

**DIRECTORATE FOR EDUCATION AND SKILLS
PROGRAMME FOR INTERNATIONAL STUDENT ASSESSMENT****Governing Board****FIRST DRAFT PISA 2029 TECHNICAL STANDARDS****Technical session of the 61st meeting of the PISA Governing Board**

7 April 2026
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This document is intended for the PGB's technical session on 7 April 2026.

The document presents a first draft proposal of the Technical Standards for PISA 2029. It is informed by the sampling innovations and considerations presented in the accompanying document [EDU/PISA/GB(2026)2]. Certain elements of the survey design regarding accessibility are under development and will be incorporated in the final version.

The document will be revised after the 61st PGB meeting based on the PGB's feedback and a review by PISA's Technical Advisory Group. A final draft for the PGB's approval will then be presented at the 62nd PGB meeting in October 2026.

Participants of the technical session of the 61st PGB meeting are invited to:

- **DISCUSS** and **PROVIDE FEEDBACK** to the first draft Technical Standards for PISA 2029 at the optional technical session of the 61st PGB meeting on 7 April 2026.

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Table of contents

First Draft PISA 2029 Technical Standards	5
Introduction	5
Purpose and scope	5
Intended audience	5
Quality dimensions and objectives	5
Quality assurance and accountability	6
Data adjudication and inclusion	6
Adjudication process	7
Status of the Technical Standards.....	7
1. Management Structures.....	7
1.1. PISA Governing Board (PGB)	7
1.2. The OECD Secretariat	7
1.3. Advisory Groups	8
1.4. International Contractors	8
1.5. National Centres	8
1.6. Documentation Required for Quality Assurance of Management Structures.....	9
2. Communication protocols.....	9
2.1. Communication with the PISA Governing Board	9
2.2. Communication with Subject Matter Expert Groups and the Questionnaire Expert Group	10
2.3. Communication with the Technical Advisory Group	10
2.4. Communication with the National Centres.....	10
2.5. National Centres' Communication with the International Contractors	10
2.6. National Centres' Communication with Participating Schools	11
2.7. Communication with the General Public.....	11
3. Participation and Timelines.....	11
3.1. Frequency and Length of the International Meetings and Training Sessions	12
3.2. Meeting and Training Session Attendance	12
3.3. Requirements for Meeting and Training Session Attendees	13
3.4. Feedback from National Centres to the International Contractors	13
3.5. Notification of Optional Modules.....	13
3.6. Notification of National Options	13
3.7. Implementation of National Options and Optional Modules.....	13
3.8. Submission of Materials	14
3.9. Translation Plan.....	14
3.10. Field Trial Participation.....	14
3.11. Documentation Required for Quality Assurance of Participation and Timeliness	14
4. Security of Materials and Data Protection	14
4.1. PISA Materials Designated as Secure	15
4.2. Processing of Personal Data by National Centres and International Contractors	15
4.3. Documentation Required for Quality Assurance of Security of Materials and Data Protection	15
5. Target population	15
5.1. Core PISA Desired Target Student Population.....	16
5.2. PISA Defined Target Population	16
5.3. Desired and Defined Target Student Population for the Financial Literacy Assessment	17
5.4. Optional PISA Desired Target Teacher Population.....	17
5.5. Testing Period.....	17
5.6. Documentation Required for Quality Assurance of Population	18

6. Sampling.....	18
6.1. School Sampling for the Main Survey.....	18
6.2. School Sampling Principles for the Field Trial	18
6.3. List of Sampled Schools	19
6.4. Student Lists for Within-School Sampling.....	19
6.5. Use of IEA Online Survey Expert by National Centres	19
6.6. Responsibility of National Centres and School Coordinators in the Secure use of IEA Online Survey Expert	19
6.7. Verification of school sample in IEA OSE before test administration and potential modification to Sampling and Tracking Forms / Lists.....	20
6.8. Student Sampling Principle and Execution	20
6.9. Alternative Execution of Sampling Procedures.....	21
6.10. Alternative Methods of Drawing Samples	21
6.11. Eligibility for PISA.....	21
6.12. Overall Field Trial Sample Size of Assessed Students	21
6.13. Overall Main Survey Sample Size of Assessed Students	22
6.14. School Sample Size	22
6.15. School stratification.....	22
6.16. Minimum Student Target Cluster Size	23
6.17. School Response Rate	23
6.18. School-level Non-Response Bias Analysis	23
6.19. Student Response Rate	24
6.20. Student-level Non-Response Bias Analysis	24
6.21. Questionnaire Data Treatment in OECD Reports.....	24
6.22. Documentation Required for Quality Assurance of Sampling	24
7. Assessment	25
7.1. Core PISA 2029 Test.....	25
7.2. Core PISA 2029 Questionnaires.....	25
7.3. Optional PISA 2029 Financial Literacy Assessment.....	25
7.4. Optional PISA 2029 Questionnaires.....	26
7.5. Assessment Development.....	26
7.6. Modes of Assessment.....	26
7.7. Test Designs	27
7.8. Language of Assessment.....	27
7.9. Documentation Required for Quality Assurance of Assessment Standards	28
8. Translation and Adaptation of Tests, Questionnaires and School-Level Materials	28
8.1. Test Items Used in Previous Cycles	28
8.2. Questionnaire Items Used in Previous Cycles.....	28
8.3. Adaptations to the Source Versions of Tests and Questionnaires	29
8.4. Adaptations to the School-level Materials.....	29
8.5. Translation of Assessment Materials.....	29
8.6. Human translation requirement of Tests and Questionnaires	29
8.7. Translation of School-level Materials	30
8.8. Verification of translated materials	30
8.9. Documentation Required for Quality Assurance of Translation and Adaptation	30
9. Computer-based Assessment: Testing of National Software Versions and Technical Support	31
9.1. CBA Test Platform.....	31
9.2. CBA Software Helpdesk Provision	31
9.3. Helpdesk Staff Responsibilities.....	32
9.4. Documentation Required for Quality Assurance of Testing of National Software Versions and Technical Support.....	32
10. Field operations – Test Administration, Test Administrator Training and Quality Monitoring.....	32

10.1. Trainer Test Administrator Training Sessions	32
10.2. Training Materials	33
10.3. Test Administrator Training	33
10.4. Test Administrator Criteria.....	33
10.5. Test Administration Sessions	33
10.6. Administration of National Option Instruments	34
10.7. Information and Training Prior to the Test Session.....	34
10.8. Rewards.....	34
10.9. Monitoring of Test Administration.....	34
10.10. PISA Quality Monitoring Training.....	35
10.11. PISA Quality Monitoring Site Visits	35
10.12. Selection of Test Administration Visits.....	35
10.13. Documentation Required for Quality Assurance of Field Operations	35
11. Response Coding	36
11.1. Coder Recruitment.....	36
11.2. International Coder Training Sessions.....	36
11.3. Coder Training at National Centres	36
11.4. Coding Guides.....	36
11.5. Coding Implementation	36
11.6. Documentation Required for Quality Assurance of Coding	36
12. Data Management	37
12.1. Data Manager and Data Administration Responsibilities at National Centres	37
12.2. Data Manager Training.....	37
12.3. Data Administrator Training	37
12.4. Storing of Data at the National Centre	37
12.5. Data Submission Prerequisite	38
12.6. Data Submission Timeline	38
12.7. Response Data Mode of Delivery.....	38
12.8. Response Data Conditions.....	39
12.9. Accompanying documentation	39
12.10. Documentation Required for Quality Assurance of Data Management	39
13. Archiving of Materials	39
13.1. Scope of Archiving.....	39
13.2. National Materials to be Archived at the National Centres	40
13.3. National Materials to be Submitted by National Centres to the International Contractors for Archiving.....	40
13.4. National Materials to be Archived by the International Contractors and the OECD.....	40
13.5. Documentation Required for Quality Assurance of Archiving	41
14. Databases for Reporting	41
14.1. Reference versions of PISA Databases.....	41
14.2. Withdrawing of National Data from the International Database	41
14.3. Publication of National Results	41
14.4. Copyright.....	41
Glossary.....	42
References	47

