options, up to the submission of Sampling Task 12 or to upload of student data files to the Open Ended Coding System (OECS).

The Data Protection Plan will define the requirement for each National Centre to retain and update a log of completed data requests for data erasure and to facilitate quality control processes. This information will be submitted to the PISA contractors in a timely manner to comply with the requests and for the purpose of data management and sampling processes.

These requirements will be defined in the Data Protection Plan but implemented via the PISA Operation Manuals.

5.9. Documentation Required for Quality Assurance of Security of Materials and Data Protection

- Security arrangements as specified in the PISA operations manuals or agreed upon variation
- National Centre Quality Monitoring
- PISA Quality Monitor feedback and Data Collection Forms (only for Main Survey)
- Field Trial and Main Survey Review Forms

6. Sampling

29. **Rationale:** To be able to draw conclusions that are valid for the entire population of fifteen-year-old students, a representative sample shall be selected for participation in the test. The size of this representative sample should not be too small, in order to achieve a certain precision of measurement in all countries. For this reason, minimum numbers of participating students and schools are specified.

30. The procedures for drawing the samples used in the study are crucial to data quality. The goal of the project is to collect data that are representative for the population at large, in such a way that the results are comparable, reliable, and valid. To reach these goals the sampling procedures must follow established scientific principles for drawing samples from finite populations.

31. In the sample design commonly adopted in PISA, first educational institutions are sampled by the contractor and then students that belong to PISA desired target population are sampled from these institutions by National Centres according to *agreed upon*, established, and professionally recognised principles of scientific sampling.

6.1. Institution Sampling Principles

Standard 6.1 For the **Main Survey**, educational institutions are sampled using *agreed upon*, established, and professionally recognised principles of scientific sampling. Principles of scientific sampling include, but are not limited to:

- The identification of appropriate stratification variables to reduce sampling variance and facilitate the computation of non-response adjustments.
- The incorporation of an agreed target cluster size of desired PISA target student population (and eligible teacher population, when applicable) from each sampled school.

6.2. Institution Sampling Execution

Standard 6.2 Unless otherwise agreed upon, the international contractors will draw the school sample for the Main Survey. The convenience sample drawn by the National Centre for the Field Trial will be reviewed and agreed upon by the international contractor.

6.3. Student Lists for Within-Institution Sampling

Standard 6.3 Student lists for within-institution sampling:

- contain the full desired PISA target student population in sampled schools, and
- are collected no earlier than 8 weeks prior to the start of test administration or later, unless discussed with the sampling contractor and agreed upon.

6.4. Student Sampling Principle and Execution

Standard 6.4 Students are sampled by *National Centres* from the student lists collected as specified in Standard 6.3 using the within-institution sampling and data management software ACER Maple configured by contractors for this purpose according to *agreed upon*, established, and professionally recognised principles of scientific sampling.

6.5. Alternative Execution of Sampling Procedures

Standard 6.5 Whenever a participant:

- chooses to draw the school sample, the National Centre provides the international contractor with the data and documentation required for it to verify the correctness of the sampling procedures applied.
- chooses not to use the sampling contractor's software to draw the student sample, the National Centre provides the international contractor with the data and documentation required for it to verify the correctness of the sampling procedures applied.

Any exceptional costs associated with verifying a school sample taken by the National Centre, or a student sample selected other than by using the data management software ACER Maple will be borne by the National Centre.

6.6. Alternative Methods of Drawing Samples

Standard 6.6 Agreement with the international contractor on alternative methods of drawing samples will be subject to the principle that the sampling methods used are scientifically valid and consistent with PISA's documented sampling methods.

6.7. Eligibility for PISA

Standard 6.7 Unless otherwise agreed upon only students sampled as described in Standards 6.1 - 6.3 participate in the test.

6.8. PISA Defined Target Population

Standard 6.8 The *PISA Defined Target Population* covers 95% or more of the PISA Desired Target Population. That is, *school-level exclusions* and *within-school exclusions* combined do not exceed 5%.

- *School level exclusions* are restricted to:
 - schools that are exclusions due to geographical inaccessibility, extremely small school size, administration of PISA would be not feasible within the school, and other agreed upon reasons and whose students total to less than 0.5% of the PISA Desired Target Population; and
 - schools containing only students that would be within-school exclusions and that total to less than 2.0% of the PISA Desired Target Population.
- *Within-school exclusions* total less than 2.5% of the PISA Desired Target Population – these exclusions could include, for example:
 - students who are functionally disabled in such a way that they cannot take the PISA test. Functionally disabled students are those with a moderate to severe permanent physical disability.
 - students with a cognitive, behavioural or emotional disability confirmed by qualified staff, meaning they cannot take the PISA test. These are students who are cognitively, behaviourally, or emotionally unable to follow even the general instructions of the assessment.
 - students with insufficient assessment language experience to take the core PISA test. students who have insufficient assessment language experience are those who meet all the following three criteria:
 - they are not native speakers of the assessment language,
 - they have limited proficiency in the assessment language, and
 - they have received less than one year of instruction in the assessment language.
 - there are no materials available in the language in which the student is taught.
 - they cannot be assessed for some other reason as agreed upon.

6.9. Overall Field Trial Sample Size of Assessed Students

Standard 6.9 The **Field Trial** student sample size will be a function of the test design and language of assessment:

- The sample size will be set to achieve the standard of 200 student responses per item in largest language of assessment in each *adjudicated entity*.
- For all other assessment languages that apply to at least 5% of the target population, the Field Trial student sample will be a minimum of 100 students per item.
- For additional adjudicated entities, where the assessment language applies to at least 5% of the target population in the entity, the Field Trial student sample will be a minimum of 100 students per item.

