CALL FOR TENDERS
RFQ_432

FOURTH CYCLE OF THE OECD TEACHING AND LEARNING INTERNATIONAL SURVEY (TALIS 2024)

* 

CORE A: MAIN SURVEY AND CENTRALISED TASKS FOR INTERNATIONAL MODULES

* 

CORE B: CONCEPTUAL FRAMEWORK AND INSTRUMENT DEVELOPMENT (OPTIONAL ISCED 0 MODULE (TALIS STARTING STRONG))

* 

CORE C: INSTRUMENT DEVELOPMENT (OPTIONAL SURVEY OF NOVICE TEACHERS)

* 

CORE D: CONCEPTUAL FRAMEWORK AND INSTRUMENT DEVELOPMENT (OPTIONAL TEACHER KNOWLEDGE SURVEY ASSESSMENT MODULE)

The deadline date for the receipt of tenders is Friday 29 May 2020, 14:00 (Paris time)
Preamble

The OECD brings together the governments of countries committed to democracy and the market economy from around the world to:

- Support sustainable economic growth
- Boost employment
- Raise living standards
- Maintain financial stability
- Assist other countries' economic development
- Contribute to growth in world trade

The OECD also shares expertise and exchanges views with more than 100 other countries and economies, from Brazil, China, and India to the least developed countries in Africa.

Fast facts

- Established: 1961
- Location: Paris, France
- Membership: 36 countries
- Secretariat staff: 3 300
- Secretary-General: Angel Gurría
- Publications: 250 new titles/year
- Official languages: English/French

Monitoring, analysing and forecasting

For over 50 years, the OECD has provided statistical, economic and social data comparable with the most important and most reliable in the world. In addition to its collection of data, the OECD monitors trends and analyses, and forecasts economic developments. The Organisation studies changes and developments in trade, environment, agriculture, technology, taxation and more.

The Organisation provides a setting where governments can compare their experiences in developing public policies, seek answers to common problems, identify good practices and coordinate both domestic and international policies.

Enlargement and Key Partners

OECD member countries agreed to open accession discussions with Colombia in 2013, and with Costa Rica in 2015. The Organisation is also reinforcing its engagement with its Key Partners – South Africa; Brazil, China, India and Indonesia.

Publishing

The OECD is one of the world's largest publishers in the fields of economics and public policy. OECD publications are a prime vehicle for disseminating the Organisation's intellectual output, both on paper and online.

Publications are available through the OECD Network Environment (O.N.E) for government officials, through OECD iLibrary for researchers and students in institutions, corporate, subscribed to our online library for individuals who wish to browse titles free-of-charge and also to purchase publications.
# Table of Contents

Preamble.................................................................................................................................................. 2

Instructions to tenderers................................................................................................................................ 4

TALIS 2024: Terms of reference .................................................................................................................. 8

1.1. Introduction............................................................................................................................................ 8
1.2. Section 1: Overview of TALIS and project design of TALIS 2024...................................................... 9
1.3. Section 2: Statement of work.................................................................................................................. 27
1.4. Core A: Main survey and centralised tasks for all modules ................................................................. 27
1.5. Core B: Conceptual framework and Instrument development for the optional ISCED 0
module (TALIS Starting Strong)...................................................................................................................... 49
1.6. Core C: Instrument development for the optional survey of novice teachers...................................... 52
1.7. Core D: Conceptual framework and instrument development for the optional Teacher
Knowledge Survey assessment module........................................................................................................... 54
1.8. Section 3: Personal data protection........................................................................................................ 59
1.9. Section 4: Schedule................................................................................................................................. 61
1.10. Section 5: Guidelines for bidders and evaluation criteria...................................................................... 73

References .................................................................................................................................................... Error! Bookmark not defined.

Minimum general conditions for OECD contracts ....................................................................................... 87
Instructions to tenderers

ARTICLE 1 - PURPOSE AND OBJECT OF THE CALL FOR TENDERS

The Organisation for Economic Co-operation and Development (OECD), in the context of the fourth cycle of the OECD Teaching and Learning International Survey (TALIS 2024), invites proposals for the provision of services in relations to TALIS 2024.

This call for tenders is divided in 4 distinct Cores:

- Core A: main survey and centralised tasks for international modules
- Core B: conceptual framework and instrument development (optional ISCED 0 module (TALIS Starting Strong))
- Core C: instrument development (optional survey of novice teachers)
- Core D: conceptual framework and instrument development (optional teacher knowledge survey assessment module)

ARTICLE 2 - TERMS AND CONDITIONS OF THE CALL FOR TENDERS

2.1 Composition of the Call for Tenders

The documentation relating to the Call for Tenders includes the following parts:

a) Instructions to Tenderers;
b) Terms of Reference;
c) Minimum General Conditions for OECD Contracts;
d) Supporting documents are shared on the eSourcing platform.

2.2 Tenders

All Tenders will be treated as contractually binding for the Tenderer and the Tenderer shall consequently issue in response to this Call for Tenders a Letter of Application dated and signed, in accordance with Article 3.2 below.

2.3 Duration of Tender validity

Tenders shall remain valid for one hundred and eighty (180) calendar days, as from the deadline for receipt of Tenders.

2.4 Additional information

Should any problems of interpretation arise in the course of drawing up the Tender documents, Tenderers may submit their questions through the OECD e-Sourcing portal via the secure messaging function [https://oecd.bravosolution.com/web/en/login.html], no later than seven (7) calendar days before the deadline for the receipt of Tenders. All Tenderers will be informed of the answers given to such questions.
2.5 Communication
The OECD’s Central Purchasing Group (CPG) shall be the Tenderers sole point of contact throughout the tender process. All communication relating to this Call for Tenders shall be done directly through the eSourcing platform or directly with a member of the CPG, as outlined in 2.4. To ensure fairness and transparency, the Organisation reserves the right to reject any Tender documents where the Tenderer has had direct contact with other OECD personnel involved in the Call for Tenders process.

2.6 Acceptance and rejection of Tenders
There is no obligation on the part of the Organisation to accept any Tender or part thereof that is received in response to the Call for Tenders.

The OECD reserves the right:
- To accept Tenders with non-substantial defects
- To reject Tenders received after the deadline for receipt of Tenders, without indemnity or justification.

2.7 Modification or cancellation of Call for Tenders
The Organisation reserves the right to modify or cancel all or part of the Call for Tenders, should the need arise, without having to justify its actions and without such action conferring any right to compensation in favour of the Tenderers.

2.8 Partnerships
Partnerships must jointly meet the administrative requirements set out in the Call for Tenders. Each partner must also meet full requirements individually.

2.9 Extension of the deadline for receipt of Tenders
The OECD reserves the right to extend the deadline for receipt of the Tenders. In that case, all the Tenderer’s and Organisation’s rights and duties and in particular Article 2.3 above will be subject to this new deadline.

2.10 Costs and Expenses
Tenders are not paid. No reimbursement of expenses related to the preparation of any Tender will be made by the OECD.

2.11 Confidentiality
The Call for Tenders and any further information communicated to the Tenderer or which come to their knowledge in the course of the Call for Tenders and the performance of the work are confidential and are strictly dedicated to the purpose of the Call for Tenders. The OECD reserves the right to request to have all documents and information and copies, regardless of the format, to be returned at the end of the Call for Tenders process or to receive a written attestation that they have been destroyed.
ARTICLE 3 - PRESENTATION, SUBMISSION AND CONTENTS OF TENDERS

3.1 Tender presentation and conditions for submission

Tenders shall be entirely drafted in either English or French and shall be received by the Organisation before the deadline date.

In accordance with the OECD’s Greening initiative, Tenderers are strongly encouraged and recommended to use the eSourcing portal to submit their Tenders.


Otherwise, Tenderers are invited to send one (1) paper copy and one electronic version (e.g. USB Key) in an envelope bearing only the words:

« NE PAS OUVRIR par le service courrier
Appel d’Offres RFQ_432 »

To the following address:

OECD
EXD/PBF/CPG
For the attention of Giorgio CERNIGLIA
2 rue André Pascal
75775 Paris Cedex 16
FRANCE

Tenders which are received by the Organisation after the deadline specified above as well as Tenders which do not fully comply with the Technical Specifications may, at the sole discretion of the Organisation, be rejected and returned to the Tenderer.

Tenders received in any format other than: by paper copy or via the eSourcing portal shall be systematically rejected.

3.2 Contents of the Tender

Tenderers must provide:

- A Letter of Application, signed by the Tenderer. A template is available for download on the OECD eSourcing platform in the ‘Attachments’ section, which contains all of the necessary information;
- A Declaration signed by the Tenderer. A template is available for download on the OECD eSourcing platform in the ‘Attachments’ section, which contains all of the necessary information;
- Moreover, the Tenderer shall provide, to the extent possible and where applicable, certificate(s) identifying the Tenderer, including its name, legal form, address, registration number or equivalent, date founded, areas of activity and number of employees.

Please note that the Tenderer, should it be shortlisted, will be asked to provide the following:

- Any relevant existing agreements with intermediaries or third parties;
- Financial information for the last three (3) years;
• Proof of completed legal obligations with regards to tax declarations and payments in its home country and all the requisite certificates to that effect.

3.3 Financial Conditions

Prices quoted in the Tender must include all costs necessary for the complete execution of an eventual contract (insurance, transport, guarantees). Charges for items essential to execution of the contract and not identified in the Tender will be borne by the Tenderer.

Bidders are requested to provide a cost breakdown in their financial offer using the price grids provided.

ARTICLE 4 - INTERVIEWS

The Organisation reserves the right to organise interviews and request the Tenderers to specify the content of their Tenders.

ARTICLE 5 – SELECTION CRITERIA

The selection criteria below will be used to evaluate project proposals for Cores A to D. Sub-criteria for these are detailed in Section 5 of the Terms of Reference.

a Overall approach 35%;
b Understanding of the project design and architecture, and expertise on the content 15%;
c Organisation and staff 25%;
d Financial evaluation of the overall cost of the proposal 25%.

The Organisation will not accept financial offers that are not filled in with all the information requested or that are submitted in a different format from that of the price grids provided.

ARTICLE 6 - INFORMATION TO TENDERERS

All Tenderers will be informed, whenever possible, of the decision taken on their Tenders.
1.1. Introduction

1. The OECD invites proposals for the implementation of the fourth cycle of the OECD Teaching and Learning International Survey (TALIS 2024). This document provides the terms of reference for the Contractor(s) for TALIS 2024. As in previous TALIS cycles, the main survey will survey nationally representative samples of lower secondary teachers and the principals of corresponding schools (corresponding to the International Standard Classification of Education (ISCED) level 2) across a number of OECD countries and partner countries. Teachers will answer a teacher questionnaire and principals a principal questionnaire, asking questions about their background, their practices, their working conditions and the learning environment in their schools. Like with previous cycles, countries will have the possibility to participate in the following modules: administering the main survey questionnaires at the primary and upper secondary levels (referred to as the ISCED level 1 and ISCED level 3 modules) as well as in the schools that participate in PISA 2024 (referred to as the TALIS-PISA link module). A minimum of 10 countries will be required for each of these “usual” modules to materialise.

2. TALIS 2024 will also offer countries the possibility to participate in three additional modules:

- First, countries could survey staff members and leaders of Early Childhood Education and Care (ECEC) centres through the means of specific questionnaires (referred to as TALIS Starting Strong Survey or the ISCED 0 module). A minimum of 8 countries/economies will be required for this module to materialise.

- Second, countries will also have the possibility to conduct a more in-depth survey of novice teachers teaching in lower secondary schools (referred to as the novice teachers’ module). This would be the first time that the OECD will conduct a large-scale international survey specifically targeting novice teachers. A minimum of 8 countries/economies will be required for this module to materialise.

- Third, all countries that participate in TALIS 2024 can opt to administer an additional Teacher Knowledge Survey assessment (referred to as the TKS assessment module) to the main survey population of lower secondary teachers (ISCED level 2) and the optional survey population of novice teachers (only in case the novice teachers module above is implemented). A minimum of 8 countries/economies will be required for developing the TKS assessment module (with no minimum restriction for the novice teachers population).

3. The call for tenders is made up of four cores:

- Core A is the main core covering the development, implementation and reporting of the main survey (ISCED 2) and the usual modules (ISCED 1, ISCED 3 and TALIS-PISA link) as well as all the tasks that concern all survey components (including the additional modules), but which are required to be centralised, i.e. managed by one single contractor, so to ensure consistency and high-level standards for all the components of the survey (these include sampling, translation procedures and verification, field operation procedures, data collection and processing, quality assurance processes, construction of datasets and documentation of technical operations, data adjudication, project management and assistance with the preparation of the reporting plan and of drafts of the final report prepared by the OECD Secretariat).

- Core B is the core covering the development of the conceptual framework and survey instruments for TALIS Starting Strong (the ISCED 0 module).

- Core C is the core covering the development of survey instruments for the novice teachers’ module.
Core D is the core covering the development of the conceptual framework and survey instruments of a Teacher Knowledge Survey assessment module.

Table 1 below summarises how the development of TALIS 2024 is divided across the Cores A to D and across their respective tasks (for a description of each task, see Section 2).

<table>
<thead>
<tr>
<th>Core A: Task A1</th>
<th>Core A: Task A2</th>
<th>Core A: Task A3</th>
<th>Core A: Task A2 (concept paper only) and Tasks A4-A12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core B: Task B1</td>
<td>Core B: Task B2</td>
<td>Core B: Task B3</td>
<td>Core B: Task B3 and Tasks B4-B12</td>
</tr>
<tr>
<td>Core C: Task C1</td>
<td>Core C: Task C2</td>
<td>Core C: Task C3</td>
<td>Core C: Task C3 and Tasks C4-C12</td>
</tr>
<tr>
<td>Core D: Task D1</td>
<td>Core D: Task D2</td>
<td>Core D: Task D3</td>
<td>Core D: Task D3 and Tasks D4-D12</td>
</tr>
</tbody>
</table>

5. Bidders that bid for Core A are encouraged to submit bids for all the other Cores (B to D). They have the possibility to subcontract to other companies some of the tasks listed in any of the Cores. Bidders can also bid only for Cores B, C and/or D. The modules will only be undertaken if a minimum number of countries decide to take part: 10 countries for the usual modules under Core A; 8 for the new modules corresponding to Cores B to D. It will thus be important for bidders to cost them separately – with a clear distinction between fixed costs for the initial 40 (main survey of Core A), 10 (usual modules of Core A) and 8 (modules of Cores B to D) countries, and marginal costs for each additional country beyond those thresholds.

6. An overview of the development and objectives of the survey is detailed below in Section 1. The statement of work, standards regarding personal data protection, schedule of deliverables, and guidelines for bidders and evaluation criteria are then described in Sections 2, 3, 4 and 5 respectively, and should form the basis of bidders’ tender applications.

1.2. Section 1: Overview of TALIS and project design of TALIS 2024

7. This section sets out the main principles of the TALIS programme as well as the main features of the design of the project. The broad design parameters (guiding principles, target population, sampling design, survey operations and management structure) that have guided the TALIS survey since its first cycle in 2008 will be maintained in TALIS 2024. These are discussed in detail later in this section.

8. The cornerstone of TALIS remains international collaboration, and the role of the Contractor in ensuring the active engagement of all international and national stakeholders is central to the success of TALIS.

1.2.1. Project background

9. The OECD Teaching and Learning International Survey (TALIS) has been developed within the OECD’s indicators of education systems (INES) programme. The INES programme has, over the past 30 years or so, made considerable progress in developing statistics and indicators which assist policy makers and others to assess the performance and features of education systems, the results of which are published...
annually in Education at a Glance. The Programme for International Student Assessment (PISA) also grew from the INES programme.

10. Providing information on teachers, teaching and learning is an essential component of the INES programme. The importance of teachers, including the need for better information on the quality of learning and how teaching influences learning has led to a data strategy, which seeks to increase the international information available to OECD countries on teachers, teaching, and the impact that teachers can have on student learning. One component of this strategy developed into the Teaching and Learning International Survey (TALIS).

11. TALIS is the first international survey to focus on the working conditions of teachers and the learning environment in schools. Its overall aim is to help countries to review and develop policies that foster the conditions for effective schooling. The policy rationale for the survey has been developed in the context of the existing knowledge base and recognised information gaps. Policies impacting on teachers and teaching vary substantially across countries and regions. The international nature of the survey allows for international benchmarking of teacher characteristics. It extends and complements the system-level benchmarking of characteristics such as statutory wages and teaching time currently provided in Education at a Glance.