First Draft PISA 2029 Technical Standards

Introduction

Purpose and scope

1. The PISA Technical Standards set out the principles that govern the implementation of the OECD Programme for International Student Assessment (PISA). They ensure consistency across participating entities and form a core component of PISA's quality assurance processes. The purpose of PISA is to generate an international dataset of a quality to support valid cross-national inferences. Adherence to the standards outlined in this document is essential to achieving this objective.
2. The standards in this document apply to data from *adjudicated entities*¹ including both participating entities and additional adjudicated entities managed by participating entities. The PISA Governing Board will approve the list of adjudicated entities included in each PISA cycle. The standards define expected levels of attainment, while timelines and feedback schedules of the *adjudicated entities* and the international contractors are defined in the PISA Operations Manuals² and in the Workflows in *PISA Connect*.
3. This document provides key definitions as footnotes to support comprehension and facilitate smooth reading. The glossary is also provided at the end of the document.
4. This draft document is a revision of the Technical Standards for PISA 2025. The *Reader's Guide to the draft PISA 2029 Technical Standards* [[EDU/PISA/GB\(2026\)2](https://www.oecd.org/edu/pisa/2026/2)] describes the changes for the PISA 2029 Technical Standards.

Intended audience

5. This document serves as a reference for national centres responsible for implementing PISA within participating entities, as well for the international contractors commissioned by OECD to support the central implementation of the tenth cycle of PISA³.

Quality dimensions and objectives

6. This document sets out the technical standards for PISA 2029. Four key dimensions underpin the data quality in PISA: consistency, precision, generalisability, and timeliness. The standards identify how these quality objectives are to be achieved and support national centres and international contractors to meeting PISA 2029 timelines.

¹ *Adjudicated entity* – a country, geographic region, or similarly defined population, for which the international contractors fully implement quality assurance and quality control mechanisms and endorse, or otherwise, the publication of separate PISA results. A PISA participant may manage more than one adjudicated entity.

² *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 (TAG) and other stakeholders.

³ See more about managing structures of PISA in Section 1.

7. *Consistency* refers to equivalent data collection across all participating entities (countries/economies). Data should be collected using the same assessment materials, translated with the highest possible degree of *linguistic equivalence*⁴ and/or adapted as appropriate. Comparable samples of the student population in each participating should be assessed under test conditions that are as similar as possible. When data collection is consistent and response rates sufficiently high, differences in test results across participating entities are expected to reflect actual differences in student performance rather than methodological or procedural factors unrelated to performance.

8. *Precision*: all processes used in PISA 2029 should minimise the risk of undesired variation or error. Both systematic and random errors must be minimised as much as possible. Greater precision enhances data quality, supports more powerful statistical analyses, and leads to more reliable and trustworthy results.

9. *Generalisability*: PISA is based on a sample of students rather than complete populations. It is essential that samples accurately represent the target population. In addition, test and questionnaire materials must be developed in a way that will ensure findings are not limited to the specific setting in which the data are collected, but are valid across a wide range of contexts and applicable to the target population as a whole. Together with consistency, generalisability enables valid cross-participating entity comparisons.

10. *Timeliness*: PISA is a large-scale and complex programme operating under tight timelines and budget constraints. Given the large number of participating entities, it is not feasible to develop and later harmonise local solutions. Therefore, the standards specify a clear and common pathway for data collection, coding and data submission.

Quality assurance and accountability

11. This document establishes a shared framework of mutual accountability between participating entities and the international contractors. It defines each standard and describes how compliance is assured. Quality assurance refers to the process through which PISA 2029 activities are monitored and guided to ensure that the programme meets its intended objectives.

Data adjudication and inclusion

12. Where standards have been fully met and data quality of the final databases is judged as appropriate, the PISA Adjudication Group formed by the Technical Advisory Group (TAG) and the Sampling Referee will recommend to the OECD Secretariat that the data be included in the PISA 2029 database. Where standards have not been fully met or data quality raises concerns, the adjudication process will assess the extent to which data quality or international comparability may have been affected, and whether additional analyses or evidence are necessary. The outcome of this process will determine whether the data are recommended for inclusion in the PISA 2029 dataset.

⁴ *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".

Adjudication process

13. During adjudication, the OECD Secretariat and the PISA Adjudication Group evaluate data from each participating entity against all standards collectively. This process takes into account circumstances beyond the control of national centres, such as national strikes or emergencies. Where agreement cannot be reached between National Project Managers and the OECD, the PISA Governing Board will take the final decision on the inclusion of national data in the international database.

Status of the Technical Standards

14. The PISA 2029 Technical Standards represent benchmarks of best practice. They inform PISA 2029 participating entities and international contractors of expectations and will be endorsed by the PISA Governing Board. The international contractors will support and monitor implementation. When the international contractors identify issues, they will contact the relevant national centre promptly and provide support to them where possible.

1. Management Structures

15. **Rationale:** PISA management structures are established to ensure the effective and smooth conduct of all PISA operations. They set benchmarks for best practice and ensure the creation and analysis of an international dataset of a high quality that allows for valid cross-national inferences.

1.1. PISA Governing Board (PGB)

Standard 1.1 Participating entities 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.

1.2. The OECD Secretariat

Standard 1.2 The OECD Secretariat is responsible for PISA's overall management, serving as the Secretariat of the PGB and as the interface between the PGB and the international contractors. It monitors the project implementation and facilitates consensus among participating entities on policy issues through the PGB. In collaboration with participating entities, the OECD Secretariat produces indicators and analyses and prepares the international reports.

1.3. Advisory Groups

Standard 1.3 Various expert groups are established to provide substantive and technical advice on specific aspects of PISA.

- **Technical Advisory Group (TAG):** Provides advice on the technical features of the assessment, including scaling and sampling methodologies, and contributes to ensuring the technical quality and integrity of the data.
- **Subject Matter Expert Groups (SMEGs) and Questionnaire Expert Group (QEG):** Responsible for linking the policy objectives identified by the PGB with expertise in the relevant area. These groups facilitate consensus on content and technical issues raised by participating entities within the broader framework and objectives of the overall implementation strategy as well as providing subject-matter expertise to guide instrument development and review.

1.4. International Contractors

Standard 1.4 The international contractors for PISA 2029 are:

- Core A – Australian Council *for* Educational Research (ACER), in cooperation with cApStAn⁵ and HallStat⁶, is the contractor for design, development and implementation and will play a key role in PISA 2029 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 B – ACER is the contractor for the instrument development and implementation of the innovative domain, Media and Artificial Intelligence Literacy (MAIL).
- Core C – International Association for the Evaluation of Educational Achievement (IEA) is the international contractor responsible for coordinating the implementation of all sampling-related activities in PISA 2029.

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

1.5. National Centres

Standard 1.5 Each participating entity should establish a national centre⁷ and register all national centre team members to the *PISA Connect*⁸.

⁵ cApStAn is responsible for linguistic quality control.

⁶ HallStat provides expert judgement on translation quality.

1.6. 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 contractors⁹.
- Mediation and monitoring of the national centres' activities specified in this document by the international contractors.

2. Communication protocols

16. **Rationale:** Given the project's tight schedule, delays in communication between the national centres and the international contractors should be minimised. Therefore, national centres require continuous access to the various resources provided by the contractors. The Workflow section of PISA Connect specifies response timelines and feedback schedules for the national centres and the international contractors.