6.10. Overall Main Survey Sample Size of Assessed Students

Standard 6.10 The Main Survey student sample size depends on the test design (see Standard 1.11) opted for by participating entities:

Preferred CBA design and *Core CBA design* require a minimum of 6 300 assessed students, and 2 100 for additional adjudicated entities, or the entire PISA Defined Target Population where the PISA Defined Target Population is below 6 300 and 2 100 respectively.

Preferred CBA design with FLA and *Core CBA design with FLA* require a minimum of 7 950 assessed students (i.e. additional 1 650 for FLA) or the entire PISA Defined Target Population where the PISA Defined Target Population is below 7 950.

PBA design require a minimum of 5 250 assessed students or the entire PISA Defined Target Population where the PISA Defined Target Population is below 5 250.

In participating entities where the PISA defined target population is less than required by selected test design, the census of the PISA defined target population will be assessed.

6.11. Institution Sample Size

Standard 6.11 To ensure the established, and professionally recognised principles of scientific sampling (see Standard 6.2), the institution sample size for the Main Survey needs to result:

- in a minimum of 150 participating institutions, and 50 participating institutions for additional *adjudicated entities*, or
- all institutions that have students in the PISA Defined Target Population where the number of institutions with students in the PISA Defined Target Population is below 150 and 50 respectively.

Countries with less than 150 institutions, but which have more students than the required minimum student sample size, can be permitted, if *agreed upon*, to take a smaller sample of institutions while still ensuring enough sampled PISA students overall.

6.12. Minimum Student Target Cluster Size

Standard 6.12 To ensure a good spread of all assessment elements across institutions, the minimum acceptable sample size in each institution is 25 students per institution (all students in the case of institution with fewer than 25 eligible students enrolled).

In determining the target cluster size for a given participating entity, or stratum within a participating entity, it is necessary to ensure that the minimum sample size requirements for both institutions and students will be met.

6.13. Institution Response Rate

Standard 6.13 For the Main Survey, the data from institutions where the (unweighted) PISA student response rate or the (unweighted) FLA student response (if applicable) is greater than 33% will be included in the PISA and FLA datasets and the institution counted as a respondent. Otherwise, the institution will be a non-respondent, and no student, institution or teacher data will be retained.

The final weighted institution response rate is at least 85% of sampled eligible and non-excluded institutions. If a response rate is below 85% then an acceptable response rate can still be achieved through agreed upon use of replacement institutions (see School Sampling Guidelines for details).

6.14. Student Response Rate

Standard 6.14 PISA students sampled for core PISA assessment or PISA international options are considered to be respondents and included in the analysis if they responded to a minimum of five cognitive items or a combination of at least one cognitive item and all questionnaire items which contribute to the socio-economic index computation.

The final weighted student response rate is at least 80% of all students sampled for PISA assessments from PISA defined target population across responding schools.

The final weighted student response rate is at least 80% of all students sampled from FLA target population across responding schools with FLA-eligible students.

6.15. Questionnaire Data Treatment in OECD Reports

Standard 6.15 Students counted as respondents according to Standard 6.14.

Teachers recorded in the database as completing at least one valid response will be counted as respondents.

Analyses based on questionnaire data that do not link to a weighted 75% of the target population shall be flagged or replaced by a missing code in OECD reports.

6.16. Documentation Required for Quality Assurance of Sampling

- Sampling procedures as specified in the PISA operations manuals
- School sample drawn by the international contractors (or if drawn by the National Centre, then verified by the international contractors)
- Student sample drawn through the sampling contractor's software (or if drawn by other means, then verified by the international contractors)
- Sampling forms submitted to the international contractors
- Main Survey Review Form

7. Translation and Adaptation of Tests, Questionnaires and School-Level Materials

32. **Rationale:** to validly compare performance across countries, all assessment instruments and other survey materials must be as linguistically equivalent as possible. In fact, it is of utmost importance to provide uniform information to the students of all participating entities. Therefore, not only the assessment instruments, but also the instructions given to the students and the procedures of data-collection must be consistent across participating entities and languages.

33. To achieve this goal, other individuals who play a key role in the data-collection process, i.e. the *Test Administrators*, *School Coordinators*, and *School Associates*, should receive uniform information and training in all participating countries.

7.1. Test Items Used in Previous Cycles

Standard 7.1 The majority of test items used in previous cycles will be administered unchanged from their previous administration, unless amendments have been made to source versions or outright errors have been identified in the national versions. A change in assessment delivery platform and in aspect ratio to 16:9 will result in a slightly different layout of the assessment screens in PISA 2025 but they will be functionally equivalent to those in the previous PISA cycles. The display of trend items in the PISA 2025 will be quality assured in English version by the Core 1 Contractor and by National Centres for all other languages.

7.2. Questionnaire Items Used in Previous Cycles

Standard 7.2 National versions of questionnaire items used in previous cycles will be administered unchanged from their previous administration, unless amendments have been made to source versions, outright errors have been identified in the national versions, or a change in the national context calls for an adjustment.

7.3. Adaptations to the Source Versions of Tests and Questionnaires

Standard 7.2 The national test and questionnaire versions must be as linguistically equivalent to the source versions²¹ as possible. If any adaptations to the local context and usage are required in the tests, they must be documented by the PISA participant and validated by the international contractors. If any adaptations to the local context and usage are required in the questionnaires, they must be agreed upon with the international contractors.

7.4. Adaptations to the School-level Materials

Standard 7.4 The national versions of the school-level materials²² must be consistent with the English source versions. If any adaptations to the local context are required, they must be agreed upon with the international contractors.

²¹Source versions of the assessment instruments are provided in English and in French by the international contractors according to contractual specifications.

²² The key *school-level materials* include School Co-ordinator Manual and Test Administrator Manual or School Associate Manual; as well as Test administration scripts and forms defined in these manuals.