12. The first cycle of TALIS (TALIS 2008) was carried out in 17 OECD countries and 7 partner countries and economies in the 2007/08 school year. The initial international results were released in June 2009. The second cycle of TALIS (TALIS 2013) was carried out in 24 OECD countries and 10 partner countries and economies in the 2012/13 school year. The initial international results were released in June 2014. In 2014, 1 OECD country and 3 partner countries took part in a “delayed” version of TALIS 2013. The results were integrated into the TALIS 2013 database in 2015. The third cycle of TALIS (TALIS 2018) was carried out in 31 OECD countries and 17 partner countries and economies. The international results were released in two batches with Volume I data in June 2019 and Volume II data in March 2020.

13. Through a survey of teachers and school principals, TALIS investigates the learning environment and working conditions of schools and provides a barometer of teachers, teaching and learning environments in participating countries and economies. In each system, a representative sample of approximately 200 schools and 20 teachers within each school (along with their school principal) is randomly selected. The chosen target population of the first cycle of TALIS was teachers of lower secondary education (level 2 of ISCED 2011) and their school principals. In TALIS 2013 and 2018, countries were given the possibility to also implement the survey in primary and upper secondary schools (ISCED levels 1 and 3) and to implement the survey in schools that had been sampled in PISA 2012 and 2018 respectively.

14. The survey development and implementation include three phases: i) a pilot in which countries’ participation is voluntary; ii) a field trial in which all countries are requested to participate; and iii) the actual main survey. Survey instruments and operations will be developed, reviewed and revised in an iterative process at each phase of the survey.

15. The 2018 cycle of TALIS provided policy-relevant data and analysis on the following key aspects of schooling:\(^1\)

- human resource issues and stakeholder relations
- school leadership
- school climate

\(^1\) For more information, please see TALIS 2018 Conceptual Framework (Ainley and Carstens, 2018[7]).
• teacher education and initial preparation
• teacher job satisfaction and motivation
• teacher feedback and development
• teacher self-efficacy
• teachers’ instructional practices
• teachers’ professional practices
• innovation
• equity and diversity

16. The TALIS 2008, 2013 and 2018 publications (including the instruments and technical reports) and fully documented international databases can be downloaded from the TALIS website: www.oecd.org/education/talis.

**TALIS Starting Strong Survey**

17. Following decision by the Education Policy Committee (EDPC), the TALIS Starting Strong Survey is now formally embedded under the TALIS umbrella as a new module. TALIS Starting Strong is an international survey of centre staff and leaders in the Early Childhood Education and Care (ECEC) sector that collects data on learning and well-being environments, the work that staff and centre leaders carry out with children in ECEC settings, how staff are prepared for and trained within the profession, and what motivates staff to join the ECEC profession. The first cycle of the survey, carried out in 2018, offered participating countries the possibility of conducting the survey in two populations of interest in the ECEC sector: ECEC settings usually catering for children from age 3 through to the time they enter primary education (pre-primary education, ISCED 02); and ECEC settings for children under age 3. Nine countries participated in the survey at ISCED level 02, and four of these countries also administered the survey for staff and leaders working with children under age 3.


**The optional survey of novice teachers**

19. During its 6th meeting in Antwerp (Belgium) on 7 and 8 November 2019, the TALIS Governing Board (TGB) supported the idea of developing a first-of-its-kind international survey of novice teachers as an option of TALIS 2024. This idea comes from the increasing awareness, from research studies, of the importance of the first few years of a teacher’s experience for many key outcomes: teaching quality, student achievement, teachers’ job satisfaction and retention, among other dimensions. Past OECD TALIS reports have paid attention to novice teachers, by describing the extent to which their pre-service and in-service training, their working conditions, practices and opinions about their jobs deviate from those of more experienced teachers. Yet, TALIS-based evidence on these issues have reached the limits induced by TALIS sample size and design. First, low counts of novice teachers in country samples lead to the use of a broad definition of novice teachers, i.e. to treat them as a single rough group of teachers with up to five years of experience. Second, the cross-sectional nature of TALIS data only provides a static description of these teachers’ aggregate and fails to capture the important changes experienced by teachers when they start their job. In 2024, countries will thus be offered the possibility of conducting an optional survey of
novice teachers that will include a strong time dimension with the view of measuring how novice teachers change and grow over their first career years.

20. The objective of this optional survey is to identify the specific working conditions, professional practices, induction activities, and pre-service and in-service training that drive new teachers’ skills formation, self-efficacy, job satisfaction and well-being over time. The first five years of a teacher’s career are considered an appropriate time period to study changes experienced by teachers. Past research found that the learning curve of new teachers appears to be quite steep in the first year or two (Rivkin, Hanushek and Kain, 2005[1]; Rockoff, 2004[2]), with some evidence of continuous gain until up to five years (Harris and Sass, 2011[3]; Rivkin, Hanushek and Kain, 2005[1]) but weaker evidence for the subsequent years. The chosen time period would also allow for analysing early drop-out patterns, which are particularly problematic from the viewpoint of sustainable initial teacher education systems. It will be important to accurately and repeatedly ask teachers about their job characteristics and opinions about their jobs over time, in order to measure changes over the first few years of their career.

21. The OECD’s initial proposal is to focus on the first few years of teaching with the goal of analysing how teachers grow in these first years. Participating countries would benefit from understanding how their novice teachers grow in their job vis-à-vis novice teachers from other countries. Countries would also benefit from learning what other countries are doing to develop their novice teachers effectively. For instance, this module will shed light on how certain support mechanisms help enhance teachers’ self-efficacy, job satisfaction and retention or how novice teachers’ professional development needs change over time.

22. Such analyses could be done by oversampling and then comparing groups of teachers with various lengths of teaching experience (e.g. 1-2 years; 3-4 years) and/or by following one or two cohorts of teachers in a specific career year (e.g. 1st year and/or 3rd year) over time (e.g. one and/or two years later). The former is henceforth referred to as the “cross-sectional scenario”, the latter as the “longitudinal scenario”. Bidders are invited to make concrete proposals for both scenarios, specify the design features (e.g. target populations, sample size, number and timing of follow-ups as applicable), and discuss operational challenges and analytical potential and limits of both scenarios. They are also asked to cost the two scenarios separately.

**Teacher Knowledge Survey**

23. Following decision by the Governing Board of the Centre for Education Research and Innovation (CERI), the Teacher Knowledge Survey is now formally part of TALIS as a new module. The Teacher Knowledge Survey (TKS) was developed to explore the characteristics of teaching as a knowledge profession in the 21st century. The TKS aims to contribute to better understanding the nature of teachers’ pedagogical knowledge and professional competence to improve teacher policies. It can inform policy makers on:

- whether teachers (including new teachers) are sufficiently prepared for 21st century teaching, for example teaching diverse classrooms or using modern pedagogical approaches
- the strengths and weaknesses of teachers’ current general pedagogical knowledge base
- the ways in which teacher education – both initial education and continuing professional development – can be improved to ensure a robust knowledge base in the profession in line with national policy priorities.

24. The Teacher Knowledge Survey assessment module builds on the work done by CERI and is designed to complement the TALIS survey. By providing an assessment of teachers’ pedagogical knowledge, it goes beyond self-reporting. This reduces the risk of social desirability bias in self-reported responses, and also allows for triangulation of the Teacher Knowledge Survey assessment data with other
response types (e.g. self-report and/or situational judgements etc.). At the same time, it does not individually assess teachers nor does it rank countries, instead positioning itself as a useful research and policy tool for improving each individual system, taking account of its policy priorities and teaching context.

25. The TKS assessment module can be administered to ISCED 2 teachers, with the possibility to also administer it to novice teachers. Extending the analysis to this additional group allows for gaining insight into the evolution of knowledge and interaction between components of professionalism throughout the career. (See http://www.oecd.org/education/eri/teacher-knowledge-survey-background.htm and the TKS background document for more details on the background and survey design.)

1.2.2. Survey objectives and guiding principles

26. In its work on education, the OECD is committed to assist Member countries in improving the effectiveness, efficiency, quality, inclusiveness and equity of education systems. The strategic ambition of the OECD’s education work is to provide international comparative data and analysis as well as policy advice based on evidence and international best practices to improve the effectiveness, efficiency, quality, inclusiveness and equity of education systems. The overall goal of TALIS is to fill key international and national data gaps on teachers, their professional development, teaching, the learning environment and the impact that teachers can have on students. The general long-term purpose of the TALIS programme is to provide comparative data and analysis to help with the development of teaching as a profession, aimed at supporting the learning of students. In seeking to attain this goal, certain guiding principles must underpin any development of the TALIS programme. The guiding principles that have shaped the development of TALIS to date are:

- **Policy relevance.** The need to be clear about the policy issues and questions it is intended to address; should focus on those that are most relevant for OECD countries.
- **Value-added.** The international comparative aspects should provide significant benefit to the undertaking.
- **Indicator-oriented.** The strategy should yield information that can be used to develop indicators.
- **Validity, reliability, comparability and rigour.** The strategy should yield information that will be valid, comparable, and reliable across OECD countries and based on rigorous review of the existing knowledge base.
- **Interpretability.** The strategy should yield results that can be meaningfully interpreted across OECD countries.
- **Efficiency and cost-effectiveness.** The strategy should be able to be carried out in a timely and resource-conscious fashion.

27. In addition to the principles described above, data protection and confidentiality are essential, and bidders should describe how this will be assured. Contractors will be required to comply as a minimum with data privacy principles which are practiced by the OECD, but must also comply with the national requirements of participating countries and economies, especially in the light of recent changes in the legislation on data protection in a number of TALIS participating countries.

28. The objectives of TALIS are, therefore, to provide policy relevant, robust international indicators and analysis on teachers and teaching in a timely and cost effective manner. The survey aims to provide

---

2 Available with the key background documents for bidders in the download section of the call for tenders.

indicators and analysis which have implications for policies ranging from teacher labour market policies to school effectiveness. In that sense, it is much broader and more complex than a survey simply examining human resource issues.

1.2.3. General structure of TALIS 2024 survey

29. As with previous cycles of TALIS, the TALIS 2024 survey will be developed based on a research-informed conceptual framework and will consist of two main survey questionnaires, one for teachers and one for school principals. Previous versions and development of the TALIS 2018 conceptual framework and questionnaires will inform the development process of the TALIS 2024 main survey instruments.

30. The TALIS main survey will target the ISCED 2 level of education. Countries will also be given the possibility to survey other populations.

31. The populations to be considered include:

- ISCED 1 teachers and school principals
- ISCED 3 teachers and school principals
- Teachers and principals in the schools administering PISA 2024
- Staff and centre leaders of Early Childhood Education and Care (ECEC) settings (including ECEC centres and home-based settings)
- (Over)samples of novice teachers at ISCED 2 level in their first years of teaching – with either cross-sectional comparisons of these groups or the longitudinal follow-up of the same cohort of starting teachers.

32. The main survey questionnaires may be adapted for administration as part of the ISCED 1, ISCED 3 and the TALIS-PISA link modules (see more information in Task A3 of Core A). Specific questionnaires will need to be developed for the ISCED 0 module, based on the former versions of the staff and centre leaders questionnaires included in TALIS Starting Strong (see more information in Core B). The novice teachers module will require developing new questionnaire content covering issues that are particularly relevant to this teacher population (see more information in Core C). An assessment module including a questionnaire and an assessment of general pedagogical knowledge will need to be developed on the basis of the current version of the Teacher Knowledge Survey (see more information in Core D).

33. Table 2 below summarises the general structure of the TALIS 2024 programme, with regards to the various target populations and survey instruments.

<table>
<thead>
<tr>
<th>Populations</th>
<th>Survey instruments</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISCED 2 (main survey)</td>
<td>Teacher and Principal Questionnaires</td>
</tr>
<tr>
<td></td>
<td>Teacher Knowledge Survey assessment module (optional)</td>
</tr>
<tr>
<td>ISCED 1 (module)</td>
<td>Teacher and Principal Questionnaires</td>
</tr>
<tr>
<td>ISCED 3 (module)</td>
<td>Teacher and Principal Questionnaires</td>
</tr>
<tr>
<td>PISA schools (module)</td>
<td>Teacher and Principal Questionnaires</td>
</tr>
<tr>
<td>ISCED 0 (module)</td>
<td>Staff and Leader Questionnaires (possibly Combined Questionnaire)</td>
</tr>
<tr>
<td>Novice teachers at ISCED level 2 (module)</td>
<td>Adapted versions of the Teacher Questionnaire</td>
</tr>
<tr>
<td></td>
<td>Short Former Teacher Questionnaire (in the longitudinal scenario)</td>
</tr>
<tr>
<td></td>
<td>Teacher Knowledge Survey assessment module (optional)</td>
</tr>
</tbody>
</table>

34. The development and implementation of all these survey components shall require the same high-level technical, analytical and managerial rigor and expertise as for the main survey.
35. The international modules for additional levels of education will need to draw upon the 2011 edition of ISCED to distinguish teachers, principals and staff across levels.

36. The TALIS-PISA link module provides countries with the option to sample teachers in PISA 2024 schools and will require co-ordination of the bidders with the PISA contractors for sampling.

37. Countries will also be given the possibility to survey staff and centre leaders of Early Childhood Education and Care (ECEC) settings. This covers pre-primary staff and centre leaders (ISCED 2), and optionally, staff and centre leaders working with children under age 3.

38. The international module for surveying novice teachers could consist of: (i) a cross-sectional comparison of groups of novice teachers with different lengths of teaching experience (possibly by oversampling them in the main ISCED 2 survey); or (ii) a longitudinal follow up on key indicators of novice teachers. Bidders are invited to make concrete proposals for the features of each scenario, to discuss the pros and cons of each scenario and to cost them separately.

39. The Teacher Knowledge Survey assessment module in TALIS consists of administering additional survey instruments to the main ISCED 2 survey and, for interested countries, novice teachers.

1.2.4. Key survey deliverables

40. In general terms, TALIS 2024 will deliver the following products which, collectively, seek to assist countries in the development of education policies in the domain of teachers, teaching, and learning:

Survey database and indicators

41. As with the previous cycles of TALIS, fully documented international databases of teacher and school principal responses covering the main survey and all modules, together with the survey weights to allow published estimates to be reproduced and original analyses to be conducted, will be made available free of charge on the web, possibly in several batches depending on the reporting plan for TALIS 2024. To allow for trend analysis, the TALIS 2024 databases will need to be compatible and consistent with earlier TALIS databases in terms of format, variable labels, etc.

42. TALIS 2024 will provide indicators of four types (that are not mutually exclusive but often go together):

- **Indicators of the characteristics of teachers, principals and schools:** providing a description of the teaching force and the schools they work in
- **Policy-focused indicators:** relevant to the chosen policy questions, themes and indicator foci of the survey, guided by the participating countries through a prioritisation process
- **Practitioner-focused indicators:** relevant to teachers and school principals alike to inform their school and their own continuous improvement
- **Trend indicators:** relevant to the chosen indicators repeated from the first three cycles of the survey.

Reports

43. Separate sets of reports will be produced using the TALIS 2024 data:

- Reports produced under the responsibility of the Contractor (as with previous cycles):
  - A technical report documenting the methods and procedures used in developing and implementing TALIS 2024.
  - A user guide providing detailed information on how to analyse the TALIS data (including across cycles, populations and ISCED levels and with PISA data through the TALIS-PISA link), enabling researchers to
both *reproduce* the initial results and to undertake further analyses. In addition to the inclusion of the necessary techniques, the user guide will also include a detailed account of the TALIS database and examples providing full syntax in two different software packages (e.g. in SPSS and Stata). This will encourage further use of the TALIS data by researchers.

- Reports produced under the responsibility of the OECD:
  - A series of international reports to be delivered at the launch of the TALIS 2024 cycle in 2025 and the period immediately following in a staggered manner. They would include the main ISCED 2 report and individual reports on the module results (ISCED 1, ISCED 3, TALIS-PISA link, ISCED 0 (TALIS Starting Strong), novice teachers and Teacher Knowledge Survey modules).
  - A series of thematic reports building on the analysis presented in the general report to be released in the year(s) after the initial launch. These would include more in-depth analysis of indicators and variables and draw on differences in institutional settings and public policies in discussions of variations identified in the data across countries.
  - A teacher’s guide to the ISCED 2 report and regular *Teaching in Focus policy briefs* and accompanying blog posts on the OECD Education blog will provide additional ways for countries to look at and distribute the TALIS data and analyses, with the aims of raising awareness about TALIS and disseminating its findings.

**Conceptual framework and survey instruments**

Content focus of TALIS 2024

44. The general themes and indicators for TALIS 2018 were guided by participating countries through a priority-rating exercise. A conceptual framework was then developed by subject-matter experts, the international research consortium and the OECD Secretariat and was approved by TALIS participating countries and economies. The purpose of this conceptual framework is to steer the development of the TALIS instruments and serve as a guide for future TALIS cycles.