2.1. Communication with the PISA Governing Board

Standard 2.1 The international contractors report to the PGB through the OECD Secretariat and implement the project on the PGB's behalf under the Secretariat's direction.

The international contractors do not have a direct relationship or direct communication with the PGB, except where they are explicitly invited by the OECD Secretariat or the PGB to do so.

NPMs are kept informed of relevant developments in the PGB through their national PGB representative. If NPMs wish to access PGB documents or to have matters officially addressed at the PGB meeting on behalf of their participating entity, they must be raised with their national PGB representative, and not the international contractors.

⁷ The details about national centres and their functions are provided in the National Project Manager (NPM) Manual.

⁸ PISA Connect is the project website for PISA 2029 and is maintained by the Core A Contractor. It is the main channel for communication between the international contractors and participating national centres.

⁹ The OECD will also adjudicate any issues resulting from non-compliance with the technical standards that cannot be resolved between participating entities and the international contractors.

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

Standard 2.2 The international contractors are responsible for convening the Subject Matter Expert Groups and the Questionnaire Expert Group. This includes providing information to expert group members and planning the expert group meetings. Information from national centres that is forwarded to expert groups includes national item reviews and responses collected through the National Centre Feedback Surveys. Where appropriate, the international contractors also forward ad hoc advice and comments received from national centres.

2.3. Communication with the Technical Advisory Group

Standard 2.3 The OECD Secretariat is responsible for all aspects related to the Technical Advisory Group and its meetings.

2.4. Communication with the National Centres

Standard 2.4 The international contractors ensure that suitably qualified staff are available to respond, in English, to requests by the national centres during all stages of the project. The qualified staff must:

- be authorised to respond to national centre queries
- acknowledge receipt of all national centre queries within one working day
- respond to all queries, including coder queries, from national centres within three working days, or, where a response cannot be provided within this timeframe, provide an estimated timeframe for resolution.

2.5. National Centres' Communication with the International Contractors

Standard 2.5 The National centre must ensure that suitably qualified staff are available to respond to requests from the international contractors during all stages of the project. The qualified staff must:

- be authorised to respond to queries
- be able to communicate in English
- acknowledge receipt of queries within one working day
- respond to queries from the international contractors within three working days, or, where a response cannot be provided within this timeframe, provide an estimated timeframe for response.

2.6. National Centres' Communication with Participating Schools

Standard 2.6 High levels of student and school participation are essential to the success of PISA. National centres are strongly encouraged to prepare communication materials for participating schools and students to raise awareness of PISA, explain what participation involves, encourage engagement in the assessment. These materials may include general information about the assessment and what students and schools can expect on the test day. To assist with this, the OECD will provide a set of released PISA test items for this purpose. The inclusion of released test items in informational materials may help familiarise students with the format of the assessment, reduce potential test anxiety, and allow them to focus on the subject matter during the test.

No PISA test items can be disclosed to participating institutions or to students prior to administration. Only the released test items provided by the OECD may be disclosed.

2.7. Communication with the General Public

Standard 2.7 *PISA Connect*, the PISA 2029 project website, maintained by the Core A contractor, ACER, is restricted to national centre use only due to the confidential nature of its materials. Public materials are available through the OECD PISA website at <http://www.oecd.org/pisa>. International contractors do not engage directly with the general public, except with the express permission of the OECD Secretariat. All public-facing information is communicated through the OECD or through national centres.

While national centres are expected to actively engage with the general public, particularly with 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 are strictly respected. National centres develop appropriate mechanisms to promote participation, effective implementation, and support the dissemination of results amongst all relevant national stakeholders.

3. Participation and Timelines

17. **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 at these meetings. Training focuses on data management, sampling, translation/adaptation, assessment delivery platform, and cognitive and occupation coding. The in-person meetings also allow for individual consultation and communication with the international contractors, which is often very helpful.

18. 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 options*¹⁰ and *international optional modules*¹¹ in which each national centre is going to participate. For the same reason, the international contractors will need to receive all relevant materials on time to enable the preparation and implementation of these options.

19. 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 international contractors to make detailed analyses of the *items* so that only suitable ones are included in the Main Survey.

3.1. Frequency and Length of the International Meetings and Training Sessions

Standard 3.1 Three National Project Manager meetings are planned for the PISA 2029 cycle. These meetings will be held in person and will typically range from 3 to 5 days in duration.

A coder training meeting for Reading will be conducted in person for the Field Trial, lasting 3 to 5 days, and online for the Main Survey.

Coder training meetings for all domains, including the innovative domain, MAIL, will be delivered online for the Main Survey.

All other training sessions will either be incorporated into National Project Manager meetings or delivered online.

3.2. Meeting and Training Session Attendance

Standard 3.2 Representatives from each national centre must attend all PISA international meetings, including National Project Manager meetings, coder training

¹⁰ 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 optional module only in some, not all, jurisdictions. The participating entity will in this case sign up for the optional module with the OECD, as if it was administered in the entire jurisdiction, and the additional work involved with administering the optional module to part of the jurisdiction only is considered a national option.
- d) a national Centre specifies additional requirements for sampling, reflecting national priorities.

¹¹ *International optional modules* are optional additional international instruments or procedures offered by the OECD and fully supported by the international contractors. Hereafter, *international optional modules* are referred to as *optional modules*.

meetings, and any other training, such as within-school sampling training, live or pre-recorded training sessions for translation and reconciliation teams, occupational coding training, and data management training.

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.

3.3. Requirements for Meeting and Training Session Attendees

Standard 3.3 Representatives from each national centre who attend international meetings must be able to work and communicate in English.

3.4. Feedback from National Centres to the International Contractors

Standard 3.4 National centres provide timely feedback to the international contractors on the domain frameworks, the 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 NPM Manual.

3.5. Notification of Optional Modules

Standard 3.5 The national centre notifies the OECD Secretariat of its intention to participate in specific *optional modules* (including their choice of a test design) by 28 February 2027. Optional modules can be dropped between the **Field Trial** and the **Main Survey** but not added.

3.6. Notification of National Options

Standard 3.6 *National options are agreed upon* between the National Project Manager, the international contractors, and the OECD Secretariat, before 1 March 2027, in the year preceding the **Field Trial** and confirmed before 1 March 2028, in the year preceding the **Main Survey**.

3.7. Implementation of National Options and Optional Modules

Standard 3.7 Only *national options and optional modules that are agreed upon* between the National Project Manager and the international contractors are implemented.

3.8. Submission of Materials

Standard 3.8 PISA processes are implemented in accordance with guidance provided in the operation manuals, which specify the information and documentation to be submitted by the national centre to the international contractors, within agreed timelines.

3.9. Translation Plan

Standard 3.9 An *agreed upon* Translation Plan will be negotiated between the National Project Manager and the international contractors in accordance with agreed timelines and with the required translation and adaptation procedures.

3.10. Field Trial Participation

Standard 3.10 Participating entities must successfully implement the Field Trial before they are able to participate in the PISA 2029 Main Survey. Unless *agreed upon* between the National Project Manager and the international contractors, a Field Trial should occur in all assessment languages if the language group represents more than 5% of the target population.

3.11. Documentation Required for Quality Assurance of Participation and Timeliness

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

4. Security of Materials and Data Protection

20. **Rationale:** The goal of the PISA assessment is to measure students' literacy in the assessed 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 participants' ability to memorise the test items rather than their underlying competences. Confidentiality of the assessment materials is extremely important to ensure that PISA measures competencies obtained during schooling rather than short-term learning success, and to make valid international comparisons.

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

4.1. PISA Materials Designated as Secure

Standard 4.1 PISA materials designated as secure are always kept confidential. 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.