7.5. Translation of Assessment Materials

Standard 7.5 The following international source versions are translated or adapted from the source version(s), from a borrowed version, or from a centrally produced common reference version into the assessment language by the participating entities and verified by the contractors for languages administered to more than 10% of the target population in order to be as linguistically equivalent as possible to the international source versions..

- All administered assessment instruments
- All administered questionnaires
- The Test Administrator script from the Test Administrator (or School Associate) Manual
- The Coding Guides (unless otherwise agreed upon).

7.6. Translation of School-level Materials

Standard 7.6 Unless otherwise *agreed upon*, school-level materials are translated/adapted into the assessment language. Translation/adaptations must be functionally equivalent to the international English *source versions*.

7.7. Verification of translated materials

Standard 7.7 Questionnaire and School-level materials that require verification are translated and submitted for linguistic verification only after all *adaptations* have been *agreed upon*. An ***adaptation*** is an intentional addition to, deletion from or deviation from the international source version, made to conform to local usage or context; to maintain equivalence where a straightforward translation cannot ensure equivalence; or to collect country-specific data in addition to data for the international dataset.

Adaptations made to cognitive assessment materials that require verification are documented before these materials are submitted for linguistic verification. The adaptation approval procedures are described in more details in the National Project Manager Manual and in the Translation and Adaptation Guidelines.

7.8. Documentation Required for Quality Assurance of Translation and Adaptation

34. The documentation listed in this standard will be applied to quality assurance of instruments that are in a language that is administered to more than 10% of the target population:

- *Agreed upon* Translation Plan, developed in accordance with the specifications in the PISA operations manuals, that requires double translation by independent translators followed by reconciliation for any newly translated questionnaires and cognitive instruments; and a thoroughly documented adaptation process for any materials adapted from one of the source versions, from a common reference version, or from verified materials borrowed from another participating entity.
- *Agreed upon* Questionnaire Adaptation Spreadsheet (QAS)
- Test Adaptation Spreadsheets (TAS) and other monitoring tools in which adaptations to assessment units, orientation and help files and coding guides are documented. Adaptations will be checked by international verifiers for compliance with the PISA Translation and Adaptation Guidelines, and the verifiers' recommendations will be vetted by the translation referee.
- Verifier Reports
- Submitted final materials as defined in Standard 9.8
- **Field Trial** and **Main Survey** Review Forms
- Item and scale statistics generated by the international contractors (assessment materials and questionnaires).

8. Computer-based Assessment: Testing of National Software Versions and Technical Support

35. **Rationale:** participating entities administering PISA assessment in the computer-based mode must thoroughly test and validate the implementation of the national version and adaption of cognitive and questionnaire assessment material, in digital platform that are used to deliver the PISA computer-based assessment (CBA) in schools. Participating entities are also primarily responsible for resolving PISA-related operational issues in their countries, including hardware issues and provision of technical support to schools and *Test Administrators*.

8.1. CBA Test Platform

Standard 8.1 The international contractors will test and provide written quality assurances that both online and offline CBA solutions meet PISA 2025 test delivery specifications, including implementation of the national versions of cognitive and questionnaire instruments.

Participating entities must test the national test versions in the test delivery platform following testing plans to ensure the correct implementation of national adaptations and extensions, display of national languages, and proper functioning on computers typically found in schools in each participating entity. Testing results must be submitted to the international contractors so that any errors can be promptly resolved.

8.2. CBA Software Helpdesk Provision

Standard 8.2 Each participating entity should have a designated PISA helpdesk with contact information provided to each of its *Test Administrators* and *School Co-ordinators* or *School Associates*.

8.3. Helpdesk Staff Responsibilities

Standard 8.3 In countries that administer the computer-based version of PISA, the helpdesk staff must:

- be familiar with the PISA computer system requirements applications and training materials,
- be familiar with all national software standards and procedures; and
- attend the test administrator training sessions to become familiar with the computer-based assessments and appreciate the challenges faced by schools and *Test Administrators*.

8.4. Documentation Required for Quality Assurance of Testing of National Software Versions and Technical Support

- Detailed testing plans
- Review of testing results
- National Centre Quality Monitoring
- Field Trial and Main Survey Review Forms

9. Paper-based Assessment: Assembling, Printing, and Submission of Paper-based Materials

36. **Rationale:** Variations in assembly and print quality may affect data quality. When the quality of paper and print is very poor, the performance of students is influenced not only by their levels of literacy, but also by the degree to which test materials are legible. To rule out this potential source of error, and to increase the consistency and precision of the data collection, paper and print quality samples are solicited from National Centres participating in paper-based components in their first cycle of participation.

9.1. Preparation of trend items

Standard 9.1 As part of the 2025 quality control process, the contractors assume responsibility for preparing national versions of the paper-based *trend items* by extracting them from existing booklets in the PISA archives and formatting them for the 2025 cycle.

9.2. Preparation of new and updated materials

Standards 9.2 Those participating entities who are new to PISA in 2025, or who were missing units from previous cycles in which they had not participated, translate those materials following the standard PISA translation/reconciliation process described in Section 7 of this document and in more details in the National Project Manager Manual and in the Translation and Adaptation Guidelines.

All participating entities administering paper-based assessment translate new items and the common booklet parts, which include the cover page, general instructions, formula sheet for Mathematics, and the acknowledgements page.

9.3. Cover Page

Standard 9.3 The cover page of all national PISA paper-based instruments used for students and schools must contain:

- all titles and approved logos in a standard format provided in the source version.
- all information necessary for checking whether the data collection follows the assessment design, i.e. whether the mapping of the student on the one hand, and test booklets and questionnaires, on the other, have been correctly established

The features of the cover page are specified in the National Project Manager Manual, the Translation and Adaptation Guidelines, and in the Data Management Manual.