45. For TALIS 2018, the conceptual framework presented a number of research questions to guide instrument development. The main TALIS 2018 themes comprised:

- human resource issues and stakeholder relations
- school leadership, including indicators on distributed or team leadership
- teacher training, including professional development and initial teacher education, induction and mentoring
- appraisal of and feedback to teachers
- school climate, including disciplinary climate and student-teacher relations as well as indicators on the relations between parents, schools and teachers
- innovative teaching practices including integration of ICT in teaching practices and fostering innovative educational outcomes such as creativity and critical thinking and school climate for innovativeness
- new indicators on teachers’ capacity to respond to students cultural backgrounds and school practices in relation to equity and diversity

---

4 Available with the key background documents for bidders in the download section of the call for tenders.
• teachers’ pedagogical beliefs, attitudes and their professional and instructional practices, including indicators on the profile of student assessment practices and on teachers’ working time
• teachers’ job satisfaction and feelings of self-efficacy.

46. For the TALIS 2024 cycle, prior to the development of the conceptual framework, the contractor shall develop a concept paper:
• describing the vision for the framework, informed by a targeted literature review on what is effective teaching, as well as a forward-looking analysis of what the future of teaching entails and what are the key policy issues and challenges emerging across countries
• identifying areas of improvement for current indicators
• proposing directions for the conceptual coverage of TALIS 2024.

47. The directions set out in the concept paper shall be validated by external stakeholders such as subject-matter experts, education foresight experts, TALIS participating countries and economies, and the OECD Secretariat.

48. Bidders are invited to propose updates to the questionnaire items measuring teaching practices, professional development and special needs education (see more information in Section 2).

49. With regard to additional modules, bidders are invited to make proposals for:
• Identifying areas for improvement and introducing new content into the survey of staff members and leaders of ECEC settings (ISCED 0 module).
• Developing new content for examining the experience of novice teachers, with a view to measuring how teachers change and grow over their early career years: changes in teachers’ practices, working conditions, patterns of teacher retention and drop-out, and the influence of induction, pre-service and in-service teacher training on teachers’ self-efficacy and job satisfaction.
• Developing an optional assessment module measuring teachers’ pedagogical knowledge and how it relates to their initial education and in-service professional development. The assessment module shall be informed by the Teacher Knowledge Survey developed in CERI5 and the Teacher Education and Development Study in Mathematics (TEDS-M). Countries will have the option to administer the TKS assessment module to novice teachers.

50. As in the course of the development of the first three cycles of TALIS, the focus of the survey will be determined by participating countries. Bidders should outline their proposed process to build collective agreement on the survey content in a way that achieves a balance of trends and innovation. The concept paper described above should inform this prioritisation.

Conceptual framework

51. The goals and priorities for the development of all questionnaires (main survey and modules) will be guided by participating countries and informed by the concept paper prepared by the Contractor with input from multiple stakeholders.

52. It will then be the responsibility of the Questionnaire Expert Group (QEG) to translate these goals into the conceptual framework for the main survey and the usual modules (ISCED 1, ISCED3, TALIS-PISA link) as well as for the new module on novice teachers. The QEG will be established by the Contractor of Core A. The development of conceptual frameworks for the ISCED 0 and the TKS assessment modules

will be overseen by the Contractors of Cores B and D, respectively, and will require inputs from the QEG managed by Core A Contractor, as well as inputs from additional experts recruited by the Contractors of Cores B and D, respectively.

Instrument development

53. The TALIS 2024 main survey will be targeted at teachers and school principals working at the ISCED 2 level of education.

54. Adaptations to the questionnaires of the main survey may be needed for some of the other target populations (ISCED 1, ISCED 3, TALIS-PISA link), although it is expected that there would be an overlap in the themes and indicators to allow for analyses across levels. Questionnaires for TALIS Starting Strong and the module of novice teachers, as well as the Teacher Knowledge Survey assessment module need to be developed separately as Cores B, C and D of this call.

55. As TALIS 2018 has reached the limits of the topics that can be covered with the current design and within the target response time of 45 minutes the introduction of a split-questionnaire design should be proposed. The design should aim to keep the trend items (equivalent to about 1/3 of total questionnaire) unchanged, and propose evolution for about 1/3 of the items and development of new items for about 1/3 of the questionnaire. The trend items will be selected in discussion with the OECD Secretariat and participating countries through the TALIS Governing Board. Bidders are invited to discuss pros and cons for the introduction of a split-questionnaire design, in comparison to a single complete questionnaire.

56. Survey instruments will be developed for the pilot and then reviewed and revised in an iterative process based on new evidence and considerations for the field trial and then for the main survey.

57. Bidders are invited to describe actions that will be taken prior to the pilot and or throughout the process to ensure translatability of the source(s) version of the questionnaire into other languages (e.g. translatability assessment). The main purposes of the pilot phase are to: i) trial new questionnaire items and new item formats (e.g. situational judgment items or anchoring vignettes); ii) collect information on the international applicability and equivalence of the items and targeted constructs; and iii) fine-tune the questionnaires for the field trial based on analysis of the pilot outcomes.

58. In TALIS 2018, these goals were achieved by implementing a qualitative methodology (i.e. focus groups of teachers and school principals) rather than a quantitative methodology (i.e. administering the questionnaires to a larger group of teachers and school principals). Twenty-one countries volunteered to participate in the pilot. More details about the pilot used in TALIS 2018 can be found in the TALIS 2018 Technical Report. The 2024 pilot study will need to be administered in the language of the participants (not in English to bilingual teachers and school leaders). It could also be expanded for example to ensuring measurement invariance by, for example, translating the new items to as many languages as possible, applying the pilot in as many participating countries as possible and performing an in-depth analysis of the feedback collected from the focus groups. The bidders are invited to propose a strategy to maximise information gains while balancing burden, cost and analysis capacity considerations.

59. The objective of the field trial is twofold: i) to test the survey instruments in all national versions, and collect evidence about their validity, reliability and comparability and other measurement properties in order to inform the selection of instruments and reporting plans; and to compare alternative instruments targeting the same constructs; and ii) to try out the operational procedures in all participating countries in preparation for the main study.

60. The field trial is mandatory for all participating countries and economies and helps ensure that the main study can be implemented successfully and will yield meaningful results. For TALIS 2018, the field

---

6 Available with the key background documents for bidders in the download section of the call for tenders.
trial sample size per country and option was 600 teachers and 30 principals from 30 schools. For TALIS Starting Strong 2018, the minimum field trial sample size per country and population of interest was set at 30 sampled ECEC centres and eight staff members per centre. The Contractor will need to consider whether to revise these parameters, should a split-questionnaire design be adopted for TALIS 2024 or TALIS Starting Strong 2024. More information about the field trial methodology used to date can be found in the TALIS 2018 Technical Report and in the TALIS Starting Strong 2018 Technical Report.⁷

61. The main study represents the core data collection period for the project. It will use the instruments developed and revised in the previous pilot and field trial phases and will be implemented according to the guidelines and technical standards agreed by the TALIS Governing Board.

62. TALIS 2024 instruments should be designed for computer-based administration, to benefit from all the functionalities offered by this administration mode (e.g. coherence checks, filter management, rotation of question order). Bidders are invited to discuss how the functionalities of computer-based administration could be exploited for the instrument design. They should also consider keeping a mixed-mode approach and developing a differentiated questionnaire design depending on the administration mode, in case a few countries are not able to administer the survey online to the whole or part of the surveyed populations.

1.2.5. Key sampling features

63. There will be between one and six target populations for the survey (depending on country interest):

- Main survey: ISCED level 2 teachers and school principals.
- Usual module: Primary school (ISCED level 1) teachers and school principals.
- Usual module: Upper secondary (ISCED level 3) teachers and school principals.
- Usual module: Additional sample of teachers of 15-year-old students and school principals in PISA 2024 schools.
- Additional module: ISCED 0 staff and centre leaders, which covers pre-primary staff and centre leaders (ISCED 02), and optionally, staff and centre leaders working with children under age 3.
- New additional module: Novice teachers in their first years of teaching with the possibility of a longitudinal follow up (ideally) or cross-sectional comparison with cohorts of novice teachers in different career years.

64. The target populations of the main survey and of the ISCED 1, ISCED 3, TALIS-PISA link and novice teachers’ modules are classroom teachers as defined in INES data collections. The formal definition of a classroom teacher is a person whose professional activity involves the planning, organising and conducting of group activities whereby students’ knowledge, skills and attitudes develop as stipulated by educational programmes. In short, it is one whose main activity is teaching.⁸ In case of the novice teachers’ sample, bidders are invited to describe how this population (and the notion of “year of service”) could be defined and what survey operations will be needed to sample those (e.g. through the collection of teachers’ experience as part of a teacher sampling list). A sampling framework that takes into account the smaller

⁷ Available with the key background documents for bidders in the download section of the call for tenders.

⁸ As with the previous cycles of TALIS, it is proposed that teachers be excluded in exclusively special needs education schools from this survey in order to reduce the complexity of sampling procedures and to enhance comparability across countries. However, teachers of students with special needs in regular schools would be included in the survey, as in TALIS 2018.
population size and the less consistent distribution of this subgroup across schools will need to be developed. While TALIS defines who is considered a teacher, there is no established definition of school principals across countries. To increase cross-country comparability of principal populations, bidders are invited to reflect on a common definition, taking into account that a new definition could break trends for principals’ reports.

65. It is the objective of the survey to obtain a representative sample of each of these target populations (main survey sample and optional modules). A sampling framework is required that will deliver representative samples of the six populations. Samples must be designed to maximise sampling efficiency for teacher-level estimates (or staff-level estimates). However, they should also:

- permit the linkage of teacher data with school-level (or centre-level) variables that are collected through the principal (or centre leader) questionnaire
- in the case of the TALIS-PISA link module, permit the linkage of teacher data with the school-level variables collected by PISA
- allow comparability across the different TALIS cycles for the core trend indicators
- allow comparability across the 2018 and 2024 TALIS Starting Strong cycles for the core trend indicators.

66. The sampling design and methodology for TALIS 2018 can be found in the TALIS 2018 field trial and main study sampling manuals and the TALIS 2018 Technical Report.

67. The defined target population must yield sufficient data and indicators for policy makers at the classroom, school and system levels. The sample must be sufficiently broad so that labour market and system-wide indicators can be inferred and used for policy analysis but also contain the necessary detail so that school-level data and indicators would facilitate policy discussion. This is required for both the school principal and teacher questionnaires and for each target population (acknowledging that adaptations might be needed for the novice teacher population).

68. As in previous TALIS cycles, the sampling frame will need to be as close as possible to the international desired target population. That is, the sampling frame should only differ from the general school population to the extent that specific and limited exclusions allow.

69. Required sample sizes need to be determined in order to meet the analytical requirements of the survey. This is required for each of the target populations (taking into account the survey instruments to be administered). The Contractor will have to identify the best method (including identifying the appropriate sampling framework with required sample parameters) for ensuring a representative and unbiased sample of each target population, taking into account the implications of the proposed split-questionnaire design on sample size, should it be adopted. An effective sample shall be created of each target population that is representative of teachers and permits the analytical objectives of the project. This also requires participation rates to be set that provide an effective sample size for reliable estimates and commensurate analysis.

---

9 It should be noted that there is no delineation between general and vocational teachers in the sampling of ISCED level 3 teachers. However, for some countries, the sampling frame may be altered to reflect these differences.

10 All three available with the key background documents for bidders in the download section of the call for tenders.
70. As for the previous cycles of TALIS, the sampling plan for the TALIS 2024 main survey at ISCED 2 and usual modules (ISCED 1, ISCED 3 and TALIS-PISA link) will likely use a nominal stratified two-stage probabilistic sample, sampling first a representative sample of schools (and their principals) and second, a representative sample of teachers in those schools. For more information about the sampling design of TALIS 2018 see the TALIS 2018 field trial and main study sampling manuals and the TALIS 2018 Technical Report.11

71. In the first three cycles of TALIS the sample sizes were conservative based on an estimated intra-class correlation of 0.30 (i.e. 200 schools per ISCED level, and for those countries implementing the TALIS-PISA link, 150 schools from the PISA 2018 sample). However for most indicators the ICC is lower, which might make it possible to use smaller samples of schools to obtain reliable estimates. Bidders are invited to reflect on whether decreasing the sample size for countries implementing only the ISCED 2 main survey and usual modules (ISCED 1, ISCED 3 and TALIS-PISA link) would be possible or how the current sample size can be better exploited using a split-questionnaire design and on potential implications on trend indicators.

72. The two-stage sampling procedure selects a representative sample of schools and a representative sample of teachers in those schools. For the main survey and the international modules, a two-stage sampling procedure would therefore select:

- A representative sample of schools
  - Offering ISCED level 2 programmes for the ISCED 2 main survey.
  - For countries implementing the ISCED 1 and/or 3 modules, a representative sample of schools offering programmes at the corresponding ISCED level.
  - For countries implementing the school-level TALIS-PISA link modules, a sample of schools from the PISA 2024 sample will also be used. Close co-ordination with the PISA sampling contractor (or the sampling can be done by the PISA contractor for this specific sample) will be required to ensure that the TALIS-PISA link sample will be drawn from among schools that actually agreed to participate in PISA (i.e. after replacement), in order to avoid data losses resulting from non-participation in PISA.

- A representative sample of teachers who teach the corresponding ISCED level programmes (ISCED 2 for the main survey, and ISCED 1 and 3 for the corresponding optional modules).

- In countries implementing the TALIS-PISA link module, a representative sample of teachers eligible to teach 15-year-olds will be drawn from the schools sampled for PISA 2024.

- For the countries implementing the option for novice teachers in their first years of service, a representative sample of these teachers. Bidders are invited to discuss the relative merits of a cross-sectional approach contrasting different cohorts of teachers, versus a longitudinal approach following a cohort of new teachers in their first years of teaching. Bidders should also discuss the analytical, sampling, operational and cost implications of each design.

- For countries implementing the ISCED 0 module, a two-stage sampling procedure selects a representative sample in each participating country of staff and leaders providing ECEC for (a) ISCED level 02 children, and (b) children under the age of 3 in participating countries. TALIS Starting Strong 2018 defined staff members as all persons working regularly in a pedagogical manner with ISCED level 02 children or children under the age of 3 within institutional (officially registered) settings providing early education and care. These settings could be home-based (within the rooms of the respective staff)

11 All three available with the key background documents for bidders in the download section of the call for tenders.
or centre-based (within rooms specifically dedicated to ECEC). The sampling design and methodology for the ISCED 0 module can be found in the 2018 TALIS Starting Strong Technical Report.12

- For countries implementing the TKS assessment module, the teacher sample is the same as for the ISCED 2 main survey, and the novice teachers sample is the same as for the novice teachers’ module. However, for countries administering this module, consideration should be given to expected response rates to determine the target sample size.

73. Bidders may provide sampling plans somewhat different from the outlines provided in this document if it is considered to be more effective at meeting the objectives of the surveys. Bidders must provide clear justifications for their proposed sampling plans.

1.2.6. TALIS technical standards

74. The strict adherence to strong technical standards ensures that the survey is carried out with a high degree of uniformity in all participating countries and economies, so that TALIS results can be compared across countries. It is thus of utmost importance to the overall high-quality of the survey.

75. The technical standards for the implementation of TALIS specify the quality requirements in terms of survey ethics and planning, communication, sampling, instrument translation and translation verification, survey administration, quality monitoring, data entry and submission, data confidentiality and security, data analysis and reporting. The technical standards are reviewed periodically by the OECD and the TALIS Governing Board and improvements can be made with countries’ approval. In TALIS 2024, the Contractor will be responsible for leading the review and updating of the technical standards, based on the recommendations from the TALIS 2018 Technical Advisory Group and lessons learnt from the TALIS 2018 cycle. The TALIS 2018 technical standards are available in the download section of the call for tenders. Bidders are invited to suggest changes to and expansions of the current Technical Standards in relation to the new modules. They are also invited to specifically consider including new standards regarding the engagement strategies and incentives that national centres can use and cannot use to secure participation in the survey.

1.2.7. Country participation

76. At the time of launching this Call for Tender, it is expected that the vast majority of the 48 TALIS 2018 participating countries and economies will remain involved in the 2024 round of TALIS, and new participants are expected to join this survey. It is thus possible that a larger number of countries will take part in TALIS 2024 compared to the previous cycle.

77. Countries participation will differ between involvement in the main survey that includes the main survey samples of ISCED level 2 teachers and school leaders, participation in the usual modules (ISCED level 1, ISCED level 3 and TALIS-PISA link), and participation in the additional modules (ISCED 0, novice teachers, TKS assessment module).

78. Given that not all modules may go forward, bidders are invited to provide detailed costings for each Core, broken down into fixed costs for the initial 10 (Core A), the initial 8 (Cores B to D) countries/economies, and marginal costs for each additional country/economy beyond those thresholds.