4.2. Processing of Personal Data by National Centres and International Contractors

Standard 4.2 The PISA Governing Board’s “Framework for Personal Data Protection in PISA” [[EDU/PISA/GB\(2025\)21/ANN1/REV1](#)] serves as a reference document for the OECD Secretariat, the PISA participants, the national centres implementing PISA in their local context, and the OECD’s international contractors, and establishes mutual accountability among all parties for the protection of personal data. Throughout PISA 2029 operations, all parties will comply with it, including any subsequent revisions thereto approved by the PGB.

4.3. 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)
- National Centre Feedback Surveys (Field Trial and Main Survey).

5. Target population

22. **Rationale:** To ensure the comparability of data collected by each participating entity, all students participating in PISA 2029 must constitute a random sample of the *PISA Target Population*, representing a nearly equivalent age range across all participating entities. This requirement ensures differences in student age do not affect the conclusions drawn.

23. Students participating in the Financial Literacy Assessment *optional module* must be selected from the same population as defined for the core PISA 2029 assessment.

24. The optional teacher questionnaire must be administered to a random sample of teachers drawn from the internationally defined *PISA Desired Teacher Target Population*

in each participating entity participating in the Teacher Questionnaire *optional module*¹². Unless otherwise *agreed upon*, the teacher sample shall be drawn from the same sample of schools as the student sample.

5.1. Core PISA Desired Target Student Population

Standard 5.1 The PISA Desired Target Population is *agreed upon*, taking into account specific national education systems and the constraints defined by the *PISA Target Population*. The *PISA Target Population* comprises all students attending schools located within the adjudicated entity, attending grade 7 or higher, who are between 15 years and 3 (completed) months and 16 years and 2 (completed) months at the beginning of the testing period.

5.2. PISA Defined Target Population

Standard 5.2 PISA aims to be as inclusive as possible. The PISA Defined Target Population should ideally coincide with the PISA Desired Target Population and must cover at least 95% of the PISA Desired Target Population. Accordingly, the combined *school-level* and *within-school exclusions* shall not exceed 5%. Wherever possible, students should be accommodated rather than excluded.

- School-level exclusions are restricted to:
 - schools excluded due to geographical inaccessibility, extremely small school size, infeasibility of administering PISA within the school, or other *agreed upon* reasons, where the total number of students represent less than 0.5% of the PISA Desired Target Population; and
 - schools comprising only students who would be classified as within-school exclusions, where the total number of students represent less than 2.0% of the PISA Desired Target Population.
- *Within-school exclusions* shall total less than 2.5% of the PISA Desired Target Population. Such exclusions could include, for example:
 - students who are functionally disabled to the extent that they are unable to participate in the PISA test. Functionally disabled students are those with a moderate to severe permanent physical disability.
 - students with a permanent cognitive, behavioural or emotional disability, as confirmed by qualified staff and which makes them unable to participate in the PISA test. These students are cognitively, behaviourally, or emotionally unable to follow even the general instructions of the assessment.
 - students with insufficient assessment language experience to participate in the PISA test. Students are considered to have insufficient assessment language experience if they meet **all** three of the following criteria:
 - they are not native speakers of the assessment language,

¹² Optional modules – optional additional international instruments or procedures offered by the OECD and fully supported by the international contractors.

- they have very limited proficiency in the assessment language, and
- they have received less than one year of instruction in the assessment language.
- Students for whom no assessment materials are available in the language of instruction.
- Students who cannot be assessed for another reason, as agreed upon.

5.3. Desired and Defined Target Student Population for the Financial Literacy Assessment

Standard 5.3 The desired and defined target population for the Financial Literacy Assessment shall be equivalent to the core PISA desired target population as *agreed upon*.

5.4. Optional PISA Desired Target Teacher Population

Standard 5.4 Teachers who are teaching text-based subjects in the PISA modal grade in the current academic year comprise the teacher target population for the purpose of participating in the Teacher Questionnaire international option. Text-based subjects are defined as subjects in which instruction requires substantial engagement with written texts. This includes subjects where reading comprehension, literature, and other language-related skills are primarily taught according to the national or state curriculum, as well as subjects such as social sciences, history and science when these make intensive use of texts for instruction. Only subjects taught in the language of the PISA reading assessment are included; teachers of foreign language subjects fall outside the scope of this target population.

For some adjudicated entities, the teacher population may be expanded to include teachers—of either reading/language arts or text-intensive subjects—teaching 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.

5.5. Testing Period

Standard 5.5 Unless otherwise *agreed upon*, the testing period:

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

5.6. Documentation Required for Quality Assurance of Population

- Target population agreed with the international contractor and documented on the respective *Sampling Forms*.

6. Sampling

25. **Rationale:** To be able to draw conclusions that are valid for the full population of fifteen-year-old students, a representative sample shall be selected for participation in the test. The sample size shall be sufficient to reduce the uncertainty arising from (finite) sampling in the inferences drawn in each participating entity and across entities. For this reason, minimum numbers of participating students and schools are specified.

26. The procedures used to draw samples for PISA 2029 are crucial to data quality. The goal of PISA is to collect data that are representative of the population, thereby ensuring that results are comparable, reliable, and valid. To achieve this goal, sampling procedures must follow established scientific principles.

27. The sample design commonly used in PISA is a stratified, two-stage random sampling design. In the first sampling stage, schools that enrol students from the PISA desired target population are grouped according to selected observable characteristics. Each group of students is referred to as a *stratum*. Within each stratum, schools are selected to participate in PISA as part of the first sampling stage, which is expected to be conducted by the international contractor. In the second sampling stage, students that belong to the PISA Desired Target Population are sampled from participating schools by national centres using the IEA OSE web-based application, which is constructed in accordance with *agreed upon*, established, and professionally recognised principles of scientific sampling.

6.1. School Sampling for the Main Survey

Standard 6.1 For the **Main Survey**, the international contractor samples schools using *agreed upon*, established, and professionally recognised principles of scientific sampling. These principles include, but are not limited to:

- The identification of appropriate stratification variables to reduce sampling variance and to facilitate the calculation of non-response adjustments.
- The incorporation of an agreed target cluster size of students from the PISA Desired Target Population (and of teachers from the PISA Desired Target Teacher Population, where applicable) to be selected from each sampled school.

6.2. School Sampling Principles for the Field Trial

Standard 6.2 For the **Field Trial**, national centres will have two options for the selection of schools to participate.:

- A random sample drawn by the international contractor together with the Main Survey sample. The Field Trial sample will have similar characteristics to the Main Survey sample.

- A convenience sample drawn by the national centre, which will be reviewed and approved by the international contractor.

The advantages and disadvantages of each Field Trial sample design option will be outlined in the School Sampling Manual and discussed individually with each NPM.

6.3. List of Sampled Schools

Standard 6.3 The international contractors will provide the national centre with a list of sampled schools for the Field Trial and Main Survey, together with their potential replacements (where applicable), **three months** before the agreed start of the respective test administration; unless otherwise discussed and *agreed upon*. National centres may then begin contacting schools to invite them to participate.

- This standard applies regardless of whether the Field Trial sample and the Main Survey sample were drawn together or separately (see Standard 6.2).
- Prior to the administration of PISA instruments, participating schools, students (and teachers, if applicable) must not receive any test materials or training sessions beyond those outlined in Standard 10.7.

6.4. Student Lists for Within-School Sampling

Standard 6.34 Student lists for within-school sampling:

- must include all students belonging to the PISA desired Target student Population in the sampled schools, including students that will be excluded from the test session, and
- must be collected no earlier than 8 weeks prior to the start of test administration or later, unless discussed and *agreed upon*.

6.5. Use of IEA Online Survey Expert by National Centres

Standard 6.5 The IEA Online Survey Expert (OSE) is a web-based application that participating entities are required to use to manage activities related to school participation tracking and within-school sampling. Users of the IEA OSE must have a stable internet connection and meet the minimum system requirements specified in the Within-School Sampling Manual.