9.4. Layout and Pagination of all Paper-Based Test Instruments

Standard 9.4 The layout and pagination of all test paper-based material is the same as in the source versions, unless otherwise *agreed upon*.

9.5. Layout and Formatting of the Paper-Based Questionnaires

Standard 9.5 The layout and formatting of the paper-based questionnaire material is same as in the source versions, with the exception of changes made necessary by national adaptations.

9.6. Assembling of the Final Print-Ready File

Standards 9.6 Once the items and common booklet parts are finalised and agreed upon, the **Field Trial** and **Main Survey** booklets are assembled by the contractors and shared with countries for final review and signoff. Following that approval process, print-ready files are provided to National Centres.

9.7. Submission of Paper-Based Instruments for Final Optical Check

Standard 9.7 All participating entities administering paper-based assessment submit a printed copy of all **Field Trial** instruments (booklets and questionnaires) for approval of the printing quality for the **Main Survey**. The same printing standard must be used for both the **Field Trial** and the **Main Survey**.

9.8. Assembling of the Main Survey Instruments

Standard 9.8 Main Survey print-ready files of the paper-based instruments are provided to National Centres after the following process:

- the selection of the Main Survey items by the contractors based on the Field Trial analysis;
- assembly of the Main Survey paper-based instruments by the contractors; and
- final review and signoff by the National Centres.

9.9. Submission of Final Versions of Paper-based Instruments to International Contractors

Standard 9.9 A complete set of PISA paper-based instruments as administered and including any national options, is forwarded to the international contractors on or before the first day of testing. The submission must include the electronic (PDF and/or Word) versions of all instruments.

9.10. Documentation Required for Quality Assurance of Assembling and Printing Paper-Based Instruments

- Agreement that quality will be similar to Field Trial versions
- For new participating entities, materials submitted to the international contractors, as described in Standard 9.7 above
- Field Trial and Main Survey Review Forms
- Complete set of paper-based instruments submitted to contractors

10. Field operations – Test Administration, Test Administrator Training and Quality Monitoring

37. **Rationale:** To obtain valid results from the assessment, the data collected must be of high quality, i.e. the data must be collected in a consistent, reliable and valid fashion. This goal is implemented first and foremost by the *Test Administrators*, who are seconded

by the *PISA Quality Monitors*²³. The quality monitors provide supervision of all data -collection activities in the participating entity for the Main Survey. The standards in this section allow National Project Managers or their designees to become familiar with PISA materials and procedures and informs them of their responsibilities for overseeing the PISA testing. They facilitate consistency of training delivery to *Test Administrators*, and *PISA Quality Monitors*.

10.1. Trainer Test Administrator Training Sessions

Standard 10.1 Qualified contractor staff will conduct trainer training sessions with NPMs or designees on PISA materials and procedures to prepare them to train *PISA Test Administrators*.

10.2. Training Materials

Standard 10.2 NPMs or designees shall use the comprehensive training materials and approach developed by the contractors and provided on *PISA Connect* to train *PISA Test Administrators*.

10.3. Test Administrator Training

Standard 10.3 In-person and/or web-based test administrator trainings should be conducted by the NPMs or designees, unless a suitable alternative is *agreed upon*.

²³ *PISA Quality Monitor* (PQM) – a person nominated by the National Project Manager and employed by the international contractors to monitor test administration quality in an adjudicated entity

10.4. Test Administrator Criteria

Standard 10.4 The relationship between *Test Administrators* or *School Associates* and participating students must not compromise the credibility of the test session. In particular, the *Test Administrator* or *School Associates* should **not** be:

- a relative, or a personal acquaintance of any student in the assessment sessions he or she will administer for PISA;
- the reading, mathematics, or science instructor of any student in the assessment sessions he or she will administer for PISA;
- the English as a foreign language instructor or instructors of subjects taught in English for those taking the FLA optional domain.

Test Administrators or *School Associates* should preferably not be school staff.

10.5. Test Administration Sessions

Standard 10.5 All test sessions must follow international procedures as specified in the PISA school-level materials, particularly the procedures that relate to:

- test session timing
- maintaining test conditions
- responding to students' questions
- student tracking, and
- assigning assessment materials, if the test is paper based or login details if the test is computer-based.

All test sessions must be conducted using the *Test Administrator* script. Test Administrators are required to follow the script word-for word to ensure consistency of all test sessions across participating entities. Failure to do so could cause errors in data collection and make results less comparable.

10.6. Administration of National Option Instruments

Standard 10.6 Any national options that are not part of the core components of PISA must be administered after all the test and questionnaire instruments of the core component of PISA have been administered to students that are part of the international PISA sample, unless otherwise *agreed upon*.

10.7. Rewards

Standard 10.7 National Centres must not offer rewards or incentives that are related to student achievement in the PISA test to students, teachers, or schools.

This does not apply to incentives or rewards intended to improve participation, and that are unrelated to student achievement in the PISA test.

10.8. Monitoring of Test Administration

Standard 10.8 PISA **Main Survey** test administrations are monitored using site visits by trained independent *PISA Quality Monitors (PQM)*.

10.9. PQM Training

Standard 10.9 PISA Quality Monitors need to successfully complete self-training materials, attend webinars to review and enhance the self-training, and attend the test administrator training, unless otherwise *agreed upon*.

10.10. PQM Site Visits

Standard 10.10 Ten site visits to observe test administration sessions are conducted in each participating entity, and five site visits in each additional adjudicated region for the **Main Survey**.