---

12 Available in the download section of the call for tenders.
Participating countries have three main roles in the project: (1) As members of the TGB, they will determine the policy objectives, and broad design parameters for TALIS; (2) Through experts represented in the expert groups, they will contribute to the development of the framework and instruments under the governance and auspices of the Contractor; and (3) Through National Project Managers, they will implement the project at the national level, subject to the agreed-upon administrative procedures.

---

13 Such responsibilities include, for example, setting priorities on survey concept, reviewing conceptual framework and draft instruments, and providing feedback on proposed analyses and reporting.
The TALIS Governing Board (TGB)

88. Each country or economy that participates in the survey through the OECD is represented on the TGB. In consultation with the OECD Secretariat, the TGB:

- establishes the specific priorities for indicators, analysis and instrument development in accordance with the policy objectives of the survey
- works with the OECD Secretariat to ensure compliance with the policy objectives and design parameters at milestones during the implementation of the project
- insofar as the survey implementation is covered nearly entirely by country contributions, draws up the budget and recommends budgetary allocations for participants
- defines the scope of the work to be covered by the Contractor
- guides the preparation, review and completion of all reports and analysis of the survey results
- consults with the Education Policy Committee (EDPC) and the Centre for Education Research and Innovation (CERI) in the development of the survey and brings analysis of the survey results, reports and policy advice to their attention.

89. In addition to enabling participating countries to share substantively with one another the programme’s decision-making and policy direction, the TGB enables participating countries to be fully informed of all aspects of TALIS’ implementation. It is envisaged that approximately two TGB meetings will be held each year to ensure the effective operation of the survey, and that the Contractor will report on progress at each of these meetings.

National Project Managers (NPMs)

90. Participating countries shall appoint National Project Managers (NPMs) to implement the survey in their country. NPMs are the primary means of day-to-day contact between participating countries and the Contractor for the implementation of the survey and shall interact with and report to the Contractor on all issues related to the implementation of the survey in their country. NPMs play a vital role in ensuring that TALIS is a high-quality project with results that can be verified and evaluated. They can also play an important role in the development and review of TALIS reports and publications, in consultation with their respective TGB member.

91. The Contractor shall provide a detailed job profile for NPMs to assist participating countries in their appointment. The TALIS 2018 profile and role of NPMs is available on the TALIS tender website. At the national level, each country must decide how it can best facilitate the communication and co-ordination needed for implementing the national data collection responsibilities as well as for interacting with the Contractor.

92. A major risk in the implementation of TALIS is the possibility of deviations introduced at the national level during the course of the implementation. Seemingly unimportant decisions, taken alone or in combination, can undermine the integrity of the entire survey in a particular country. The Contractor shall seek an open and collegial process with the NPMs that stresses the role that key design parameters shall play in assuring final quality. The strict adherence to TALIS technical standards ensures that the survey is carried out with a high degree of uniformity in all participating countries and economies. The Contractor will also produce detailed manuals, documentation and guidelines for NPMs and other national centre staff (for example, the national data manager and/or national sampling manager) to guide them in

---

14 Available with the key background documents for bidders in the download section of the call for tenders.
the implementation of the different phases of the study. The TALIS 2018 NPM and survey operations manuals for the pilot study, field trial and main study are available on the TALIS tender website for bidders.\footnote{Available with the key background documents for bidders in the download section of the call for tenders.}

93. The number of meetings for NPMs to attend each year will be determined by the Contractor in discussion with the TGB. This number may differ over years, particularly during the development stage to ensure consistency and that adequate training is provided. As a general guideline, in TALIS 2018, there were four NPM meetings throughout the duration of the project and one NPM workshop, each lasting between three and five days.

94. Considering the specific roles of NPMs, the activities which are under the responsibility of individual countries are as follows:

- provide input for questionnaire development through the TGB member
- manage translation and adaptation of the survey instruments and materials
- provide data/documentation to assist in constructing the national sampling frame
- attend NPM meetings
- co-operate with the Contractor to draw appropriate samples for all populations covered
- prepare and participate in the pilot (optional), field trial and main study phases of the project:
  - attend training sessions for NPMs
  - distribute materials to schools/ECEC centres
  - obtain school and teacher co-operation
  - recruit and liaise with co-ordinators in each school/ECEC centre
  - submit data files to the Contractor
  - co-operate in data cleaning
  - review analytic reports and (draft) publications.

The OECD Secretariat

95. The OECD Secretariat is responsible for the overall management of the project. This entails preparing the terms of reference for each survey under the guidance of participating countries, engaging international Contractor(s) to carry out the specified activities, monitoring the Contractor(s) for quality assurance purposes, and acting as liaison between the TGB and the Education Policy Committee (EDPC). The Secretariat is also responsible for building consensus among participating countries at the policy level – through the TGB – both during the preparation of the terms of references and at milestone points of the survey.

96. The OECD Secretariat acts as the Secretariat to the TGB and as the interface between the TGB and the Contractor(s) charged with the implementation during all stages of the project. It is further a responsibility of the Secretariat to provide participating countries with a progress report on a biannual basis as well as with a report on financial and contractual management on an annual basis.

97. The Secretariat produces analyses, based on the statistical components provided by the Contractor(s), and prepares the international reports and publications in collaboration with the Contractor(s) and in close consultation with participating countries both at the policy level (TGB) and at...
the level of implementation (National Project Managers). Consensus on indicators, analyses, reports and publications will be built through the TGB.

98. Participating countries and economies shall agree on a set of general rules for the inclusion/exclusion of country results in international reports. Any matter of dispute between countries and the Contractor of Core A on the application of these rules shall be arbitrated by the Secretariat with guidance from the Technical Advisory Group, the sampling referee and the translation referee, under guidelines established by participating countries.

99. Additionally, it is the OECD Secretariat’s role to participate actively during the development of all documents and reports and to oversee the documentation process of the project including approval of all documents before they are provided to participating countries. This applies, in particular, to meeting documents, manuals and survey materials.

The contractor(s)

100. The Contractor of Core A is charged with the responsibility of delivering a high quality product – namely clean and thoroughly documented datasets for each population and module covered by the survey – on time and within budget. As such, the Contractor of Core A has ultimate decision-making authority and responsibility i) for operationalising the overall project design agreed upon by the TGB; and ii) for implementing the project within the terms of reference and on time. The Contractor develops and imposes rigorous quality assurance procedures for the operation of the survey and takes decisions on implementation on a day-to-day basis. Guidance and advice is sought, as necessary, from the OECD Secretariat, the TGB and NPMs.

101. The Contractor(s) of Cores B to D are responsible for the development of survey instruments for, respectively, the ISCED 0 module, the novice teachers module and the TKS assessment module. Should they be different from the Contractor of Core A, they will collaborate with the latter to ensure the integration of their contributions in the overall project.

102. The Contractors report in the first instance to the OECD Secretariat, who acts as the main liaison with the TGB.

Questionnaire Expert Group (QEG)

103. The Contractor of Core A is responsible for establishing, chairing and overseeing the Questionnaire Expert Group (QEG), for organising and hosting meetings for the QEG, and ensuring the alignment of the policy objectives as set by the TGB and the framework and instruments.

104. It is the responsibility of the QEG to translate the project goals into the framework, questionnaires and the analysis plan. The group shall be composed of at least one member from the OECD Secretariat, a member of the sampling team, experts with expertise in the levels of education needed (1, 2 and 3), an expert drawn from the PISA QEG to help ensure synergies across surveys, experts with expertise in the main policy themes selected for TALIS 2024, experts with expertise in the focus of the additional modules (early childhood education and care, novice teachers and teacher knowledge, nominated and managed by the Contractors of Core B, C and D respectively, as applicable), as well as with experience in survey-based education policy research and instrument development in the international context. Experts of the QEG (or extended QEG for that matter) shall preferably originate from or have extensive knowledge of the diverse international contexts TALIS operates in.

105. The QEG is responsible for ensuring that the policy themes and priority indicators selected by the TGB are investigated sufficiently thoroughly to generate valuable policy insights while keeping the TALIS questionnaires to a manageable length (maximum 45 minutes to complete the English version). Particular
attention shall therefore be paid to how the themes interrelate in order to maximise the analytical value of the survey.

Sampling and translation referees

106. To ensure the integrity of national samples and translated instruments, the Contractor will propose a sampling referee and a translation and adaptation referee. The referees cannot be involved in the sampling process nor the translation/adaptation process respectively, for them not to be judge and party. The bidders are asked to put forward name(s) for potential referees in their proposals.

107. The sampling and translation referees will review the evidence prepared by the Contractor on the national processes, and in consultation with the Contractor, the Technical Advisory Group (TAG) or other experts and with the OECD Secretariat, will provide recommendations for data adjudication.

- The sampling referee will assess the quality of the samples for TALIS 2024 and the implications for the use of country results in the international and thematic reports and will make recommendations to the TGB regarding the use of individual countries’ data in the reporting process.
- The translation and adaptation referee will be available to resolve and arbitrate any disagreement between the Contractor’s team in charge of translation verification and countries arising in the course of the translation and adaptation process, and assess the quality of the translations and adaptations for the purpose of the data adjudication decisions.

Technical Advisory Group (TAG)

108. The role of the Technical Advisory Group (TAG) is to advise both the Contractor(s) and the OECD Secretariat on the operational and technical issues of TALIS, including the implications of modifications to instrument design and survey procedures, issues related to item definition and construction, issues concerning comparability, cross-cultural validity, sampling, and variance estimation for reporting. The TAG shall also be consulted on issues surrounding methodological advances and issues related to reporting and the dissemination of data products and online analysis systems.

109. The TAG is managed by the OECD Secretariat. The members of the group are appointed by the OECD Secretariat in consultation with the TGB. Some of the membership of the group has remained constant across the first three cycles of TALIS and new members have been appointed as required. The TAG may also recommend that the OECD Secretariat contracts additional experts for advice on particular issues on which they do not feel competent to advise.

1.3. Section 2: Statement of work

1.4. Core A: Main survey and centralised tasks for all modules

110. The main objective of the survey is to deliver an international data set that provides comparable indicators and key statistics and enables a range of statistical and policy analyses. The indicators and policy analyses should give policy makers and practitioners the opportunity to examine and evaluate system- and school-level policies and practices related to teachers and teaching.

111. The work of the Contractor of Core A (also referred to as “the Contractor”) mainly consists of implementing the TALIS 2024 survey. This includes the main survey, but also its additional components: the usual ISCED 1 (primary) and 3 (upper-secondary) modules, the TALIS-PISA link module, the ISCED 0 module (TALIS Starting Strong), the new novice teachers module and the Teacher Knowledge Survey assessment module. It also includes managing and chairing the Questionnaire Expert Group (QEG) and the group of National Project Managers (NPMs), designing of the sampling procedure, implementing and operationalising the survey, processing collected data as well as supporting reporting activities.
The Contractor shall deliver a high quality product on time and within budget and therefore needs sufficient authority to implement the survey for all six of the target samples and make decisions on a day-to-day basis concerning all aspects of implementation. The Contractor should budget for preparing all survey manuals and instruments in English (British spelling). Working documents and training manuals shall be prepared in English and NPMs will be required to have a sufficient knowledge of English to understand these documents. Moreover, the Contractor shall have sufficient budget and authority to develop and apply effective quality assurance procedures during the project.

The implementation of the surveys covered by Core A can broadly be divided into twelve main tasks that are listed and then detailed below:

- Task A1: Establish, manage and chair the Questionnaire Expert Group (QEG)
- Task A2: Production of the TALIS 2024 concept paper and conceptual framework
- Task A3: Development of the main survey questionnaires
- Task A4: Translation, translation plans and verification
- Task A5: Development and maintenance of computer platform
- Task A6: Sampling
- Task A7: Survey operations and quality control
- Task A8: Data processing
- Task A9: Data scaling (optional)
- Task A10: Production of the technical report and user guide
- Task A11: Support for the preparation of international reports
- Task A12: Project management

In preparing their response to this call for tenders, bidders are invited to systematically discuss how each task will contribute to the success of TALIS 2024, by describing how they fit in the overall design and architecture of the project, what risks could be incurred and how these risks will be mitigated.

1.4.1. Task A1: Establish, manage and chair the Questionnaire Expert Group (QEG)

The Contractor will establish, chair and manage the Questionnaire Expert Group (QEG), whose responsibility is to devise the framework, items for the survey instruments. The Contractor will establish the expert group in consultation with the OECD Secretariat and the TGB. The Contractor will manage the meetings of this group during the development of the framework and instruments. Bidders should include in their proposals a description of how this group will operate. Participating countries will also be asked to suggest experts for this group for consideration by the Contractor, and the OECD Secretariat shall participate in this expert group and its meetings. The QEG shall be composed of at least:

- one member from the OECD Secretariat
- one member of the sampling team
- one member with expertise in linguistics to advise on the translatability of the source questionnaire (unless an assessment translatability is independently undertaken by linguists)
- experts with expertise in the main policy themes selected for TALIS 2024 as well as with experience in survey-based education policy research and instrument development in the international context.
116. Should any of the usual options be undertaken, the QEG shall also include experts relevant to the corresponding option(s). At a minimum:

- expert(s) with expertise in the levels of education needed (ISCED 1 and ISCED 3)
- one expert or consultant ideally drawn from the PISA QEG to help ensure synergies across surveys (TALIS-PISA link).

117. Should the ISCED 0 module, the novice teachers module and/or the TKS assessment module be undertaken, their Contractor(s) will nominate and recruit additional QEG members with relevant expertise (see Cores B to D). The Contractor of Core A, should it be different from the Contractor(s) of Cores B, C and/or D, will ensure integration of these additional experts in the QEG in view to the successful development of the Core B, C and D instruments in consistency with the main survey teacher and principal questionnaires.

118. The concept paper, the conceptual framework and the survey instruments (see Tasks A2 and A3) are developed by the QEG under the responsibility of the Contractor. The bidders should demonstrate that they have the capacity to attract high quality scientific and policy evaluation and design expertise to form the QEG. It is important that the Contractor demonstrates that those developing the concept paper on TALIS 2024 content, the framework, and the questionnaires have a sufficient understanding about schools and the social, cultural, and educational environments in which teachers teach, including the educational systems and the cultural contexts of participating countries as well as emerging themes and policy issues in a forward-looking perspective. Bidders are informed that the review of proposals for TALIS 2024 will place specific emphasis on this criterion, therefore bidders should describe how they will compensate for any under-representation of specific contexts/geographic areas.

119. It will be the responsibility of the Contractor to specify and implement procedures that promote excellent communication among members of the QEG. The bidders should suggest how a good working relationship can be established and maintained from the beginning.

120. In TALIS 2018, five physical meetings were held during the framework and instrument development phases, with each meeting lasting 2-4 days. There were also shorter remote meetings via webinars or conference calls. The bidder is free either to follow this pattern or to propose an alternative method of working with the group. Bidders should describe the number of QEG meetings they have included in their budget, and should describe how they would call on the expertise of group members outside of formal meetings. Bidders are encouraged to submit proposals for making the most efficient and cost-effective use of remote meetings as an alternative to physical meetings.

121. Bidders should include in their cost proposal all expenses associated with the contributions of experts (with the exception of the experts from Cores B, C and D) and for holding QEG meetings, such as travel, accommodation, subsistence and honorariums to expert group members. A few members of the OECD Secretariat team will generally attend meetings and the Secretariat will cover their own associated costs.

122. The key products from Task A1 will be:

- establishment of the QEG
- effective management of the day-to-day running of the QEG and communication with relevant stakeholders
- management and schedule of meetings.
1.4.2. Task A2: Production of the TALIS 2024 concept paper and conceptual framework

123. The TALIS conceptual framework represents the conceptual underpinning of TALIS, and development of the TALIS 2024 conceptual framework is the foundation on which all subsequent work on the cycle will be based. It is therefore essential that the conceptual framework be based on sound theoretical principles and an understanding of the state of the art in the relevant areas (research literature review), as well as a thorough understanding of emerging policy issues in the area of teaching and learning, to be outlined in a concept paper (see also information in Section 1). The conceptual framework must also take account of the policy imperatives of the TGB and the methodological demands of large scale international surveys. The first step of the framework development has to be the delivery of a concept paper within the first six months of the contract highlighting the main directions proposed for the TALIS 2024 conceptual framework (including sections on the ISCED 0 module, TALIS Starting Strong and the TKS assessment module), that will form the basis of consultation with key stakeholders. Core A Contractor will need to collaborate with Contractors of Cores B to D in developing sections of the concept paper relative to the ISCED 0 module, the optional module of novice teachers and the TKS assessment module. Bidders shall outline their proposed approach to develop the concept paper.

124. The framework development should be informed by the TGB feedback on the concept paper and the results of a prioritisation process with participating countries to identify indicators to be retained as trend items over subsequent cycles. Bidders shall outline their proposed approach to undertake this prioritisation process.