6.6. Responsibility of National Centres and School Coordinators in the Secure use of IEA Online Survey Expert

Standard 6.6 National centres and School Coordinators will have access to the IEA OSE. Access rights will be role-based. IEA will provide national centres with the necessary credentials to log into the application. National centres will then be responsible for distributing the log in credentials to the School Coordinators in the

participating institutions, for communicating responsibilities regarding data confidentiality-related procedures, and for ensuring that only authorised School Coordinators have access to the IEA OSE through these credentials.

- School Coordinators will be able to enter and manage all within-school information on the platform. All sensitive or confidential information will be automatically encrypted prior to submission to the national centres. The encryption key will be kept by the School Coordinator. Each School Coordinator will be responsible for safeguarding their respective encryption key and login credentials.
- National centres will be able to enter and manage all school-level information on the platform. All school-level sensitive or confidential information will be automatically encrypted prior to submission to the Contractor. The encryption key will be kept by the national centre. The national centre will be responsible for safeguarding their respective encryption key and login credentials.
- If a participating school does not have stable Internet access, national centres must act as the School Coordinator when entering information onto the platform. Encryption of sensitive or confidential information can still be obtained by a work-around procedure.
- National centres may also act as School Coordinators for any other specific agreed-upon reason.

6.7. Verification of school sample in IEA OSE before test administration and potential modification to Sampling and Tracking Forms / Lists

Standard 6.7 Once the international contractor has provided the national centre with the necessary credentials to access IEA OSE, participating entities must compare the list of sampled schools, and their replacements (if applicable), provided by the international contractor with the set of schools listed in the application prior to starting any within-school sampling activities.

Participating entities may need to further modify some settings in IEA OSE according to *agreed upon structural adaptations*¹³. Participating entities must thoroughly check their versions of IEA OSE as outlined in the Within-school Sampling Manual.

6.8. Student Sampling Principle and Execution

Standard 6.8 National Centres sample students from the student lists collected in accordance with Standard 8.4 using the IEA OSE. This web-based application is

¹³ **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 imported into IEA OSE.

provided by the international contractors for this purpose and applies established, and professionally recognised principles of scientific sampling.

6.9. Alternative Execution of Sampling Procedures

Standard 6.9 Whenever a participating entity:

- chooses to draw the Main Survey school sample, the national centre provides the international contractor with the data and documentation required to reproduce and verify the correctness of the sampling procedures applied.

Any exceptional costs associated with reproducing and verifying a school sample drawn by the national centre will be borne by the national centre.

- In accordance with the *Timeliness* principle governing these Technical Standards, national centres must use the IEA OSE for student sampling and tracking purposes.

6.10. Alternative Methods of Drawing Samples

Standard 6.10 Any agreement with the international contractor on alternative sampling methods for drawing samples must follow the principle that the sampling methods used are scientifically valid and consistent with PISA's documented sampling methods.

6.11. Eligibility for PISA

Standard 6.11 Unless otherwise *agreed upon*, only students sampled as described in Standards 6.1 – 6.34 participate in the test.

6.12. Overall Field Trial Sample Size of Assessed Students

Standard 6.12 The **Field Trial** student sample size will be determined by the test design and the language of assessment:

- For the largest language of assessment in each *adjudicated entity*, the sample size will be set to achieve a minimum of 200 student responses per item.
- 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 student responses 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 student responses per item.

6.13. Overall Main Survey Sample Size of Assessed Students

Standard 6.13 The Main Survey student sample size depends on whether a country participates in Financial Literacy:

- *Without Financial Literacy*: A minimum of 6 300 students is required, and 2 100 for additional adjudicated entities, or the entire PISA Defined Target Population where that population is smaller than 6 300 and 2 100, respectively.
- *With Financial Literacy*: A minimum of 7 150 students is required, and 2 100 for additional adjudicated entities, or the entire PISA Defined Target Population where that population is smaller than 7 150 and 2 100, respectively.

6.14. School Sample Size

Standard 6.14 Unless otherwise *agreed upon*, the school sample for the Main Survey must be sufficient to achieve the desired reliability of cross-country and trend comparisons of mean scores and other statistical indicators between participating entities. Accordingly, the school sample must result in:

- a minimum of 170 participating schools, and 50 participating schools for additional adjudicated entities, or
- the inclusion of all schools enrolling students from the PISA Defined Target Population, where the total number of such schools is fewer than 170 and 50, respectively.

Lower school sample size targets can be *agreed upon* only where there is evidence that the reduced sample size is sufficient to achieve a sampling error for mean score estimates in the core domains not exceeding 2.5 score points on the PISA scale. Such evidence must take into account sampling outcomes from the most recent PISA cycles for the participating entity requesting the reduction.

6.15. School stratification

Standard 6.15 As noted in Standard 6.1, stratification can be an effective technique for reducing sampling variance and facilitating the calculation of non-response adjustments.

- National centres will discuss and agree with the international contractor on the stratification design for the Main Survey sample and, where applicable, the Field Trial sample. This discussion will be guided by the School Stratification Manual.
- To minimise the risk of very small numbers of students or institutions participating within small strata, a minimum of eight schools must be sampled from each explicit school stratum, unless otherwise *agreed upon*. Where an explicit stratum contains fewer than eight schools, all schools in that stratum must be selected to participate.

6.16. Minimum Student Target Cluster Size

Standard 6.16 To ensure adequate coverage of all assessment elements across participating schools, the minimum acceptable sample size within each school is 25 students, or all eligible students in schools with fewer than 25 eligible students enrolled.

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

6.17. School Response Rate

Standard 6.17 For the Main Survey, data from schools with an unweighted PISA student response rate greater than 33% will be included in the PISA datasets, and the school shall be counted as a respondent. Schools that do not meet this threshold shall be classified as a non-respondent, and no student, school-level or teacher data, if applicable, will be retained.

The final weighted response rate must be at least 85%. Where the weighted response rate falls below 85%, but above 65%, an acceptable response rate can still be achieved through the inclusion of the assigned replacement schools. The acceptable response rate (ARR) is, in these cases, higher than 85%, and set as a function of the original response rate before replacement (RRBR), using the following formula:

$$ARR = 85\% + (85\% - RRBR)/2$$

6.18. School-level Non-Response Bias Analysis

Standard 6.18 For the Main Survey, if the final weighted school response rate falls below 85%, before the inclusion of replacement schools, and below the acceptable response rate after their inclusion (see Standard 6.17), national centres will be required to submit a school-level Non-Response Bias Analysis. This analysis must support the argument that no significant bias in student inferences would result from the lower school response rate

In preparing the school-level Non-Response Bias Analysis, national centres will follow the guidelines outlined in the Non-response Bias Analysis Manual prepared by the international contractor.

6.19. Student Response Rate

Standard 6.19 Students sampled for the PISA assessment are considered respondents and included in the analysis if they respond to a minimum of five cognitive items, or a combination of at least one cognitive item and all questionnaire items that contribute to the computation of the socio-economic index.

The final weighted student response rate is at least 85% of all students sampled for the PISA assessment from the PISA Defined Target Population, calculated across participating schools.

6.20. Student-level Non-Response Bias Analysis

Standard 6.20 For the Main Survey, if the final weighted student response rate falls below 85% of sampled eligible and non-excluded students (see Standard 6.19), national centres will be required to submit a student-level Non-Response Bias Analysis. This analysis must support the argument that no significant bias in student-level inferences would result from the lower student response rate among students in participating schools.

In preparing the student-level Non-Response Bias Analysis, national centres will follow the guidelines outlined in the Non-response Bias Analysis Manual prepared by the international contractor.