10.11. Selection of Test Administration Visits

Standard 10.11 The National Centre provides the international contractors the assistance required to implement the site visits effectively. This includes nominating sufficient qualified individuals to ensure that the required number of schools is observed. It also includes timely communication of school contact information and test dates.

Test administration sessions that are the subject of a site visit are selected by the international contractors to be representative of a variety of schools in a participating entity.

10.12. Documentation Required for Quality Assurance of Field Operations

- Records of participation in trainer training sessions in standardised procedures by qualified contractor staff
- Review of Test Administrator Training Observation Forms
- Session Report Forms
- Field Trial and Main Survey Review Forms
- National Centre Quality Monitoring Report (only for Main Survey)
- Record of standard training of PQMs
- PISA Quality Monitors feedback and Data Collection Forms (only for Main Survey)
- Field Trial and Main Survey Review Forms

11. Response Coding

38. **Rationale:** All coding procedures for the core PISA test must be standardised, follow approved coding designs, and coders must complete training sessions to ensure the comparability of the data. For the FLA optional domain, coding for the speaking component will be performed centrally by a specialised institution using highly trained coders and separate quality control procedures.

11.1. Coder Recruitment

Standard 11.1 Coders are recruited following *agreed upon* procedures outlined in the *PISA operations manuals*.

11.2. International Coder Training Sessions

Standard 11.2 Representatives from each National Centre must attend the international PISA coder training session for all domains, for both the **Field Trial** and the **Main Survey**. The number of Coder Training session participants will depend on factors such as the expertise of National Centre staff, and resource availability.

11.3. Coder Training at National Centres

Standard 11.3 Coders are trained by the representatives from the National Centre who were trained at the international PISA coder training session following *agreed procedures* outlined in the *PISA operations manuals*.

11.4. Coding Guides

Standard 11.4 The coding scheme described in the Coding Guides is implemented according to instructions from the international contractors.

11.5. Coding Implementation

Standard 11.5 Both the single and multiple coding procedures must be implemented as specified in the *PISA operations manuals*. These procedures are implemented in the coding software that participating entities will be required to use. The coding design for PISA 2025 replicate the design used in previous cycles of PISA (see PISA 2018 Technical Report²⁴).

11.6. Documentation Required for Quality Assurance of Coding

- Indices of inter-coder agreement
- Field Trial and Main Survey Review Forms

12. Data Management

39. **Rationale:** The timely progression of the project, within the tight timelines given, depends on the quick and efficient submission of all collected data. To avoid potential errors when consolidating the national databases, any changes in format that were implemented subsequent to the general agreement must be announced. Consolidating and merging the national databases is a time-consuming and difficult task. To ensure the timely and efficient progress of the project, the international contractors need continuous access to national resources to help rule out uncertainties and resolve discrepancies.

12.1. Data Management Software Configuration and Testing prior to the Release

Standard 12.1 The international contractors must configure and test all national data management software versions prior to their release to ensure that they were configured correctly and have no technical problems.

²⁴ Chapter 13 of:

<https://www.oecd.org/content/dam/oecd/en/about/programmes/edu/pisa/publications/technical-report/pisa-2018-technical-report-files/full-report/PISA%202018%20Technical%20report%20full.zip>

12.2. Data Management Personnel at the National Centres

Standard 12.2 Each National Centre must nominate one *Data Manager* and as many *Data Administrators* as *agreed upon*. The number of Data Administrators will depend on factors such as the expertise of National Centre staff, and resource availability.

The *Data Manager* must be:

- able to communicate in English
- authorised to respond to international contractor data queries
- available for a three-month period immediately after the database is submitted unless otherwise agreed upon
- able to respond to international contractor queries within three working days, and
- able to resolve data discrepancies.

12.3. Data Manager Responsibilities

Standard 12.3 The *Data Manager* is responsible for handling of PISA data in the National Centre as outlined in the Data Management Manual for the duration of the handling of the data by the National Centre and the Consortium. In particular National Centres will ensure the *Data Manager* is available upon submission of the database.

12.4. Data Manager Training

Standard 12.4 The *Data Manager* from each National Centre must attend the international PISA data management training session for the **Field Trial**. Additional web-based training is provided for the **Main Survey** for the *Data Managers* that did not experience the **Field Trial**.

12.5. Data Management Software Modifications and Testing after Release

Standard 12.5 Once ACER Maple has been released, participating entities may need to further modify it according to *agreed upon structural adaptations*²⁵. Participating entities must thoroughly check their versions of ACER Maple as outlined in the Data Management Manual.

12.6. Data Administrator Training

Standard 12.6 *Data Administrators* are trained by *Data Managers* following agreed procedures outlined in the Data Management Manual.

12.7. Storing of Data at the National Centre

Standard 12.7 All PISA data are stored using the software provided by international contractors:

- Sampling data²⁶ are stored in ACER Maple
- Computer-based responses are stored in the TAO platform
- Paper-based responses are stored in ACER Marking System

All data must be stored secure in accordance with the standards outlined in Section 5 of this document.

12.8. Data Submission Prerequisite

Standard 12.8 Before data is submitted by National Centres it must be validated by the *Data Manager* as outlined in the Data Management Manual.

²⁵ **Structural adaptations to paper-based survey instruments** (including cover pages) include:

- deletion of items from the instruments,
- addition of items to the instruments, and
- changes in the format of the existing items.

Structural adaptations to Excel templates such as input list for sampling, tracking forms and templates to export lists of sampled candidates consist of any changes to the data section of an Excel template associated with a particular template. This includes any changes to:

- column names, and
- single cells in the heading of the data worksheet or anywhere in other worksheets, that are populated by ACER Maple.

²⁶ *Sampling data* is all the data processed by ACER Maple during within-institution sampling before the assessment and tracking data processed after assessment.