125. Following the approval of the concept paper by the TGB, the Contractor shall work with the QEG to revise and redevelop the conceptual framework that was prepared for TALIS 2018\textsuperscript{16} to ensure it is up to date with major developments in the fields selected to be the focus of the TALIS 2024 questionnaires.

126. The Contractor will be expected to present the concept paper followed by draft conceptual framework to the OECD Secretariat and to the TGB (either in person at a TGB meeting, if timing permits, or via webinar and written procedure through the OECD Secretariat) and provide opportunities for countries and the Secretariat to provide feedback on the documents. It is also expected that the draft conceptual framework be reviewed by the NPMs. The final conceptual framework will form the basis for questionnaire development. The Contractor will provide the draft and final versions of the conceptual framework in English.

127. Should the optional survey of novice teachers be undertaken the Contractor will also need to integrate issues specific to this option into the conceptual framework, with inputs from the expert recruited by the Contractor of Core C.

128. Separate conceptual frameworks will be developed for the ISCED 0 module (as part of Core B) and the TKS assessment module (as part of Core D).

129. The key products from Task A2 will be:

- development of the concept paper on TALIS 2024 content in English
- draft and final versions of the Core A conceptual framework in English.

1.4.3. Task A3: Development of the main survey questionnaires

130. The Contractor will work with the QEG to develop a survey design which will meet the requirements for valid measurement on the concepts targeted (as defined in the conceptual framework), provide a reliable estimation of trends over time, and lead to interesting insights in policy-relevant areas.

\textsuperscript{16} Available with the key background documents for bidders in the download section of the call for tenders.
131. The Contractor will work with the QEG to prepare draft versions of the teacher and the principal questionnaires in English for the main target population (ISCED 2 level) and, after receipt of comments from the TGB and the OECD Secretariat, revise and complete them before each operation phase: the pilot phase, the field trial and the main study. Information regarding the main themes of the TALIS 2018 questionnaires can be found in Section 1 above. The Contractor will also need to prepare the French versions of the field trial and main study questionnaires for the main survey (ISCED 2 level). See Task A4 regarding translation.

132. The Contractor will use the feedback gathered in the pilot and the data collected in the field trial to revise and improve the various questionnaires. Bidders should describe the methodology they propose using for designing a pilot phase that will yield the information needed to prepare the questionnaires for the mandatory field trial phase. The Contractor will also collaborate with the Contractor of Core D, should it be different from that of Core A, for including any specific piloting methodology that will yield the information needed to prepare the instruments for the TKS assessment module for the mandatory field trial phase. Bidders are asked to describe how they will use the pilot outcomes and the data from the field trial phase to inform the further development of the questionnaires for the next phase of the project.

133. The Contractor will provide stakeholders with sufficient opportunities and time to provide feedback on the draft versions of the instruments for the pilot, field trial and main study phases of development. Stakeholders include participating countries (through the TGB and/or NPMs), the Secretariat, the European Commission and the Teacher Union Advisory Committee (TUAC/Education International). Bidders should describe how they will manage this feedback process and ensure that all stakeholders have an opportunity to be engaged in this process.

134. Bidders should describe how they would improve the cross-national comparability and validity of the questionnaire measures. The Contractor shall improve the current translation procedures. Prior to the pilot phase, this could be done by calling on the expertise of linguists either as part of the QEG or through the conduction of a translatability assessment of the source questionnaires and especially of their new content. For example, the technical documentation regarding the translatability assessment conducted for PISA 2018 can be consulted. The Contractor shall also improve the cross-cultural validity of existing questionnaire measures through the exploration and application of novel techniques, e.g., variations in the number of response options, variations in the wording of response options, scale anchoring, situational judgement tests, anchoring vignettes, forced choice items, etc. Proposed innovations should be balanced against cognitive load and their potential effect on the measurement of trends. While bidders are encouraged to consider new item formats, sufficient work studying the functioning of any such items should be invested to ascertain their viability and technical soundness before any use in the main study. The TGB has already identified some areas for which evolutions and updates to the items are seen as desirable, which bidders are invited to consider. These include the measurement of:

- **Teaching** practices, to move from measuring the time allocated to different activities to measuring instructional decision-making in the classroom (for example by using situational judgement tests). Bidders shall for example consider adapting some of the TKS assessment items that measure “practice-based” general pedagogical knowledge. These are classroom or situationally-phrased context-specific items, and answering them requires teachers to apply professional judgement. Bidders are also invited to suggest new ways of capturing teaching practices, including but not limited to observed practice using video study or voice recognition. If so, the aim would be to propose an approach that yields comparable insights across countries (i.e. overcoming possible response biases of self-reported data), and is manageable in terms of implementation burden and cost. Bidders need to take account of technological constraints for survey administration in some contexts and countries when they elaborate on potential innovations. A description

---

of the implications for administration burden, response time duration and costs of different options shall be provided.

- **Professional development**, to develop new items measuring motivation for participating in continuous professional development, together with narrowing/differentiating the definition of professional development to consider separately participation in school-provided or self-directed professional development.

- **Special needs education**, to consider ways to improve the identification question of special need education teachers (Question 36 in the TALIS 2018 teacher questionnaire), and allow these teachers to answer questions on teaching practices; distinguish among different types of special need students, at least in some questions (and with gifted students potentially considered as a category that also deserves special attention).

135. The Contractor shall ensure that the overall length of the questionnaire(s) in English and French (see Task A4 regarding French translation) is shorter than in the current TALIS 2018 design. As TALIS 2018 has reached the limits of the number of topics that can be covered with the current questionnaire design and the target response time of 45 minutes, the introduction of a split-questionnaire design should be proposed. Questionnaire development should aim to keep the trend items (equivalent to about 1/3 of total questionnaire) unchanged and propose evolution for about 1/3 of the items and development of new items for about 1/3 of the questionnaire. Bidders are invited to propose criteria on which existing items could be judged for inclusion. The trend items will be selected in discussion with the OECD Secretariat and participating countries through the TGB.

136. An incomplete block design for questionnaires (split-questionnaire design) should be proposed that maintains the core (mostly trend) items and rotates the other themes across respondents. The design should decrease the individual response time while increasing the coverage of topics with limited or no increase in sample size. For example, the design of the PISA 2012 student questionnaire can be consulted. The incomplete-block design should be devised in such a way that allows as much flexibility as possible for adjusting in future cycles. Bidders are invited to describe the advantages and drawbacks of a split-questionnaire design in comparison to a single complete questionnaire for analysis, administrative burden, risk factors and costs. The final questionnaire design will be determined in discussion with the OECD Secretariat and participating countries through the TGB.

137. In TALIS 2018, the default mode of data collection was online questionnaires. Of the 48 participating countries/economies, 37 used the online mode exclusively, 3 used only the paper mode exclusively, and 8 used a mix of both. For TALIS 2024, it would be ideal to administer the survey online as the single administration mode. Therefore, TALIS 2024 instruments should be designed for online administration, to benefit from all the functionalities offered by this administration mode (e.g. coherence checks, filter management, change of question/item order). Bidders are invited to discuss how the functionalities of online administration could be exploited for the instrument design. They should also consider having a mixed-mode approach – offering to administer the questionnaire on computer offline (e.g. using USB sticks) and/or on paper – in case a few countries are not able to administer the survey online to the whole or part of the surveyed populations. Should a mixed-mode approach be undertaken, the Contractor may need to develop differentiated questionnaire designs depending on the administration mode.

138. Some adaptations of the main survey questionnaires may be required for the ISCED 1, ISCED 3 and TALIS-PISA link modules. All major adaptations will need to be determined before the field trial phase.

---

139. The development of survey instruments for the other modules – ISCED 0, novice teachers, and Teacher Knowledge Survey assessment – is covered in Cores B to D of this call for tenders. Bidders on Cores B to D should budget the development of these optional instruments separately in the costing proposal. However, Core A Contractor will need to program the instruments developed by Contractors of Cores B to D into their computer-based survey and prepare the paper back-up for these (only applicable for Cores B and C). See Task A5 for more information.

140. The key products from Task A3 will be:
- in collaboration with the QEG, develop and revise items for the teacher and principal questionnaires following feedback from stakeholders and analyses of pilot and field trial data
- define a suitable questionnaire design (e.g. split-questionnaire design) to allow for sufficient coverage of topics while limiting questionnaire length and sample size
- laid-out and formatted versions of the teacher and school principal questionnaires for the instruments of the main survey and the usual modules in English and available in computer and possibly paper versions for the pilot, field trial and main study phases of data collection.

1.4.4. Task A4: Translation, translation plans and verification

141. Cross-national comparability of the data-collection instruments used in international surveys is an essential element of ensuring the validity of measurement, and linguistic and translation quality control is a vital task in the achievement of this comparability. Once the Contractor, with input from the QEG, has completed the task of developing the English versions of the questionnaires, it will prepare the French version of the questionnaires for the main survey (ISCED 2). This will apply to every survey instrument available in any other undertaken module, provided that French-speaking countries subscribe by the time of the contract signature. Bidders are asked to provide a separate cost estimate for translating additional survey instruments into French. In managing the translation and verification process, the Contractor will need to ensure equivalence with the English versions and perform a final translation verification check. Bidders are invited to describe their plans to achieve this goal. The Contractor will then share the English and the French source questionnaires with the national centres.

142. The Contractor will need to ensure the high quality and comparability of all translated materials for the data collection materials (e.g. the questionnaires, related training materials). Translation will be managed by the national centres, under the responsibility of NPMs. The national centre will not only be responsible for translating but also for covering all expenses associated with this task. The Contractor will provide NPMs with appropriate guidelines for translation and adaptation plans and training to ensure that national centres follow the same quality procedures in the translation and national adaptations of their materials.

143. Translation and national adaptations will be required for the questionnaires for the pilot (as relevant), field trial and main study phases for all survey components undertaken. Moreover, translation will be needed for supporting materials such as teacher listing forms, teacher tracking forms, cover letters for schools and consent forms for survey participants. Translation and national adaptations will also be required for the Teacher Knowledge Survey assessment instruments. Bidders should provide separate costing for each of the instruments for these tasks in their budget.

144. The Contractor shall ensure that the translation of the proposed data-collection instruments reflects the language as used in each participating country (e.g., the Spanish-language version developed for Spain will require modification before it is suitable for use in other countries in which Spanish is also used). Depending on the number of languages in which TALIS 2024 is administered in each country, one or more national versions of all data-collection instruments must be developed. In all instances, the Contractor must ensure the cross-national comparability of all instruments in different languages.
145. In TALIS 2018, among the 48 participating countries and economies, 9 administered the questionnaires in more than one language (ranging from 2 to 5 languages). Bidders are asked to include one national language adaptation per country in their budget. In some cases, countries may wish to produce more than one nationally adapted and translated set of instruments and documents in which case additional contracts may be required. If so, the additional work should be negotiated and contracted directly with countries. However, bidders must provide an indication of their costs for such additional national adaptations and translations. More information about the procedures followed in TALIS 2018 can be found in the TALIS 2018 Technical Report.\textsuperscript{19}

146. The Contractor will have the ultimate responsibility to ensure the accurate translation of data collection materials and should ensure with the QEG that the intended meaning of the items is maintained after translations. Advice and input from linguist(s) (either as member(s) of the QEG or as external consultants) and possibly from the translation referee will be key for this goal. The bidders are invited to consider conducting more extensive translatability checks before piloting the questionnaires.

147. The pilot study has a key role to play in testing the translatability of question items and the quality of translations, identifying risks of possible violations of measurement invariance due to translation issues such as different length of questions per language, difficulty to translate concepts, etc. The Contractor will produce a detailed glossary of terms used in the instruments and manuals to help ensure a homogeneous understanding and consistent use of the terminology to be translated by national centres. The Contractor will also prepare an annotated version of the instruments to advise national centres of any specific issues to be considered in particular questionnaire items or in the interpretation of particular terms or phrases. Furthermore, the Contractor will develop manuals and training materials for national translators and to train National Project Managers (NPMs) in the processes and procedures for translation and national adaptation. The TALIS 2018 field trial and main study translation and adaptation guidelines are available on the TALIS tender website.\textsuperscript{20}

148. Bidders should describe their approach to those training and advisory tasks, and should outline how they would plan to train and support both experienced and less experienced national TALIS teams. During NPM meetings, the Contractor will conduct training sessions in translation and verification procedures and to carry out individual consultations with NPMs as required.

149. Bidders should describe in detail the approach they will take to manage the national translation and adaptation process. This may include for example, the use of adaptation, translation and verification forms, or use of a portal which can track and monitor different versions and workflow throughout the process in such a way that construction of the national versions of instruments is as smooth and seamless as possible. Bidders are encouraged in particular to consider how technology could be used to enhance the quality of translations and adaptations, e.g. in fostering the consistency of translations over time (i.e. with previous TALIS cycles), across instruments (for the different survey populations and modules, but also with the PISA teacher questionnaire), or across questions within instruments.

150. The Contractor will also review and propose updates to the technical standards regarding the translation and adaptation of questionnaires and manuals, to be considered and adopted by the TGB.

151. Bidders should identify how they will ensure that the translation of data collection materials is in accordance with the objectives of the design of survey instruments and questionnaire items. The proposals from bidders must specify their recommended method of translation (e.g. double translation followed by reconciliation, back translation, team translation etc.) as well as the procedures they will apply to ensure: i) comparability; ii) quality control.

\textsuperscript{19} Available with the key background documents for bidders in the download section of the call for tenders.

\textsuperscript{20} Available with the key background documents for bidders in the download section of the call for tenders.
152. Different from previous cycles of TALIS, a translation referee will be tasked to arbitrate any disagreement arising between countries and the Contractor on issues of translation and adaptation. The bidders are asked to propose names for a potential translation and adaptation referee who will need to be independent from the translation/adaptation process (The TGB’s opinion on the nomination will then be consulted). The translation referee will review the evidence prepared by the Contractor on the national processes, and in consultation with the Contractor, the Technical Advisory Group (TAG) or other experts and with the OECD Secretariat, will provide recommendations for data adjudication.

153. Similar services and key products will be required for the teacher and principal questionnaires (ISCED 2) and their adapted versions for the usual options (ISCED 1 and 3, TALIS-PISA link), for the ISCED 0 questionnaires, the questionnaires administered to new teachers and former teachers (as applicable), and the Teacher Knowledge Survey assessment and questionnaire, as applicable. Bidders should provide separate costing for each of the survey instruments in their budget. For the ISCED 0 module, information on the procedures followed in TALIS Starting Strong 2018 can be found in the TALIS Starting Strong 2018 Technical Report.

154. The key products from Task A4 will be:
- French translation and verification of the source questionnaires (as applicable)
- proposals for nominating the translation and adaptation referee and management of the nominated referee
- glossary, annotated questionnaires, training manuals and translators’ guide to guide national centres in their translation tasks (in English only)
- management of relationship with NPMs to deliver timely, efficient and accurate translation of data collection materials
- quality control measures, technical standards and management of translation processes
- management of translation verification
- translation report to support translation refereeing and data adjudication.

1.4.5. Task A5: Development and maintenance of computer platform

155. The Contractor will be responsible for developing and maintaining the computer platform for delivery of TALIS 2024 questionnaires and data collection. This includes the construction of national versions of questionnaires (and the TKS assessment as relevant) within the platform and the integration of sampling, translation and verification tasks. It also includes maintenance and further development of the portal used for communication between the Contractor and national centres and support for all users. It also includes making the questionnaires available on a broad range of other equipment/operating systems.

156. The platform must be capable of all functions from questionnaire item development through to delivery of the questionnaire, i.e. item development, item review, questionnaire compilation in particular in relation to the split-questionnaire design should it be adopted, translation, questionnaire delivery and administration, and the development of paper-based versions for countries opting for a mixed-mode approach (as applicable). Data capture software shall also be integrated to facilitate data entry if some countries decide to administer the questionnaires on paper. The optional tasks related to deploying the questionnaires on paper shall be budgeted separately in the bidders’ financial proposal. Bidders are invited to consider making it capable for onscreen coding of open-ended responses. Bidders are also invited to consider collecting meta-data on the navigation behaviour of users (log files) and describe appropriate consent and data privacy measures that would need to be taken to this end (see also Section 2 on personal
data processing). In addition, bidders are also invited to consider making the platform capable to track real-time participation rates for each module/instrument.

157. The platform must be robust and user-friendly. The Contractor must develop adequate contingency plans that can be deployed in the event when systems fail during survey administration. Vigorous testing should be performed during the development phase. Assistance to platform users must be available on a 24/7 basis during data collection periods. In addition, the Contractor will need to take measures to prevent computer attacks or intruders from accessing confidential information or data.