6.21. Questionnaire Data Treatment in OECD Reports

Standard 6.21 Students will be counted as respondents according with Standard 6.19.

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

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

6.22. Documentation Required for Quality Assurance of Sampling

- Sampling procedures as specified in the PISA operations manuals
- Sampling forms submitted to the international contractor
- School sample drawn by the international contractors (or if drawn by the national centre, then verified by the international contractor)
- Student sample drawn through the international contractor's web-based application IEA OSE.
- National Centre Feedback Surveys (Field Trial and Main Survey).
- Non-Response Bias Analyses prepared by national centres (if applicable).

7. Assessment

28. **Rationale:** 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.

7.1. Core PISA 2029 Test

Standard 7.1 The core test for PISA 2029 is a computer-based 2-hour test that includes the assessment of Reading (focal domain), Mathematics, Science, as well as MAIL.

7.2. Core PISA 2029 Questionnaires

Standard 7.2 The core PISA questionnaires are delivered in a computer-based mode and include a 35-minute 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 to PGB representatives by the OECD Secretariat.

7.3. Optional PISA 2029 Financial Literacy Assessment

Standard 7.3 One of the *optional modules* offered for PISA 2029 participants is the Financial Literacy Assessment, which will assess students' ability to understand, manage, and apply knowledge to financial concepts, risks, and situations.

7.4. Optional PISA 2029 Questionnaires

Standard 7.4 PISA 2029 also includes a number of optional questionnaire components. The final decision on the options supported by the international contractors (i.e. *optional modules*) will depend on the number of participants opting for them.

. Participating entities that choose to administer the optional assessment of Financial Literacy will also administer a Financial Literacy Questionnaire for students in addition to the core student questionnaire.

In addition to the core questionnaires, participating entities may choose to administer some of the optional questionnaires. The choice of *option module* questionnaires is limited in PISA 2029 to the following:

- An Emerging Policy Questionnaire, which is administered to the students participating in the core computer-based PISA assessment.
- A computer- or paper-based Parent Questionnaire, which is administered to parents of the students participating in the PISA assessment.
- A computer-based Teacher Questionnaire (eligible teacher population defined in Standard 5.4).

7.5. Assessment Development

Standard 7.5 All test materials and questionnaires, including core and optional modules are developed by international contractors using established, and professionally recognised principles of test and questionnaire development. These principles include, but are not limited to:

- Tasks must elicit responses that can provide evidence of the test takers' capacity in the domain being assessed.
- Tasks must draw on knowledge and understanding that are intrinsic to the domain
- Tasks must be presented in a format appropriate to the type of question being asked, without unnecessarily relying on extrinsic skills.
- The set of tasks must provide coverage of the area of learning under investigation
- They must be practical to administer.

7.6. Modes of Assessment

Standard 7.6 PISA 2029 will continue to support online and offline delivery modes within the *computer-based assessment* (CBA).

7.7. Test Designs

Standard 7.7 PISA 2029 supports two assessment designs for the Main Survey, among which each national centre must select one:

- the *Design without Financial Literacy* includes core domains and the innovative domain (MAIL),
- the *Design with Financial Literacy* includes core domains, the innovative domain (MAIL), and the optional module of Financial Literacy as part of a single assessment sample.

Both designs aim to minimise differences in the allocation of testing time across the three core domains and the innovative domain (MAIL) for larger entities (“balanced design”); for smaller entities a stronger priority is assigned to the assessment of the focal core domain.

7.8. Language of Assessment

Standard 7.8 The PISA test is administered to a student in a language of instruction provided by the sampled school to that sampled student in the focal domain (Reading) of the test.

If the language of instruction 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 by the 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 the corresponding school subject. Information obtained from the *Field Trial*¹⁴ 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.

¹⁴ 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 participating entities and that they are properly translated; and
2. to test the operational procedures.

7.9. Documentation Required for Quality Assurance of Assessment Standards

- Test and questionnaire designs created by the international contractors, recommended by the Technical Advisory Group and approved by the PGB¹⁵

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

29. **Rationale:** To enable valid comparisons of performance across participating entities, 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. Accordingly, not only the assessment instruments, but also the instructions given to the students and the data collection procedures must be consistent across participating entities and languages.

30. 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 entities.

8.1. Test Items Used in Previous Cycles

Standard 8.1 National versions of test items used in previous cycles will be administered without modification, except where revisions have been made to the source version, where an outright error has been identified in a national version, or when a change in the national context calls for an adjustment. A change to make the trend units more accessible and responsive to different screen resolutions will result in slightly different layout but they will be functionally equivalent to those in the previous PISA cycles. The display of trend items in the PISA 2029 assessment platform will be quality assured by the Core A Contractor for the English version and by national centres for all other language versions.

8.2. Questionnaire Items Used in Previous Cycles

Standard 8.2 National versions of questionnaire items used in previous cycles will be administered without modification, except where revisions have been made to the source version, where an outright error has been identified in a national version, or when a change in the national context calls for an adjustment. A change to make the questionnaires more accessible and responsive to different screen resolutions will result in slightly different layout.

¹⁵ Questionnaires will be reviewed by the Questionnaire Expert group, and new reading items will be reviewed by the Reading Expert Group.

8.3. Adaptations to the Source Versions of Tests and Questionnaires

Standard 8.3 The national versions of the tests and questionnaires must be as linguistically equivalent to the source version¹⁶ 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* between the National Project Manager and the international contractors.

8.4. Adaptations to the School-level Materials

Standard 8.4 The national versions of the school-level materials¹⁷ must remain consistent with the English source versions. Any adaptations required to reflect the local context must be *agreed upon* between the National Project Manager and the international contractors.

8.5. Translation of Assessment Materials

Standard 8.5 The following materials are translated or adapted from the English source version, adapted from the French reference version for Participants that administer the instruments in French, adapted from a verified borrowed version, or adapted from a centrally produced common reference version into the assessment language by the participating entities—and verified by the international 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 test instruments
- All administered questionnaires
- The Coding Guides (unless *agreed upon*).

8.6. Human translation requirement of Tests and Questionnaires

Standard 8.6 All translations of test materials, coding guides, and questionnaires made by national centres shall be produced entirely by human translators, without reliance on generative artificial intelligence or machine translation at any stage of production. The

¹⁶The international source versions of the assessment instruments is provided in English. The international contractors will also provide a French reference version. according to contractual specifications.

¹⁷ 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.

second translation may be produced by the international contractors using supervised automated translation tools that maintain the confidentiality of the test materials.

Test materials that follow the double translation process include stimuli and items but do not include the simulated online environment in MAIL tasks. All questionnaires follow the double translation process.

Coding guides and School-level materials follow a single translation process, and the human translation requirement applies to these materials.

8.7. Translation of School-level Materials

Standard 8.7 Unless otherwise *agreed upon* between the National Project Manager and the international contractors, school-level materials are translated or adapted into the assessment language. These translations or adaptations must be functionally equivalent to the international English *source version*.

8.8. Verification of translated materials

Standard 8.8 Questionnaires must be 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:

- align with local usage or context
- preserve equivalence where a straightforward translation cannot ensure equivalence
- collect country-specific data in addition to data for the international dataset.

Adaptations made to test materials must be documented before these materials are submitted for linguistic verification. The adaptation approval procedures are described in detail in the *Translation and Adaptation Guidelines*.

8.9. Documentation Required for Quality Assurance of Translation and Adaptation

31. 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, whereby any newly translated questionnaires and cognitive instruments follow a double translation and reconciliation process; and whereby any materials adapted from the English source version, from the French reference version or from a verified borrowed version (from another participant) follow a thoroughly documented adaptation process.
- *Agreed upon* Questionnaire adaptations, in the relevant monitoring forms in the Workflow Manager

- Online forms and reports in the Workflow Manager, 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.
- Verification feedback in the relevant monitoring forms in the Workflow Manager
- National Centre Feedback Surveys (Field Trial and Main Survey)
- Item and scale statistics generated by the international contractors (assessment materials and questionnaires).