12.9. Data Submission Timeline

Standard 12.9 The timeline for submission of *complete set of PISA data*²⁷ to the international contractors is within eight weeks of the last day of testing for the **Field Trial** and within eight weeks of the last day of testing for the **Main Survey**, unless otherwise *agreed upon*.

12.10. Response Data Mode of Delivery

Standard 12.10 Response data include responses from all *instruments*, including the test data and questionnaires, and must be delivered by *participating entities* to the international contractors as described in the Data Management Manual. In particular:

- all paper-based responses are submitted via non-confidential database exported from ACER Marking System, and
- all computer-based responses are submitted via the computer-based delivery platform. Computer-based response data also includes log-file information such as, but not limited to, time stamps.

12.11. Response Data Conditions

Standard 12.11 Unless *agreed upon*, all response data are submitted without recoding any of the original response variables.

All *instruments* for all *additional adjudicated entities* will contain the same variables as the *primary adjudicated entity* of the participating entity.

12.12. Accompanying documentation

Standard 12.12 Each participating entity submits its data with full documentation as specified in the *PISA operations manuals*.

12.13. Documentation Required for Quality Assurance of Data Management

- International contractors' records of communications, forms, or documents.

13. Archiving of Materials

40. **Rationale:** The international contractors will maintain an electronic archive. This will provide an overview of all materials used and ensure continuity of materials

²⁷*Complete set of PISA data* includes all sampling data and all response data, which contain all responses of participants to all test and questionnaires data.

available in participating countries across PISA survey cycles, therefore building upon the knowledge gained nationally in the course of the PISA cycles. This will also ensure that the international contractors have the relevant materials available during data cleaning, when they are first required.

13.1. Scope of Archiving

Standard 13.1 Archiving applies to all materials from the **Field Trial** and **Main Survey**, including student, school, parent and teacher materials, as applicable.

13.2. Timeline of Archiving of Materials by National Centres

Standard 13.2 Unless otherwise requested, National Centres will retain all **Field Trial** materials until the beginning of the **Main Survey**, and all **Main Survey** materials until the end of the calendar year two years after the year when the **Main Survey** is conducted (i.e. when the last international reports containing the results of the Main Survey will have been published).

Should national legislation or other circumstances require that the **Field Trial** or **Main Survey** materials be deleted/erased before this timeline countries must nevertheless retain these records, at a minimum, until the publication of the PISA dataset (and publication of the related international reports). All materials must be kept secure as outlined in Section 5 of this document.

13.3. Materials to be Archived at the National Centres

Standard 13.3 Materials to be archived for the period outlined in the Standard 13.2 include:

- all respondents' paper-based test booklets and questionnaires (participating entities that administered any paper-based instruments)
- all respondents' result files from the assessment delivery platform and all associated data (participating entities that administered CBA)²⁸
- all sampling forms²⁹
- all candidate lists³⁰
- all tracking forms³¹, and
- all data submitted to the international contractors.

After completion of a survey, the National Centre will transfer final versions of all national materials to the international contractors who will collate the national archives from all participants and transfer them to OECD after completion of the **Main Survey**.

13.4. Materials to be Submitted from the National Centres to the International Contractors

Standard 13.4 At the time of data submission, the National Project Manager must submit one copy of each of the following adapted and translated Main Survey materials to the international contractors, via *PISA Connect*:

- electronic versions (Word and/or PDF) of all Test Instruments administered as paper-based, including *international* and *national options*
- electronic versions (Word and/or PDF) of all Questionnaires administered as paper-based, including *international* and *national options*
- electronic versions of the school-level materials, and
- electronic versions of the Coding Guides.

²⁸ It is recommended to retain all paper-based booklets and questionnaires for all respondents until certified data has been released to the National Centres.

²⁹ *Sampling forms* refers to the forms outlined in the School Sampling Preparation Manual, *agreed upon* and uploaded on the PISA Portal.

³⁰ *Candidate lists* refers to the student list (and teacher list if applicable) used for *within-institution* sampling.

³¹ *Tracking forms* refers to the Student Tracking Form (and Teacher Tracking Form if applicable) completed in each institution.

13.5. Materials Archiving by International Contractors and by the OECD

Standard 13.5 The international contractors will maintain a permanent electronic archive of all assessment materials, school-level materials and coding guides, including all national versions. For documents that are finalised by countries, they are required to upload the latest version to *PISA Connect*.

13.6. Documentation Required for Quality Assurance of Archiving

- Materials listed in Standards 13.3 and 13.4

14. Final Data and Reports

14.1. National Database

Standard 14.1 Each participating entity will receive its own national micro-level PISA database (the “national database”), in electronic form in agreed upon a pre-specified timeline that varies based on their data submission. The national database will contain the complete set of responses from the students, school principals and surveyed participants (parents, teachers) in that country/economy.

14.2. Review of National Databases by Participating Entities

Standard 14.2 The OECD Secretariat will not release national data to other participating entities until participating entities have been given an opportunity to review and comment on their own national data and until the release of such data has been approved by the national authorities.

14.3. Withdrawing of National Data from the International Database

Standard 14.3 A deadline and procedures for withdrawing national data from the international micro-level PISA database (the “international database”) will be decided upon by the PISA Governing Board. Participating entities can withdraw data only prior to obtaining access to data from other participating entities. Withdrawn data will not be made available to other participating entities.

The PISA Governing Board will discuss with participating entities whose data manifests technical anomalies as to whether the data concerned can be included in the international database. The decision of the PISA Governing Board will be final. Participating entities may, however, continue to use data that are excluded from the international database at the national level.

14.4. International Database and OECD Reports and Publications

Standard 14.4 The international contractors will compile the international database, which will comprise the complete set of national PISA databases, except those data elements that have been withdrawn by participating entities or by the PISA Governing Board at the previous stage.