158. The platform should be based on an open-source solution that enables the creation and delivery of computer-based questionnaire online. Bidders should identify in their responses any limitations on the following positions in respect of intellectual property rights (IP): all questionnaire items, associated data and results will be owned by the OECD; all aspects of the 2024 delivery systems will be owned by the OECD or be non-proprietary. The strong preference is either for all IP in the delivery system to be owned by the OECD or for the proposed solution to be a non-proprietary solution similar to the open source solution for PISA 2018. Bidders are asked to clarify their position regarding the IP implications of their proposed solutions and must specify where 3rd party rights are being used and therefore cannot be assigned to the OECD. This would include making the 2024 system available to companies wishing to bid for a questionnaire delivery role in following TALIS cycles and in other OECD projects.

159. The key products for Task A5 are:
   - development and maintenance of a computer-based platform
   - provision of trouble-shooting support to users on a 24/7 basis during data collection periods.

1.4.6. Task A6: Sampling

160. A key aspect of the validity of TALIS data depends on the development of robust sampling procedures which can both take account of the varied demographic profiles of TALIS countries and economies and ensure that each sample adequately represents the underlying population.

161. The success of TALIS also rests on the creation of an internationally comparable dataset that is also comparable across each of the target populations and comparable to the datasets from the previous TALIS cycles. This requires the development and implementation of a sampling methodology and set of procedures that are completed on-time and implemented with high-quality precision.

162. Background information on TALIS sampling in previous cycles can be obtained from the sampling manual for TALIS 2018 field trial and the sampling manual for the TALIS 2018 main study. Furthermore, the TALIS 2018 Technical Standards and the TALIS 2008, TALIS 2013 and TALIS 2018 Technical Reports give details on the sampling approaches used in previous cycles of TALIS.

163. The Contractor shall devise and implement a sampling methodology that should cover the issues discussed in Section 1 of the terms of reference. To this end, the Contractor will be required to prepare draft and final versions of the sampling plans for the field trial and main study for the main survey and any undertaken survey module. Sampling plans should specify methods and technical standards for decisions regarding inclusion/exclusion; incorporate improvements to existing practices where appropriate, including the mechanisms for assessing the adequacy of participating countries’ sample frames and for assuring the

---

21 Available with key background materials for bidders in the download section of the call for tenders.

22 Available with key background materials for bidders in the download section of the call for tenders.
adequate demographic and geographic representation of teachers and schools; include procedures that would be used in drawing robust country samples from the sampling frames; and ensure that a 95% population coverage is obtained in all participating countries. The bidders can consult the proposed changes to the sampling design suggested by the Third face-to-face TAG meeting.23

164. The sampling method should allow for meaningful linkages of teacher responses with those of the school principal and with school and other teacher characteristics. The methodology should identify: the target populations; the sample size of schools, school principals, and teachers; the survey procedures (including the rationale for choice of survey procedures); the requirements regarding coverage of the target populations and participation rates of schools and school principals and teachers; and other issues such as the sampling requirements for smaller countries/economies.

165. Bidders should outline how they will approach the task of developing the sampling plans and should describe in particular how they propose to assign forms to respondents as mandated by an incomplete-block design for questionnaires including those for the modules being developed under Cores B, C and D (as applicable). All significant changes in the sample from the previous cycles should be assessed with respect to the impact on measures of trend in variables and indicators.

166. The Contractor must ensure the integrity of national samples. For this purpose, the bidders will propose names for the potential sampling referee and the TGB’s opinion will then be sought on the proposals. The referee cannot be involved in the sampling process.

167. The Contractor shall develop sampling standards and develop quality control procedures for assessing and ensuring that the TALIS technical standards on sampling are met and to gain approval from the sampling referee for these procedures. The Contractor shall establish procedures (that the sampling referee should validate) for dealing with samples that do not meet the predetermined sampling standards and this may include, for example, evaluation of the outcomes of national or regional non-response bias analysis. This activity will be carried out as part of the broader data adjudication process, which will be managed by the Contractor. The contractor shall provide a sampling adjudication report with evidence about the quality of each of the samples for each participating country/economy and for each of the instruments, as well as the implications of sample quality for the use of country results in the international and thematic reports for the validation of the sampling referee. This adjudication report will be submitted to the OECD Secretariat after validation by the sampling referee according to the agreed-upon timelines.

168. The Contractor should also review and revise TALIS 2018 guidelines to countries for the investigation of non-response bias in TALIS 2024. In TALIS 2018, only countries with a low participation rate were invited to submit a non-response bias analysis report. Bidders are invited to consider: i) reviewing the circumstances under which conducting non-response bias analysis is requested; ii) how they could best assist countries in the examination of non-response bias, for example in an iterative manner during the data-collection period. Recommendations from the TAG on this matter can be consulted.24

169. Bidders should describe how they will monitor observations of quality control procedures in such a way that early notice can be given to the TGB (through the OECD Secretariat) of problems with sampling or response rates that may or will jeopardise countries’ compliance with the agreed sampling guidelines and technical standards. If such notice shall be required, the Contractor should provide an explanation for the problems or concerns and, when possible, suggest remedies for them. The sampling referee shall arbitrate disagreements between participating countries and the sampling team under guidelines established by the TGB, and in consultation with the OECD.

23 Available with key background materials for bidders in the download section of the call for tenders.

24 Available with key background materials for bidders in the download section of the call for tenders.
The Contractor will develop sampling weights for each surveyed population (and each instrument) of each participating country or economy, to be used in the preparation of the international databases. For example, for the main survey at the ISCED 2 level, sampling weights must be prepared and included in the main study datasets, for both school leaders and teachers (see also Task A8 for additional information). Bidders should consult the information on sample weighing in the TALIS 2018 Technical Report and describe their approach to this task, outlining any innovation or improvement they would suggest especially in light of using a split-questionnaire design.

The Contractor shall consult with the participating countries and economies as they develop their sampling frames. To this end, the Contractor will develop sampling manuals and training material for national centres. Bidders should review the sampling materials which are on the tender website, and should outline in detail how they would plan to improve and add value to the procedures used in TALIS 2018 which are outlined in these documents. This should include both any changes which may improve the quality of sampling and any revisions in procedures which would improve efficiency and reduce costs for national centres.

The Contractor will conduct training sessions at National Project Managers (NPM) meetings in sampling procedures and to carry out individual consultations with NPMs as required. Bidders should describe what their priorities would be in arranging consultations and how they would support NPMs whom they have not been able to meet individually. Bidders should also describe how they would use alternative methods such as webinars or online training materials to support national centres.

Bidders should describe how they would work with countries to ensure that each country`s sample fits both their national requirements and the needs of the TALIS survey. This may include, for example, taking steps to maximise or minimise overlap with other national or international samples, including PISA 2024, which will be held during a similar timeframe. Such overlap control measures shall be offered free of charge to countries requesting them. The bidders should give details of any software which will be used for sampling at either the national or international levels.

Bidders should describe strategies that might be considered for the TALIS-PISA link (should this module be undertaken by countries) to ensure that the final sample will include sufficient numbers of schools with PISA data to perform meaningful analyses. This will require close co-ordination with the sampling contractor for PISA and will need to take into account the sampling timelines for PISA.

The Contractor shall consider countries` national interests when drawing the school and teacher samples, and should assist those who have additional requirements to maximise the policy relevance of their participation in TALIS. National variations in the sample may include, but not necessarily be limited to, the following:

- over-sampling of particular groups (e.g. to provide additional reporting for particular groups of teachers or schools, or reporting at regional level)
- sampling of an “adjudicated region”, which is a region in which a sample is drawn and independently adjudicated of the main national entity.

The bidders will provide costs for such tasks.

The Contractor will also be expected to accommodate small variations which do not entail a large number of additional procedures or extensive additional weighting steps within the procedures already included in these Terms of Reference, without additional cost. Bidders are asked to describe their approach to such national variations and, in particular the extent of sampling variations which they can offer to

---

170. Available with the key background documents for bidders in the download section of the call for tenders.

171. Available with the key background documents for bidders in the download section of the call for tenders.
countries within the budget proposed in their response to this Call for Tender. In some cases, national variations may involve a substantial amount of additional work from the Contractor and additional contracts may be required. If so, the additional work should be negotiated and contracted directly with countries. However, bidders are asked to give an indication of their costs – if any – for commonly required additional national sampling options such as drawing of samples to enable regional comparisons or adjudicating data for specific subnational regions.

178. The Contractor should provide input to the Questionnaire Expert Group (QEG) in developing the questionnaire and in pertinent aspects of the development of survey instruments and questionnaire items as they relate to sampling issues. This shall ensure that: i) the QEG receives sufficient sampling advice when required for instrument and item development so that items can be successfully implemented and validated under the sampling framework developed by the Contractor; and ii) the Contractor is aware of the sampling requirements under which items were developed for both the principal and teacher questionnaires. It is envisaged this would require a member of staff of the Contractor with the required sampling expertise to attend face-to-face meetings of the QEG.

179. The Contractor will follow a similar approach for the sampling of TALIS Starting Strong and pay particular attention to the specificities of the ECEC sector (e.g. small size of centres, multiplicity of setting). The Contractor shall devise and implement a sampling methodology that should cover the issues discussed in Section 1 of the terms of reference for the ECEC target population including staff and leaders for pre-primary education (ISCED 02) and for children under the age of 3, including home-based settings. The TALIS Starting Strong 2018 Technical Report gives information on the sampling approaches used in the 2018 cycle. Particular attention will be given to ensure the cross-country comparability of target populations. Lack of comparability of target populations for the ECEC sector can come from various sources including differences in national definitions of registered settings, in approaches to home-based settings and in definitions of eligible staff as all persons working regularly in a pedagogical manner with children. The Contractor will have to fully document the sampling frame in each participating countries. Bidders should also explain their approach to non-response bias analyses and their strategies to ensure that those analyses can lead to meaningful results taking into account the specificities of the ECEC sector.

180. The Contractor will also need to perform sampling tasks for surveying novice teachers in their first years of a teaching career, should this new module be undertaken (see a description of this module in Section 1 as well as information on specific instrument development for this module in Core C of this call). Bidders are invited to describe their approaches for two alternative scenarios: i) a longitudinal study of novice teachers in their first years of teaching experience, with one or two follow-up studies one and/or several years later; ii) a cross-sectional study of novice teachers with different advancement in the career.

181. The Contractor will be asked to develop a sampling strategy to collect a representative sample of each of the target populations. In both scenarios, it could be considered to oversample novice teachers. Bidders are invited to discuss the process of identifying the minimum sample size for each of these samples and to provide approximate sample sizes for them. In devising their sampling plans, bidders are invited to take account of higher national costs implied by the possible need to oversample schools and to ensure participation of more schools than required for the main survey. A major challenge for the longitudinal scenario is that the sampling strategy must be longitudinally viable. Bidders are invited to provide a risk assessment and to make assumptions about attrition rates in designing their sampling plans for this scenario.

182. The Contractor will need to complete sampling related-tasks for the TKS assessment module, provided it goes forward. For the countries administering this module to the whole ISCED 2 teacher population and/or to novice teachers, the Contractor will need to review sampling requirements to allow for sufficient data points (given the fact that lower response rates are expected). Data collected for this module will also need to be adjudicated and sampling weights estimated.

183. The key products from Task A6 will be:
• proposal for nominating the sampling referee and management of the nominated referee
• sampling plans for the field trial and the main study for all target populations of the main survey and the undertaken modules, as applicable
• sampling manuals and training manuals (in English) for national centres
• sampling standards, quality control procedures, and preparation of materials to support sample refereeing and adjudication process
• sampling weights for the main study for all target populations and instruments, as applicable
• input in the instrument and item development to ensure they shall be achieved within the sampling framework
• review and revision of guidelines for conducting non-response bias analysis
• input into analysis and reporting, especially in relation to the implications of the split-questionnaire design on analysis, should it be adopted
• sampling report to support sampling refereeing and adjudication (in English only).

1.4.7. Task A7: Survey operations and quality control

184. Once the survey instruments have been developed, the Contractor will need to transform the instruments into a useable survey. The Contractor will be required to arrange the layout of data collection materials, for each of the target populations and instruments, if applicable. Bidders should demonstrate their capability and experience in producing survey documents and data collection materials. The data collection materials should include a school co-ordinator manual to be used in each school to ensure consistent data collection across schools. Similarly, centre co-ordination manuals to be used in each ECEC centre and tailored to specific survey operations challenges in an ECEC context should be produced for TALIS Starting Strong. The Contractor will also need to develop a school co-ordinator manual for the administration of the TKS assessment module (or include relevant sections in the main survey manual), with special attention paid to ensuring teachers’ participation in the module. The TALIS 2018 school co-ordinator manuals (field trial and main study) are available on the TALIS tender website for bidders.²⁷

185. The Contractor will prepare all data collection materials for each of the target samples in English, and then distribute these materials to national centres. Countries will then translate the data-collection instruments and materials into their national language(s), following the technical guidelines provided by the Contractor and explained in their proposals (see Task A4).

186. The Contractor shall plan and then implement survey operations and procedures aligned to the survey methodology for online administration (and paper-based administration if applicable). This includes the related aspects of quality control and the training of country representatives in these procedures (e.g. NPMs, school co-ordinators, etc.). This shall be required for each of the target populations and instruments, should they be undertaken. All training materials shall be developed in English.

187. In any international survey, agreed standards are essential to ensure validity, reliability, and comparability across countries and over time. This requires the agreement of all participants on an international refereeing process and on procedures for quality control. The Contractor, in conjunction with the OECD Secretariat, shall review and prepare a proposal for the TALIS 2024 technical standards. The

²⁷ Available with key background materials for bidders in the download section of the call for tenders.
proposal will be presented to the TGB in order to seek consensus among participants on the standards. The current technical standards are available from the TALIS tender website.  

188. For the novice teachers module, should the longitudinal scenario be undertaken, the Contractor will need to establish specific plans for following-up on the starting cohort of novice teachers and devise technical standards to ensure quality data collection throughout the study.

189. The Contractor will be responsible for monitoring that all national centres are following the TALIS 2024 technical standards. Bidders should describe in detail how they would do this. In particular, they should describe how such monitoring would be done and how any necessary support would be given in the case of newly participating countries or new national centres.

190. The Contractor shall establish plans for monitoring adherence to the technical standards during field operations in all countries. This will include national centre procedures and survey operations in the schools that participate. These plans shall include a requirement that the Contractor shall appoint and pay quality monitors to visit a number of schools in each of the participating countries to assess their compliance with the project’s guidelines for sampling, data collection, etc. Bidders’ discussion of quality assurance should specify how this requirement will be achieved, including, the criteria for selecting schools to be visited, and how the findings will be used to ensure the projects’ overall integrity. The number of schools to be monitored, methods of identifying and training quality monitors. The Contractor shall produce a national quality control monitor manual specifying the procedures to be followed (in English).

191. The Contractor will produce a quality monitoring report outlining countries’ compliance with quality standards throughout the project and which will be taken into consideration for the data adjudication and in decisions about data inclusion for the final reporting. Details about the quality control and monitoring procedures used in TALIS 2018 can be found in the TALIS 2018 national quality observer manual and the TALIS 2018 Technical Report.

192. Given the difficulty of some countries of attaining the required response rates in past cycles of the survey, the Contractor will be required to develop a strategy aimed at assisting countries in attaining acceptable response rates. The Contractor shall therefore assign each participating country a set of follow-up procedures aimed at achieving the required response rates. These should be included in the sampling manual. Bidders should identify the stakeholder engagement procedures to be undertaken to ensure high response rates, and develop tools to support national centres in the real time monitoring of response rates during survey implementation. Bidders are invited to consider randomising some of the engagement strategies (e.g. monetary incentives or school visits or phone calls), so that the strategy itself could be used as an instrument to redress the sample (either by incorporating it in non-response adjustments for weights, or to explore the potential for bias on survey items).

193. The key products from Task A7 will be:

- TALIS 2024 technical standards
- co-ordinator manuals for both school co-ordinators and ECEC centre co-ordinators
- strategies aimed at assisting countries in attaining acceptable response rates, with procedures specific to both a school context and an ECEC context as well as with procedures specific to the administration of a teacher knowledge assessment
- quality assurance procedures and management

---

28 Available with key background materials for bidders in the download section of the call for tenders.

29 Available with key background materials for bidders in the download section of the call for tenders.
• national quality control monitor manual
• quality monitoring reports on survey procedures and quality assurance procedures for the pilot, the field trial and the main study.

1.4.8. Task A8: Data processing

194. The key product of the TALIS 2024 survey are international databases containing all the data collected through the survey instruments. The Contractor shall ensure the data are properly submitted (on computer) or entered (for paper questionnaires if applicable), verified and cleaned and weights and variance estimations are computed. Datasets should be prepared containing the relevant sampling and variance estimation information. Bidders should also outline the quality control procedures to ensure an error-free, reliable dataset and identify mechanisms to ensure the direct comparability of datasets of all target populations (acknowledging that comparability between ISCED 0 dataset and other levels of education datasets may be more limited than between datasets of ISCED 1 to 3) and all survey cycles.