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

32. **Rationale:** Participating entities administering the PISA assessment in the computer-based mode must thoroughly test and validate the implementation of the national version and adaptations of the test and questionnaire assessment materials, in the digital platform 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 country/economy, including hardware issues and provision of technical support to schools and *Test Administrators*.

9.1. CBA Test Platform

Standard 9.1 The international contractors will test and provide written quality assurance confirming that both online and offline CBA solutions meet with the PISA 2029 assessment delivery specifications, including implementation of the national versions of the test and questionnaire instruments.

Participating entities must test the national test versions within the assessment delivery platform, following established testing plans as outlined in documentation provided to national centres, to ensure the correct implementation of national adaptations, the 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 to ensure that any identified errors are promptly resolved.

9.2. CBA Software Helpdesk Provision

Standard 9.2 Each participating entity should designate a PISA helpdesk and provide contact information to all *Test Administrators* and *School Co-ordinators* (or *School Associates*).

9.3. Helpdesk Staff Responsibilities

Standard 9.3 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 CBA and appreciate the challenges faced by schools and *Test Administrators*.

9.4. 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
- National Centre Feedback Surveys (Field Trial and Main Survey).

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

33. **Rationale:** To obtain valid assessment results, the data collected must be of high quality, i.e. the data must be collected in a consistent, reliable and valid manner. This objective is achieved primarily through the work of the *Test Administrator*

The *PISA Quality Monitors*¹⁸ monitor the data collection activities during the Main Survey within participating entities to ensure adherence to the standards related to test administration.¹⁹

10.1. Trainer Test Administrator Training Sessions

Standard 10.1 NPMs or their designee shall receive trainer training from qualified contractor staff on PISA materials and procedures, to prepare them to train their PISA *Test Administrators*.

¹⁸ *PISA Quality Monitor* – person(s) nominated by the National Project Manager and employed by the international contractors to monitor test administration quality their participating entity

¹⁹ New participating entities in the PISA 2029 cycle are required to participate in quality monitoring procedures during the Field Trial.

10.2. Training Materials

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

10.3. Test Administrator Training

Standard 10.3 NPMs or their designees shall conduct Test Administrator training in person and/or online, unless a suitable alternative is *agreed upon*.

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 they administer
- the reading, mathematics, or science instructor of any student in the assessment sessions they administer

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 Test Administrator’s Manual or School Associate’s Manual, with particular attention to:

- test session timing
- maintaining standardised test conditions
- responding to students’ questions
- student tracking, and
- providing login details (for CBA).

Test Administrators must conduct all test sessions using the Test Administration Script. Test Administrators are required to follow the script word-for word to ensure consistency of all test sessions across participating entities. Deviations from the script may lead to errors in data collection and reduce the comparability of results

10.6. Administration of National Option Instruments

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

10.7. Information and Training Prior to the Test Session

Standard 10.7 Participating schools, students and/or teachers should only receive general information about the test prior to the test sessions. 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.

10.8. Rewards

Standard 10.8 National centres must not offer rewards or incentives to students, teachers, or schools that are linked to student achievement in the PISA assessment.

This restriction does not apply to incentives or rewards intended to encourage and improve participation, provided they are unrelated to student achievement in the PISA assessment.

10.9. Monitoring of Test Administration

Standard 10.9 Trained independent PISA Quality Monitors monitor PISA Main Survey test administrations through site visits.

10.10. PISA Quality Monitoring Training

Standard 10.10 PQMs must successfully complete the self-training materials, participate in webinars to review and reinforce the self-training, and attend the Test Administrator training organised by the national centre, unless otherwise *agreed upon*.

10.11. PISA Quality Monitoring Site Visits

Standard 10.11 Ten site visits to observe test administration sessions shall be conducted in each participating entity, with five additional site visits in each additional adjudicated region for the **Main Survey**.

For each participating entity that is a new participant to PISA 2029, five additional site visits during the Field Trial shall be conducted to observe test administration sessions and identify potential issues that can be rectified prior to the Main Survey.

10.12. Selection of Test Administration Visits

Standard 10.12 The national centre provides the international contractors the assistance required to implement the site visits effectively. This includes nominating a sufficient number of qualified individuals to ensure that the required number of schools is observed, as well as providing timely and accurate communication of school contact information and scheduled test dates.

Test administration sessions that are the subject of site visits are selected by the international contractors, in consultation with PQMs, and shall be representative of a variety of schools within the participating entity.

10.13. 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
- National Centre Feedback Surveys (Field Trial and Main Survey)
- Record of standard training of PQMs
- PISA Quality Monitors feedback and Data Collection Forms (only for Main Survey)
- PISA Quality Monitoring Observation Report (only for Main Survey)

11. Response Coding

34. **Rationale:** All coding procedures for the core PISA assessment must be standardised, follow approved coding designs, and coders must complete training sessions to ensure the comparability of the data.

11.1. Coder Recruitment

Standard 11.1 Coders are recruited following procedures specified in the *PISA Coding Procedures*.

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 procedures specified in the *PISA Coding Procedures*.

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 Coding Procedures*. These procedures are implemented in the coding software that participating entities will be required to use. The coding design for PISA 2029 replicates the design used in previous cycles of PISA.

11.6. Documentation Required for Quality Assurance of Coding

- Indices of inter-coder agreement
- National Centre Feedback Surveys (Field Trial and Main Survey)

12. Data Management

35. **Rationale:** The timely progression of the project within the prescribed timelines depends on the quick and efficient submission of all collected data. To minimise errors during the consolidation of national databases, any changes in data format implemented after the initial agreement must be announced. As the consolidation and merging of national databases is a complex and time-intensive process, the international contractors require ongoing access to national resources to clarify uncertainties and resolve discrepancies in a timely manner.

12.1. Data Manager and Data Administration Responsibilities at National Centres

Standard 12.1 Each national centre must nominate one *Data Manager* and one or more *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* is responsible for the handling of PISA data within the national centre, as outlined in the Data Management Manual. The *Data Manager* must:

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

12.2. Data Manager Training

Standard 12.2 The *Data Manager* from each national centre must attend the international PISA data management training session for the **Field Trial and Main Survey**.

12.3. Data Administrator Training

Standard 12.3 *Data Administrators* are trained by *Data Managers* following agreed procedures outlined in the Data Management Manual.

12.4. Storing of Data at the National Centre

Standard 12.4 National centres store PISA data using the software provided by international contractors:

- Sampling data are stored and encrypted (if applicable) in the IEA OSE web-based application.

- Student assessment responses, including questionnaire data from schools, and teachers, if applicable, are stored in the assessment delivery platform
- Students' open-ended cognitive responses are stored in the ACER Marking System.

Paper-based responses to the Parent Questionnaire are stored in ACER Marking System. All data must be stored secure in accordance with the standards outlined in Section 4 of this document.

12.5. Data Submission Prerequisite

Standard 12.5 Before data is submitted by national centres it must be validated by the *Data Manager* as outlined in the Data Management Manual.

12.6. Data Submission Timeline

Standard 12.6 The timeline for submission of *complete set of PISA data*²⁰ 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*.

12.7. Response Data Mode of Delivery

Standard 12.7 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 responses are submitted via the assessment delivery platform. Response data also includes log-file information such as, but not limited to, time stamps.
- Paper-based responses to the Parent Questionnaire are submitted via non-confidential database exported from the ACER Marking System.