The international database will form the basis for the initial OECD publication of the survey results (the “initial international OECD publication”) and other OECD indicator reports and publications.

The international database will remain confidential until the date on which the initial international OECD publication is released. After release of the initial international OECD publication, the international database will be made publicly available on a cost-free basis, through the OECD Secretariat. The database may not be offered for sale.

National data from all participating entities represented in the international database will be made available to all participating entities from the date on which the initial international OECD publication is released.

The international database will form the basis for OECD indicator reports and publications.

The international contractors will have no ownership of instruments or data nor any rights of publication and will be subject to the confidentiality terms set in this agreement.

The OECD establishes rules to ensure adherence to the above procedure and to the continued confidentiality of the PISA data and materials until the agreed release dates. These include confidentiality agreements with all individuals that have access to the PISA material prior to its release

14.5. Publication of National Results

Standard 14.5 Each participating entity can publish its own data after a date that is established by the PISA Governing Board for the publication of the initial international OECD publication.

14.6. Copyright

Standard 14.6 As guardian of the process and producer of the international database, the OECD will hold copyright in the database and in all original material used to develop, or be included in, the PISA **Field Trial** and PISA **Main Survey** (among them the assessment materials, school-level materials, and coding guides) in any language and format.

Glossary

ACER – Australian Council for Educational Research, the Core 1 and Core 4 contractor for PISA 2025 (<https://www.acer.org/au/>).

ACER Maple is the within-school sampling and data management software.

Adaptation - an intentional addition to, deletion from or deviation from the international source version, made to conform to local usage or context; to maintain equivalence where a straightforward translation cannot ensure equivalence; or to collect country-specific data in addition to data for the international dataset

Adjudicated Entity – a country, geographic region, or similarly defined population, for which the international contractors fully implement quality assurance and quality control mechanisms and endorses, or otherwise, the publication of separate PISA results. A participating entity may manage more than one adjudicated entity.

Agreed timelines – timelines that are specified in the PISA operations manuals, or variations that are mutually agreed upon between the National Project Manager and the international contractors.

Agreed upon – variations that are mutually agreed upon between the National Project Manager and the international contractors

Anonymisation - personal data is rendered anonymous, by irreversibly removing the link between each respondent's personal identifier (e.g. respondent name) and the data in the PISA dataset. This is achieved by deleting and erasing all additional information sources containing the link, so respondents in the PISA dataset cannot be personally identified. This applies to students, parents or teachers, if these options are administered, and anonymisation can be pursued after the archiving period in Standard 20.3.

cApStAn – organisation that is responsible for linguistic quality control in PISA (<https://www.capstan.be/>)

Field Trial is the first period of data collection. The purpose of the Field Trial is to:

- collect data to ensure that the instruments developed for the Main Survey contain test and questionnaire items that are sound in all participating entities and that they are properly translated;
- test the operational procedures.

HallStat – PISA translation referee.

International options – optional additional international instruments or procedures sponsored by the OECD and fully supported by the international contractors.

International Standard Classification of Education (ISCED) is maintained by OECD, European Union, and UNESCO Institute for Statistics. PISA uses ISCED 2011 classification. See OECD/Eurostat/UIS (2015_[1]).

- ISCED level 1 is referred to different types of primary education
- ISCED level 2 is referred to different types of lower secondary education
- ISCED level 3 is referred to different types of upper secondary education

Item - a question, a statement or a task in tests and questionnaires that requires a response from participants.

National Centre quality monitoring – the procedures by which the international contractors monitor the quality of all aspects of the implementation of the survey by a National Centre.

National option – a national option occurs if:

- a) a National Centre administers any additional instrumentation, for example a test or questionnaire, to schools or students that are part of the PISA international sample. Note that in the case of adding items to the questionnaires, an addition of five or more items to either the school questionnaire or the student questionnaire is regarded as a national option.

OR

- b) a National Centre administers any PISA international instrumentation to any students or schools that are not part of an international PISA sample (age-based or grade based) and therefore will not be included in the respective PISA international database.

OR

- c) a National Centre administers any PISA international option only in some, not all, jurisdictions. The participating entity will in this case sign up for the international option with the OECD, as if it was administered in the entire jurisdiction, and the additional work involved with administering the international option to part of the jurisdiction only is considered a national option.

Participating entity – an administration centre, commonly called a National Centre, that is managed by a person or persons, usually the National Project Manager, who is/are responsible for administering PISA in one or more adjudicated entities. The National Project Manager(s) must be authorised to communicate with the international contractor on all operational matters relating to the adjudicated entities for which the National Project Manager is responsible.

PISA National Project Manager (NPM) – The NPM is responsible for overseeing all national tasks related to the development and implementation of PISA throughout the entire cycle. The NPM is responsible for ensuring that tasks are carried out on schedule and in accordance with the specified international standards.

PISA Operations Manuals – all manuals provided by the international contractors. The preparation of the PISA operations manuals will be carried out by the international contractors and will describe procedures developed by the international contractors. The manuals will be prepared following consultation with participating entities, the OECD Secretariat, the Technical Advisory Group and other stakeholders.

PISA Connect – PISA Connect is the central website for PISA 2025 and is maintained by the Core 1 Contractor. It is one of the main channels for communication between the PISA Contractors and participating National Centres.

PISA Quality Monitor (PQM) – a person nominated by the National Project Manager and employed by the international contractors to monitor test administration quality in an adjudicated entity.

PISA Target Population – students aged between 15 years and 3 (completed) months and 16 years and 2 (completed) months at the beginning of the testing period, attending educational institutions located within the adjudicated entity, and in grade 7 or higher. The age range of the population may vary up to one month, either older or younger, but the age range must remain 12 months in length. That is, the population can be as young as between 15 years and 2 (completed) months and 16 years and 1 (completed) month at the beginning of the testing period; or as old as between 15 years and 4 (completed) months and 16 years and 3 (completed) months at the beginning of the testing period.