195. The Contractor shall clean all data collected through each of the target samples for the preparation of international databases, as applicable. This task is necessary for the field trial and the main study. Bidders are asked to indicate the types of cleaning/editing rules and checks that will be carried out on the data (e.g. handling of out-of-range values, consistency checks), and the mechanisms which will be put in place to ensure that checks are carried out by national centres as required.

196. With the data collected during the field trial, the Contractor shall conduct analyses to identify problems in the implementation of the administration procedures; investigate methodologies of data analyses (particularly consequences of the split-questionnaire design for data analysis and the methodology of scaling the data); investigate the properties of questionnaire and assessment items; and carry out other necessary analyses, which may be required to inform and improve the preparation of the final TALIS 2024 databases. The Contractor shall work with the QEG to develop proposals for the TGB for the development of the main study instruments, based on field trial data. Bidders should identify their capabilities and experience in data management at the international level and which member(s) of their management structure would assume responsibility for this task.

197. Descriptive statistics should be calculated from the datasets and appropriate investigations of statistical anomalies undertaken. Anomalies shall be identified and corrected and notification given to the relevant NPM if considered appropriate. The Contractor shall undertake and ensure that high-quality data verification and processing is undertaken for all stages of the survey. Bidders should describe the data verification procedures they will follow.

198. The Contractor shall provide user friendly data files for each sample, including a clear mechanism for merging and analysing the data files of each of the target samples and a separate dataset for the Teacher Knowledge Survey assessment module that can be linked to the TALIS main survey questionnaire responses to ensure that teachers across both datasets can be matched for analyses. For the TALIS-PISA link dataset, the Contractor will ensure that identifiers common to both the TALIS and PISA datasets are included to ensure that schools across both datasets can be matched for analyses.

199. The Contractor shall provide fully documented data products (including a compendia providing the distribution of responses according to the variables collected in the questionnaires) that shall be delivered to the OECD Secretariat in preliminary form and then in a final form by the dates specified in the agreed timeline. Bidders should describe the file formats in which data will be provided. This should

---

30 Information on the development and checking of the TALIS 2018 databases can be found in Chapter 8 of the TALIS 2018 Technical Report accessible online. Information on estimation weights can be found in Chapter 9 of the same report.
include at least one non-proprietary data format, to facilitate secondary analysis. This data product shall provide a set of basic indicators (and their components) and allow the OECD Secretariat, the TGB, and any relevant contractors to conduct their own further analyses. Accompanying documents shall be provided to facilitate such analysis, specifically the re-production of the main indicators.

200. The Contractor shall also provide all products accompanying the dataset. These include file descriptions, codebooks, and any indicators and indices formulae. These may be provided in the format of a user’s guide for the international database.

201. The Contractor should develop and implement a plan to ensure the data are readily accessible and user friendly for a wide range of potential users, including researchers, NPMs, policy makers, and others who would benefit from access to the data.

202. Conditional on the adoption of a split-questionnaire design, the Contractor shall also submit a proposal that describes the type of multivariate analyses that are recommended/not recommended as a consequence of it.

203. Similar approach will be followed to produce the international TALIS Starting Strong database for the ISCED 0 population. The Contractor will work with the OECD ECEC Network, and eventually with a separate Contractor for Core B, for the development of the survey instruments, based on field trial data.

204. Should the novice teachers module be undertaken, the Contractor shall submit a proposal for estimating weights for the samples of novice teachers in both the longitudinal and the cross-sectional scenario, accounting for attrition issues in the former scenario. The Contractor shall also submit a proposal that describes the type of analyses that are recommended/not recommended as a consequence of the longitudinal or cross-sectional design.

205. Should the TKS assessment module be undertaken, the Contractor shall submit a proposal for estimating the weights for the participating teachers, adjusted for possible non response in comparison to teachers participating in the ISCED 2 main survey and/or the novice teachers module. The Contractor shall also submit a proposal that describes the type of analyses that are recommended/not recommended for this module.

206. The key products from Task A8 will be:

- data verification rules and procedures
- the cleaned databases including:
  - data collected through both the teacher and school principal questionnaires for the main survey samples
  - data collected for other samples and through other instruments
  - any variables derived from these data
  - appropriate sampling weights
  - identifiers that allow for merging the datasets as appropriate.

1.4.9. Task A9: Data scaling

207. Bidders are advised that data scaling is an optional task of Core A and that the OECD will reserve the right to activate it or not in the course of the project.

208. The survey instruments will be comprised of many items. While some will be intended to be used in analysis as single items, others will be intended to be combined into scales to represent and measure targeted constructs, as defined in the conceptual framework. The Contractor, in consultation with the QEG, will be responsible for identifying a list of scales that could be derived from selected sets of items.
209. The Contractor shall submit a list of scales to the OECD Secretariat for its review and approval. The list of scales should include details of the composition of the scales and indices that are planned to be derived from the questionnaire items, in accordance with the reporting plan developed by the OECD Secretariat, and paying special attention to ensuring that the contemplated scales can be validly used for comparing the indicators derived from them across countries and populations (e.g. novice teachers vs all teachers; ISCED 1 vs ISCED 2)\footnote{For addressing measurement invariance, Aavisati, Le Donné and Paccagnella (2019\cite{aavisati2019}) and the OECD Education Working Paper by van de Vijver (2019\cite{vandevijver2019}) can be consulted.}

210. Then the Contractor shall submit a draft scaling procedure and a draft scale validation procedure to the OECD for review and approval. Bidders are invited to review the scaling stages and validation procedures done in previous cycles (in particular those described in the TALIS 2013 Technical Report) and suggest proposals on how they can be improved. Bidders are invited to describe the scaling approach considered (e.g. based on factor analysis methods or item response theory) and the measures taken to test the validity of the scales (e.g. reliability measures, measurement invariance testing, approach for addressing response bias). The proposition of modern approaches to measurement invariance testing is welcome. The scaling should ensure control for imperfect equivalence.

211. The Contractor shall submit draft and final technical documentations on the final procedures used, share software codes used for constructing all the scales included in the final database and assessing their validity with the OECD Secretariat.

212. The proposal for this task should take into account three key aspects: 1) the consequences of the split-questionnaire design for scaling data (as applicable); 2) a communication strategy plan with the Secretariat to align the scale development process with the reporting needs of the organisation; 3) a communication strategy plan with the Secretariat and the TAG to present in detail and discuss the scaling and validation procedure plans in a timely and transparent fashion.

213. Bidders are invited to describe how they will manage the whole data scaling process to ensure that scaling is conducted in a way that is transparent and timely to the OECD’s reporting needs, for example through the means of periodical updates on the scaling process and regular consultations with the TAG and the OECD.

214. Conditional on the module being undertaken, a similar approach will be followed to produce scales for the ISCED 0 module. Bidders are invited to reflect on the scales developed for the 2018 cycle (see the TALIS Starting Strong 2018 Technical Report) and propose ways to improve them.

215. Conditional on the module being undertaken, the approach to produce scales for the TKS assessment module will require some specific procedures. Bidders are invited to describe the specific steps for item calibration and scaling, and validity testing (e.g. differential item functioning (DIF) testing, multidimensional item response theory and multidimensional adaptive testing, if applies, estimation of plausible values). The Contractor will collaborate with the Contractor of Core D, should it be different from that of Core A, on the development of specific scaling methodology needed to provide reliable, valid and comparable indicators. Bidders are asked to indicate the overall cost for this task for the main survey and separate additional costing for each module.

216. The key outputs of Task A9 are:
- a list of scales to be included in the final datasets
- transparent scaling procedures and scale validation procedures to be developed in close consultation with the QEG, the TAG and the OECD Secretariat to meet reporting needs
• software codes used to construct and validate scales.

1.4.10. Task A10: Production of the technical report and user guide

217. A technical report will be developed and published covering all aspects of the survey (including each of the target samples and survey components undertaken). The Contractor shall provide the OECD Secretariat with a copy of a comprehensive technical report by the date indicated in the agreed timeline. This report shall summarise and clearly describe all data and statistical conventions or approaches applied in each of the target samples and for any survey components undertaken. The technical report should serve the needs and address the likely questions of the most sophisticated users of the dataset. It should also provide guidance for future waves of the survey if particular issues and/or difficulties were encountered or identified. The technical report should cover both the main survey and the implemented modules.

218. Bidders should also consider how the approach taken to the TALIS Technical Report in previous cycles could be improved and developed to ensure greater transparency, better understanding of TALIS methodology and more complete or concise information for all stakeholders, including the general public and the media. Previous TALIS technical reports are publically available on the TALIS website\textsuperscript{32}. Bidders should consider the extent to which technical information could be made more fully and flexibly available, for example by supplementing the published report with web-based material. The technical report should be written in such a way that it ensures reproducibility of data manipulations. The Contractor will ensure that the technical report has been thoroughly edited, developed in a format that is compatible with OECD authoring software and written according to the OECD Style Guide.

219. The Contractor will be responsible for developing a user guide that will provide detailed information on how to analyse the TALIS data (including across cycles, across ISCED levels, across target populations and survey components), enabling researchers to both reproduce the initial results and to undertake further analyses. In addition to the inclusion of the necessary techniques, the user guide will also include a detailed account of the TALIS database and examples providing full syntax in two different file formats (e.g. SPSS and STATA). This will encourage further use of the TALIS data by researchers and is similar to what was provided for TALIS 2018.

220. Bidders are asked to budget for the production of these reports and to distinguish costing estimates for the main survey from additional costing for each of the proposed modules.

221. The key product from Task 10 will be:

• TALIS 2024 technical report (in English only)

• TALIS 2024 user guide for the international databases.

1.4.11. Task A11: Support for the preparation of international reports

222. The OECD Secretariat is responsible for the preparation of the reports that will summarise the results of the survey that includes results from the main survey samples (ISCED level 2), and from the survey modules (ISCED 1 and 3 levels, TALIS-PISA link, ISCED 0, novice teachers and TKS assessment) should these modules be undertaken. The purpose of these reports will be to:

• provide the descriptive statistics of the populations surveyed, including the main indicators and associated statistics relevant to the policy and research objectives described in Section 1

• examine how these indicators and relevant statistics interact within and between specified policy issues

\textsuperscript{32} \url{http://www.oecd.org/education/talis/}. 
• examine changes across cycles for each target population (as applicable) and differences across populations (as applicable).

223. To support the preparation of the reports, the Contractor shall:

• develop a memo that highlights the type of analysis that is recommended/not recommended as a consequence of the split-questionnaire design (as applicable)

• provide statistical and technical support for the OECD Secretariat during the development of the reports

• provide feedback and verify basic tables of descriptive results designed and developed by the OECD secretariat

• review the report, tables and drafts of the report for technical consistency and coherence.

224. Responsibility for the production of tables from the international database will be shared between the Contractor and the OECD Secretariat. The Secretariat will be responsible for specifying the number of tables, developing their design and estimating the values. The bidder will be responsible for providing feedback to the table shell design and verify the estimations. The bidder should specify the cost for table verification for a hundred tables and per additional table.

225. Given the level of co-ordination that will be necessary between the OECD Secretariat, participating countries and economies and the Contractor, bidders are reminded of the need to discuss how such co-ordination will be facilitated and managed successfully. One issue that should be addressed in this discussion is the consistency of results in the international and national reports (should countries wish to undertake them). The Contractor cannot guarantee such consistency but should be available to assist those preparing national reports should questions arise about procedures for data analysis, scaling procedures, weighting, software, etc.

226. Bidders are invited to indicate a price for these tasks per OECD report.

227. The key product from Task A11 will be:

• technical support and advice to national centres for the production of their initial reports from the survey in form of a data analysis workshop for example

• review of the initial reports prepared by the OECD

• table verification.

1.4.12. Task A12: Project management

228. The OECD Secretariat will have a significant role in the oversight and management function for TALIS 2024, working together with the Contractor. The Contractor will be required to appoint a senior person to act as the International Survey Director. This person will work closely with the OECD Secretariat to ensure the success of TALIS 2024. He or she will provide leadership for NPMs and the QEG, and to this end should have strong management and team-building skills. The person in this role should also have the academic credibility and experience to provide the intellectual leadership of TALIS among experts, and to work with the Secretariat on identifying technical issues to be discussed by the Technical Advisory Group (TAG). Bidders should name the person who will be carrying out this role, who should be expected to spend the majority of his or her time working on TALIS. Bidders should specify the percentage of time to be spent on the project by the International Survey Director.

229. The Contractor shall deliver a high quality product on time and within budget and therefore needs sufficient authority to implement the main survey and any other survey components that will be undertaken and make decisions on a day-to-day basis concerning all aspects of implementation. The role of the Contractor shall not only be to implement the sampling plan they have developed but also to manage and
co-ordinate all parts of the process during implementation. The Contractor shall have sufficient budget and authority to develop and apply effective quality assurance procedures during the project. Bidders should specify such procedures in their proposals and indicate how they will monitor the effectiveness of these procedures during the life of the contract.

230. Other positions/titles should be described in bidders’ proposals. Additionally, the structure and procedures for working with potential subcontractors, experts and referees should be discussed; including overseeing subcontractors’ work, ensuring accountability and control from a financial as well as a technical perspective, and interactions with them on a more routine basis should be described. Bidders are invited to describe proper measures they will put in place to safeguard the timeliness of survey operations, whether or not they engage sub-contractor(s). Bidders should ensure that subcontractors, in addition to being highly qualified, are drawn from different OECD countries as much as possible.

231. In close collaboration with the Contractor, the Secretariat will be responsible for the following aspects of management and co-ordination of the project:

- ensuring that the TGB is regularly updated on the progress of the project
- providing advice to the TGB on the feasibility and impact of changes to the scope of TALIS 2024 or its implementation, taking into account the issues involved for the Contractor
- ensuring that the decisions of the TGB are implemented; liaising with and advising the Contractor accordingly; ensuring that the Contractor is kept fully informed of any decisions which impact on project structure or timelines
- ensuring that the OECD ECEC Network is included in discussions and decisions about the ISCED 0 module (TALIS Starting Strong)
- ensuring that a project management approach is agreed with the Contractor and is applied to managing the work throughout the project
- overseeing of risks, issues and deviation from timelines; ensuring that risks and issues are regularly monitored and appropriately mitigated and managed
- monitoring the budgets and milestones and resolving budgetary or contractual issues
- establishing and maintaining an archive of all project resources, documents, materials and databases
- providing additional support to National Centres by attending NPM meetings; obtaining regular feedback from NPMs; dealing with any queries or problems which cannot be resolved by liaison with the Contractor.

232. The Contractor will be responsible for facilitating the implementation of the agreed project management approach and for ensuring that the Secretariat is kept fully informed on the progress of the project. This will involve the following:

- establishing tools (e.g. a communication portal) and mechanisms for effective communication with the Secretariat and with national centres
- developing and maintaining an integrated project plan and timeline
- negotiating and resolving timeline amendments, for example those which might arise from TGB requirements, unavoidable operational delays or other unforeseen project changes; keeping the Secretariat fully updated on amendments; informing the Secretariat promptly of any timeline issues which may have implications for achievement of project milestones
- informing the Secretariat promptly of any urgent issues or disputes which may arise
organising regular progress meetings with the Secretariat either face-to-face or online, at agreed intervals; circulating any papers required for meetings; keeping and circulating minutes of all meetings, including agreed action points

• putting in place procedures for monitoring risks; maintenance of a regularly updated risk register and issues log; providing regular updates and heads up on risks, issues and deviations from timelines to the Secretariat that might arise

• collecting and collating information on the feasibility and impact of changes to the scope of TALIS 2024 or its implementation (e.g. countries joining the cycle late), to assist the Secretariat in giving advice to the TGB

• establishing a mechanism for submission of all TALIS resources, documents, materials and databases to the OECD archive, and ensuring that this is kept up-to-date

• discussing additional requests from participating countries with the OECD Secretariat; negotiating and co-ordinating additional national requirements or requests with national centres or TGB members as appropriate. This may in some cases require the identification of additional costs and the establishment of corresponding additional contractual arrangements with countries

• providing regular reports to the Secretariat and the TGB (and the ECEC Network for the ISCED 0 module). The nature and frequency of such reports will be agreed between the Contractor and the Secretariat.

233. The Contractor shall also: i) liaise with the OECD Secretariat to ensure the overall success of the survey; ii) advise the OECD Secretariat about the effects on the international costs of countries that join later, withdraw, or cause delays to the project; and iii) develop a schedule and procedures for the review of national data to ensure their accuracy before these data are provided to participating countries.