²⁰*Complete set of PISA data* includes all sampling data and all response data, which contain all responses of participants to all test and questionnaire instruments.

12.8. Response Data Conditions

Standard 12.8 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.

12.9. Accompanying documentation

Standard 12.9 Each participating entity submits its data with full documentation as specified in the *Data Management Manual*.

12.10. Documentation Required for Quality Assurance of Data Management

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

13. Archiving of Materials

36. **Rationale:** The international contractors will maintain an electronic archive that provides a comprehensive record of all materials used. The archive will ensure continuity of materials across PISA survey cycles for participating entities, thereby supporting the accumulation and retention of national knowledge developed over successive PISA cycles. This will also ensure that the relevant materials are readily to the international contractors when required, including data cleaning activities.

13.1. Scope of Archiving

Standard 13.1 Archiving applies to all materials from both the **Field Trial** and the **Main Survey**, including student and school assessment materials and, where applicable, parent and teacher materials, as well as relevant school-level materials and coding guides.

13.2. National Materials to be Archived at the National Centres

Standard 13.2 National materials to be archived at the national centre include:

- all sampling forms²¹
- all student lists and, where applicable, all teacher lists
- all Student Tracking Forms and, where applicable, all Teacher Tracking Forms)
- all respondents' paper-based questionnaires (for participating entities that administered the Parent Questionnaire as a paper-based assessment).

The archiving period for these materials will comply with the *Framework for Personal Data Protection in PISA*²², as approved by the PISA Governing Board.

13.3. National Materials to be Submitted by National Centres to the International Contractors for Archiving

Standard 13.3 Upon approval of the final versions, the National Project Manager shall submit one copy of each of the following adapted and translated **Main Survey** materials to the international contractors, via *PISA Connect*:

- electronic national versions of the school-level materials, and
- electronic national versions of the Coding Guides.

13.4. National Materials to be Archived by the International Contractors and the OECD

Standard 13.4 The international contractors are responsible for preparing and providing the PISA 2029 materials (all Test and Questionnaire instruments, school-level materials and Coding Guides, including all national versions) to the OECD for archiving.

The international contractors are also responsible for archiving the following:

- all response files from the assessment delivery platform
- all data submitted by national centres to International Contractors, including sampling forms.

The OECD will maintain a permanent electronic archive of the PISA 2029 materials. Test and Questionnaire instruments, school-level materials and Coding Guides, including all national versions.

Central archiving by the OECD or its international contractors will comply with the *Framework for Personal Data Protection in PISA*.

²¹ *Sampling forms* refers to the forms outlined in the School Sampling Manual, *agreed upon* and uploaded on the PISA Connect.

²² The *Framework for Personal Data Protection in PISA* is available at: [[EDU/PISA/GB\(2025\)21/ANN1/REV1](https://www.oecd.org/education/pisa/2025/PISA-2025-ANN1-REV1)].

13.5. Documentation Required for Quality Assurance of Archiving

- Materials listed in Standards 13.2 and 13.3

14. Databases for Reporting

14.1. Reference versions of PISA Databases

Standard 14.1 The international contractors will prepare the reference version of the de-identified databases for analysis and reporting, on behalf of the OECD. These include a national database for each participating entity, an international database collating data from all participants, and a public version of the international database. The OECD and the international contractors will comply with all related requirements set by the *Framework for Personal Data Protection in PISA*.

14.2. Withdrawing of National Data from the International Database

Standard 14.2 The PGB will determine the deadline and procedures for withdrawing national data from the international PISA database. Participating entities can withdraw their data only prior to obtaining access to data from other participating entities. Withdrawn data will not be made available to other participating entities. Conversely, participating entities that withdraw their data will not be given access to the “international database” containing data from other participating entities.

14.3. Publication of National Results

Standard 14.3 Each participating entity can publish its own data after the date established by the PGB for the release of the initial international OECD publication.

14.4. Copyright

Standard 14.4 As the guardian of the PISA process and producer of the international database, the OECD will hold copyright in the database and in all original materials developed for, or included in, the PISA **Field Trial** and PISA **Main Survey**, including assessment materials, school-level materials, and coding guides) in any language and format.

Glossary

ACER – Australian Council *for* Educational Research, the Core A and Core B contractor for PISA 2029 (<https://www.acer.org/au/>).

Adaptation - an intentional addition to, deletion from or deviation from the international source version, made to align with local usage or context; to preserve 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 endorse, 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 – a decision reached by mutual agreement between the relevant parties (e.g. the National Project Manager, the international contractors, and/or the OECD Secretariat), as specified in the relevant standard

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:

- give participating entities the opportunity to try out the logistics of their test procedures; allow the international contractors to make detailed analyses of the *items* so that only suitable ones are included in the Main Survey.

HallStat – PISA translation referee.

IEA International Association for the Evaluation of Educational Achievement, the Core C contractor for PISA 2029 (<https://www.iea.nl/>).

IEA OSE The IEA’s Online Survey Expert is the web-based application used for within-school sampling and tracking purposes.

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]).

Item - a question, a statement or a task in tests and questionnaires that requires a response from participants (students, school principals or school administrators, and if applicable, teachers and parents).

Media and Artificial Intelligence Literacy (MAIL) – the innovative assessment domain for PISA 2029.

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 optional module only in some, not all, jurisdictions. The participating entity will in this case sign up for the optional module option with the OECD, as if it was administered in the entire jurisdiction, and the additional work involved with administering the optional module to part of the jurisdiction only is considered a national option.

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

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.

PISA National Project Manager (NPM) – The NPM is responsible for

- a) overseeing all national tasks related to the development and implementation of PISA throughout the entire cycle
- b) ensuring that tasks are carried out on schedule and in accordance with the specified international standards
- c) communicating with the international contractor on all operational matters relating to the adjudicated entities for which the NPM is responsible.

PISA Operations Manuals – all manuals provided by the international contractors. Their preparation 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 project website for PISA 2029 and is maintained by the Core A Contractor. It is the main channel for communication between the international contractors and participating national centres.

PISA Quality Monitor (PQM) – person(s) nominated by the *National Project Manager* and employed by the international contractors to monitor test administration quality in their participating entity.

PISA Target Population – students attending all schools located within the participating 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.

- 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 PISA Defined Target Population is equivalent to the PISA Desired Target population in the schools that are listed on the school sampling frame.
- **Questionnaire Expert Group (QEG)** - A group of experts who are responsible for linking the policy objectives identified by the PGB with expertise in the relevant area. The QEG facilitates the consensus on content and technical issues raised by participating entities within the broader framework and objectives of the overall implementation strategy as well as providing subject-matter expertise to guide instrument development and review.

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

- **Quality control mechanisms** 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.

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 – international contractors’ approved exclusion of schools from the sampling frame because of, for example:

- geographical inaccessibility
- extremely small school size
- all students in the school being within-school exclusions.

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 and Session Report Form
- **SMEG – Subject Matter Expert Groups** are responsible for linking the policy objectives identified by the PGB with expertise in the relevant area. These groups

facilitate consensus on content and technical issues raised by participating entities within the broader framework and objectives of the overall implementation strategy as well as providing subject-matter expertise to guide instrument development and review.

Source versions of the assessment instruments are provided in English (and a French reference source) 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 provides advice on the technical features of the assessment, including scaling and sampling methodologies, and contributes to ensuring the technical quality and integrity of the data.

Target cluster size – the number of students (or teachers, when applicable) that are to be sampled from schools where not all students (or teachers, when applicable) 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 a participating entity.

Translation plan – documentation of all the processes that are intended to be used for all activities related to translation and languages. It will be negotiated between each national centre and the international contractors.

Within-school exclusions – potential exclusion of students from assessment within participating schools 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 permanent 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, <https://doi.org/10.1787/9789264228368-en>. [1]