- **PISA Desired Target Population** – the PISA Target Population defined for a specific adjudicated entity. It provides the most exhaustive coverage of PISA Target population in the participating entity as is feasible.
- **PISA Defined Target Population** – PISA Target population in the schools that are listed on the school sampling frame. That is, the PISA Desired Target Population minus school-level exclusions.

Pseudonymisation – personal data where the personal identifier (e.g. respondent’s name) is replaced by an artificial identifier (pseudonym). In PISA, the respondent’s name is not included in the data collected on the assessment day but is replaced with an ID number. Therefore the data is categorised as pseudonymised, as long as the additional information linking the respondent name and the PISA respondent ID is stored in a different file or location.

Privacy Law – As defined in the Contractual Clauses, the “Decision of the Secretary-General on the Protection of Individuals with regard to the Processing of their Personal Data” Annex XII of the Staff Regulations, Rules and Instructions applicable to Officials of the Organisation (hereinafter “the OECD Data Protection Rules”, available at <https://www.oecd.org/content/dam/oecd/en/about/data-protection/Decision-of-the-SG-on-Personal-Data-Protection.pdf>) and specific privacy legislation applicable to Participants and/or the Contractor, including but not limited to the General Data Protection Regulation.

QEG-Questionnaire Expert Group - A group of experts who contribute to the development of the questionnaires. The QEG assists the PISA Contractors in linking PISA’s policy objectives with substantive and technical expertise.

Quality - PISA has developed three inter-related aspects of quality: quality control, quality monitoring and quality assurance.

- **Quality control measures** are used to ensure that data and procedures conform to the specifications in the Technical Standards.
- **Quality monitoring procedures** are used to evaluate whether Technical Standards have been achieved as planned. One quality monitoring procedure is PQM observation of test session activities during the Main Survey.
- **Quality assurance is achieved during the data adjudication process, whereby issues that may compromise the quality of the data are reviewed and corrective actions are taken, if appropriate.**

Questionnaire Adaptation Spreadsheet (QAS) - The QAS is an Excel spreadsheet where all questionnaire items are listed. The QAS is used as part of the negotiations and documentation of national adaptations.

School Associate (SA) – a person at a school who acts as a liaison between the school and the National Centre to prepare for the assessment and who administers the assessment to students on the day of the assessment.

School Co-ordinator (SC) – a person at a school who acts as a liaison between the school and the National Centre to prepare for the assessment in the school.

School-level exclusions – contractors’ approved exclusion of schools from the sampling frame because:

- of geographical inaccessibility (but not part of a region that is omitted from the PISA Desired Target Population),
- administration of the PISA assessment within the school would not be feasible,
- all students in the school would be within-school exclusions, or
- of other reasons as agreed upon.

School-level materials – the key materials include:

- School Co-ordinator Manual and Test Administrator Manual (or School Associate Manual)
- Test administration scripts
- Key forms – Student List, Student Tracking Form, Session Attendance Form, and Session Report Form

SMEG-The Subject Matter Expert Groups are responsible for linking the policy objectives identified by the PGB with expertise in the relevant area, as well as establishing consensus on content and technical issues raised by participating entities within the larger framework, and the objectives of the overall implementation strategy.

Source versions of the assessment instruments are provided in English (and, for some documents, in French) by the international contractors according to contractual specifications.

Structural adaptations to paper-based survey instruments (including cover pages) include:

- deletion of items from the instruments,
- addition of items to the instruments, and
- changes in the format of the existing items.

Structural adaptations to Excel templates such as input list for sampling, tracking forms and templates to export lists of sampled candidates consist of any changes to the data section of an Excel template associated with a particular template. This includes any changes to:

- column names, and
- single cells in the heading of the data worksheet or anywhere in other worksheets, that are populated by ACER Maple.

TAG- the Technical Advisory Group advises on the technical features of the assessment, such as scaling and sampling methodologies, and has a role in ensuring the technical quality of the data

TAO – Test Assisté par Ordinateur (Open Assessment Technologies) PISA test platform owner and provider.

Target cluster size – the number of students that are to be sampled from schools where not all students are to be included in the sample.

Test Administrator – a person who is trained by the National Centre to administer the PISA test in schools. This person may be a Test Administrator or a School Associate (a School Co-ordinator who also has the role of a Test Administrator).

Testing period – the period of time during which data is collected in an adjudicated entity.

Translation plan – documentation of all the processes that are intended to be used for all activities related to translation and languages.

Within-school exclusions – potential exclusion of students from assessment because of one of the following:

- They are functionally disabled in such a way that they cannot take the PISA test. Functionally disabled students are those with a moderate to severe permanent physical disability.
- They have a cognitive, behavioural or emotional disability confirmed by qualified staff, meaning they cannot take the PISA test. These are students who are cognitively, behaviourally, or emotionally unable to follow even the general instructions of the assessment.
- They have insufficient assessment language experience to take the core PISA test. Students who have insufficient assessment language experience are those who meet all the following three criteria:
 - they are not native speakers of the assessment language,
 - they have limited proficiency in the assessment language, and
 - they have received less than one year of instruction in the assessment language.
- There are no materials available in the language in which the student is taught.
- They cannot be assessed for some other reason as agreed upon.

References

OECD/Eurostat/UNESCO Institute for Statistics (2015), *ISCED 2011 Operational Manual: Guidelines for Classifying National Education Programmes and Related Qualifications*, OECD Publishing, Paris, [1]
<https://doi.org/10.1787/9789264228368-en>.