234. Bidders should discuss how they will: i) facilitate interaction and ensure effective collaboration among participating countries, the QEG, and other contractors; and ii) ensure effective collaboration with and demonstrate responsiveness to the OECD Secretariat.

235. The potential use of multiple contractors heightens the need for effective co-ordination among all those involved with the survey, including contractors. Accordingly, bidders must discuss: i) their experience that demonstrates relevant and successful co-ordination of large-scale survey projects and/or projects involving multiple countries and contractors; and ii) how their efforts during the period of contract implementation will promote and achieve the co-ordination required to ensure the success of the survey.

236. The Contractor shall manage and implement all tasks associated with the development, administration and data analysis of the main survey and those of any other modules undertaken. This includes accommodating countries that are participating in each and/or all of the target samples and ensuring that the deliverables from each survey component follow similar high-level quality standards. This task highlights the importance of effective management and co-ordination in successfully implementing the survey. In the case of the TALIS-PISA link, this task will also require co-ordination with the PISA sampling contractor and with the group responsible for the development of the PISA teacher questionnaire (should this option be undertaken by the PISA Governing Board).

237. Consideration should be taken of quality control measures and the proposed management structure and techniques. This may include the identification of sampling and methodological issues and a proposal to overcome such issues, and a strategy for collecting the data, while ensuring the comparability of surveys implemented for each target sample and following the timeline detailed in the sampling plan. Bidders are required to identify how they will efficiently implement and co-ordinate surveys for each of the six target populations and manage critical issues during the implementation phase.
238. The Contractor shall be further responsible for recommending to the OECD Secretariat: i) the frequency and location of meetings for the NPMs (see the description for this group below); and, ii) data adjudication. Data adjudication will have to be based on pre-agreed criteria for determining the quality of the samples and collected data. Such criteria will be accompanied by recommendations for the use of country results in OECD reports on advice from the sampling and translation referees.

239. Meetings of the NPMs shall operate in English. The Contractor should also budget for preparing all instruments in both English (British spelling) and French (see Task A4). Working documents and manuals targeted at NPMs shall be prepared in English.

240. The Contractor shall develop a description of the role and profile of NPMs who will facilitate the translation and implementation of the data collection instruments in their country. The Contractor will make sure that instructions and training to NPMs are provided in a timely manner to ensure the success of the project. Bidders should specify their intended working relationships with NPMs and how they will best ensure efficient and high-standards in the work of NPMs. In their proposals, bidders must also propose a timeline for the national implementation of the survey for each of the target samples and instruments including a proposed meeting schedule.

241. In liaison with the OECD Secretariat, the Contractor shall call, organise, and host meetings of NPMs. Four to six such meetings are anticipated during the life of the contract, including two training sessions before the pilot and the main study which the Contractor will be responsible for running. Provisions for meeting facilities as well as for travel and compensation of experts, as required, should be included in bidders’ proposals. No compensation and travel costs for NPMs or representatives from the OECD Secretariat should be included in the cost proposals. Participating countries will bear the costs of their NPMs’ participation in these meetings.

242. Bidders shall present a budget for the overall management of the main survey and separate additional costings for the management of each module. Should the chosen Contractor(s) of Core B, C and/or D be different from the Contractor of Core A, the Contractor for Core A will be responsible for co-ordinating the work across the Contractors, in close co-operation with the OECD.

243. The key products from Task A12 will be:

- effective management of the day-to-day running of the project and communication with relevant stakeholders
- effective short-term and long-term stakeholder management
- National Project Manager manual and description of role
- management and training of NPMs including a schedule of meetings/training sessions
- implementation and co-ordination of the main survey and each of the other modules undertaken, as applicable.

1.5. Core B: Conceptual framework and Instrument development for the optional ISCED 0 module (TALIS Starting Strong)

244. The implementation of the survey covered by Core B can broadly be divided into three main tasks that are listed and then detailed below.

- Task B1: Recruit experts on ECEC for the Questionnaire Expert Group (QEG) and manage related meetings
- Task B2: Production of the TALIS Starting Strong 2024 conceptual framework
• Task B3: Development of the TALIS Starting Strong 2024 questionnaires.

245. In preparing their response to this call for tenders, bidders are invited to systematically discuss how each task will contribute to the success of the module and describe how they fit in the overall design and architecture of the TALIS 2024 project.

1.5.1. Task B1: Recruit experts on ECEC for the Questionnaire Expert Group (QEG) and manage related meetings

246. The Contractor of Core B will recruit experts on ECEC to be part of the Questionnaire Expert Group. These experts shall preferably originate from or have extensive knowledge of the diverse international contexts in which TALIS Starting Strong operates. The Contractor of Core B will coordinate with the Contractor of Core A to determine the number and profiles of ECEC experts to ensure complementarity with other experts of the group and full coverage of the main themes of the survey. The Contractor of Core B will also consult with the OECD Secretariat and the OECD ECEC Network to choose the experts. Participating countries will be asked to suggest experts for this group for consideration by the Contractor. The preparation of questionnaires will follow the approach described in Task A3 of Core A. The experts will advise on the development of a survey design and of questionnaires for TALIS Starting Strong which will meet the requirements for valid measurement on the concepts targeted (as defined in the conceptual framework – see Task B2), provide a reliable estimation of trends over time, and provide relevant insights to the policy questions. Bidders are invited to base the cost of Task B1 under the assumption of three experts and indicate the cost for adding other experts.

247. The Contractor of Core B will manage the meetings of this group during the development of the framework and instruments. One expert on ECEC, as member of the Questionnaire Expert Group (QEG, see Task A1 of Core A), will participate in QEG meetings organised by the Contractor of Core A. In addition, the Contractor of Core B will organise separate meetings where TALIS Starting Strong design features and content are discussed with ECEC experts and other members of the QEG. Bidders should propose ways to plan and organise meetings of the QEG to discuss questionnaires for TALIS Starting Strong so as to enable synergies with meetings for the main survey or for the ISCED 1 module. The Contractor will have to coordinate with the Contractor of Core A for the management and scheduling of meetings of the QEG. Bidders should indicate the cost for recruiting and managing the additional experts required for the ECEC sector as well as for the organisation of separate meetings on TALIS Starting Strong.

248. The key product from Task B1 will be:

• recruit additional expert(s) in topics related to the ECEC sector to participate in QEG meetings and manage meetings of the QEG on topics that are specific to the development of the questionnaires of TALIS Starting Strong in close cooperation with the QEG for the main survey.

1.5.2. Task B2: Production of the TALIS Starting Strong 2024 conceptual framework

249. The 2018 cycle of TALIS Starting Strong provided policy-relevant data and analysis on the following key aspects of ECEC settings covered by the Survey:

• process quality (the quality of interactions between staff and children and staff and parents/guardians, as well as among children)
• monitoring of children’s learning, development and well-being
• background and initial preparation of staff and leaders
• professional development for staff and leaders
• staff and leader well-being professional beliefs about children’s learning, development and well-being
- staff self-efficacy
- structural quality (i.e. available physical, human, and material resources), pedagogical and administrative leadership
- climate
- stakeholder relations
- equity and diversity as a cross-cutting focus.

250. The development of the conceptual framework for the second cycle of TALIS Starting Strong will follow a similar approach to the one for the main survey described in Task A2 of Core A. It is expected that the concept paper described in Task A2 of Core A will include specific elements for TALIS Starting Strong 2024 as part of the main directions proposed for TALIS 2024. The conceptual framework should be based on sound theoretical principles and an understanding of the state of the art in the relevant areas (research literature review), as well as a thorough understanding of emerging policy issues in the area of young children learning, development and well-being and of the ECEC sector. The development of the framework should be informed by the concept paper, the TALIS Starting Strong 2018 conceptual framework and the results of a prioritisation process with participating countries to identify indicators (areas) to be kept, changed or added. Bidders shall outline their proposed approach to undertake this prioritisation process. The Contractor is expected to present the draft conceptual framework to the OECD Secretariat, the OECD ECEC Network and the TGB (either in person at the ECEC Network meeting, if timing permits, or via webinar and written procedure through the OECD Secretariat) and provide opportunities for countries and the Secretariat to provide feedback on the document. The TALIS Starting Strong 2018 conceptual framework is available on the survey website: [http://www.oecd.org/education/school/oecd-starting-strong-teaching-and-learning-international-survey.htm](http://www.oecd.org/education/school/oecd-starting-strong-teaching-and-learning-international-survey.htm).

251. The key product from Task B2 will be:
- draft and final versions of the conceptual framework in English.

1.5.3. Task B3: Development of the TALIS Starting Strong 2024 questionnaires

252. The Contractor will work with the QEG to prepare draft versions of the ECEC staff and the leader questionnaires in English. The Contractor will also work with the QEG to investigate the possibility to reduce the number of questionnaires compared to TALIS Starting Strong 2018. In the 2018 cycle, a combined questionnaire was developed for small centres with one teacher and one leader. There were also two slightly different questionnaires for staff and leaders in pre-primary education and those working with children under the age of 3. The impact of this type of changes on the possibility to compute trend variables should be discussed.

253. The second cycle of TALIS Starting Strong should put special emphasis on consolidating items of the TALIS Starting Strong 2018 questionnaire that worked well in the first cycle, including those that could be used for trends analysis, and on revising and refining those that worked less well, including towards improving opportunities for constructing scales. Bidders should also include the possibility for innovations in terms of: 1) areas of coverage and/or 2) techniques to enhance the cross-cultural validity of existing questionnaires. The development of the questionnaires should be informed by the conceptual framework, the TALIS Starting Strong 2018 questionnaires and the results of the prioritisation process with participating countries to identify indicators to be kept, changed or added. The Contractor shall ensure that the overall length of the questionnaires in English and in French is equivalent or shorter than those of TALIS Starting Strong 2018. The Contractor will have to work closely with Contractor for Core A to ensure
alignment of the key concepts and, where relevant, of specific questionnaire items with those developed for the TALIS main survey.

254. The Contractor will provide stakeholders (the OECD Secretariat, the TGB and the OECD ECEC Network representing participating countries) with sufficient opportunities and time to provide feedback on the draft versions of the instruments for the pilot, field trial and main study phases of development. Proposals for including new questions or items and decisions about the appropriate balance between breadth and depth in thematic coverage should be discussed with stakeholders and align with the results of a priority rating exercise of themes and indicators similar to that carried out for TALIS Starting Strong 2018.

255. Bidders should discuss the possibility to introduce a split-questionnaire design as proposed for Core A. The advantages and potential shortcomings of this approach should be weight against maintaining a non-rotating design. The decision of whether to adopt a split-questionnaire design for TALIS Starting Strong 2024 will be independent of the corresponding decision for TALIS 2024. Bidders should elaborate on the feasibility of a split-questionnaire for the ECEC sector and the various implications, in particular with regard to response rates and required sample sizes.

256. If this module is retained, the Contractor of Core B will have to coordinate with the Contractor of Core A to make sure that the format of questionnaires are adapted to other tasks linked to the implementation of the survey.

257. The key products from Task B3 will be:

- in collaboration with the QEG, develop and revise items for ECEC staff and centre leaders questionnaires (and combined questionnaires if needed) following feedback from stakeholders and analyses of pilot and field trial data.

- in collaboration with the QEG, develop a proposal for implementing a split-questionnaire design that allows for adequate sample sizes and coverage of topics while limiting questionnaire length.

- in collaboration with Core A Contractor, prepare laid-out and formatted versions of the ECEC staff and centre leaders questionnaires for each target population (ISCED 02 and children under the age of 3) in English and available in computer and possibly paper versions for the pilot, field trial and main study phases of data collection.

1.6. Core C: Instrument development for the optional survey of novice teachers

258. New questionnaire content and adaptations to the core teacher questionnaire will need to be developed to collect information about novice teachers’ practices and working conditions. Note that this work will affect the work of the Contractor of Core A. Should the chosen Contractor for Core C be different from that of Core A, the Contractor for Core C will be asked to efficiently collaborate with the Contractor of Core A to ensure the smooth development of these optional instruments and their consistent integration with the overall TALIS project.

259. The objective of the optional survey of novice teachers is to identify the specific working conditions, professional practices, induction activities, pre-service and in-service training that drive new teachers’ skills formation, self-efficacy, job satisfaction, retention and well-being over time.

260. Two alternative scenarios are considered for this module: a “cross-sectional scenario” in which novice teachers in different years of their teaching career (e.g. 1st to 2nd year vs 3rd to 4th year) would be surveyed; and a “longitudinal scenario” in which one or two cohorts of teachers in a specific career year (e.g. 1st year and/or 3rd year) would be surveyed over time (with one or two follow-up studies). Bidders on Core C are invited to make working assumptions about the design features of each scenario (target populations, timing of follow-up(s), etc.), and to discuss the analytical potential and limits of each assumed
scenario. Bidders are then invited to make concrete proposals with regards to the development of new questionnaire content and design for both assumed scenarios and to cost them separately.

261. The implementation of the survey covered by Core C can broadly be divided into three main tasks that are listed and then detailed below.

- Task C1: Recruitment and management of an expert in early teaching career
- Task C2: Input to the conceptual framework for content related to early teaching career
- Task C3: Development of new questionnaire content for novice teachers.

262. In preparing their response to this call for tenders, bidders are invited to systematically discuss how each task will contribute to the success of the module and describe how they fit in the overall design and architecture of the TALIS 2024 project.

1.6.1. Task C1: Recruitment and management of an expert in early teaching career

263. The Contractor of Core C will appoint an expert who will sit on the Questionnaire Expert Group (QEG, see Task A1 of Core A), advise the QEG on the conceptual development of issues related to novice teachers (see Task A2 of Core A), and be closely involved in the development of this new content. The recruited expert will participate in the QEG meetings organised by the Contractor of Core A (see Task A1 of Core A). The Contractor of Core C will be ultimately responsible for developing new questionnaire content and adapt the existing questionnaire material.

264. The key product of Task C1 is:
- recruit an expert in topics related to the experience of novice teachers to participate in QEG meetings and be closely involved in the development of new content.

1.6.2. Task C2: Input to the conceptual framework for content related to early teaching career

265. The conceptual framework for this module will be embedded in the broader conceptual framework developed under the responsibility of Contractor A (Task A2). The Contractor of Core C, including its expert(s), will provide input to Core A Contractor on specific issues to be covered.

266. The key product of Task C2 is:
- provide input to the conceptual development of issues related to early teaching career.

1.6.3. Task C3: Development of new questionnaire content for novice teachers

267. New questionnaire content will need to be developed by the Contractor of Core C to collect relevant information to achieve the goal of this module. Content development will be informed by the conceptual framework developed for the main survey and its potential expansion to include conceptualisation of issues relevant to novice teachers’ induction and retention (see Task A2 of Core A). It will also rely heavily on the expertise of the QEG member specialised in early teaching career, who will advise the Contractor of Core C on the development of new content.

268. The Contractor will also collaborate with the Contractor of Core A, should it be different from that of Core C, for including the new content in the main survey teacher questionnaire with an appropriate questionnaire design compatible with the chosen questionnaire design of the main survey (see Task A3 of Core A).

269. In accordance with research on novice teachers, new content could be included to measure the potential mismatch between novice teachers’ job expectations and the reality of it. Novice teachers could also be asked about the most important challenges they face and the most suitable support they receive to
overcome them. Bidders are invited to describe how they will identify relevant topics to be covered and outline what these topics could be.

270. The chosen Contractor will also need to adapt the questions from the core teacher questionnaire for them to address the specific case of novice teachers. In the “cross-sectional scenario”, it could be envisaged to ask retrospective questions about the very first year of teaching for teachers surveyed in an ulterior year. In the “longitudinal scenario”, the follow-up questionnaire would need to include a filter question to ask individuals if they have remained in or left the profession. A short questionnaire would need to be developed to survey former teachers and understand the reasons of their drop-out. Bidders are invited to discuss their working plans for the two distinctive scenarios, including their plans to develop new questionnaire content, adapt existing questionnaire materials to novice teachers and assemble these materials into various instruments. The chosen Contractor of Core C will need to collaborate with that of Core A to identify a suitable questionnaire design for the administration of new questionnaire content to novice teachers in various years of their career and to former teachers (should the longitudinal scenario move forward). Bidders must refer to the description of tasks included in Core A as the development and administration of the optional study of novice teachers will need to follow the same processes, requirements as those described for the main survey. Bidders are invited to provide separate cost estimates for each task of the two scenarios – the cross-sectional and the longitudinal scenarios.

271. The key products from task C2 will be:

- develop new questions on issues related to novice teachers and make adaptations to the main survey teacher questionnaire
- develop a short questionnaire to be administered to former teachers, should the longitudinal scenario be pursued
- in collaboration with the Contractor of Core A, identify a suitable questionnaire design for the administration of new questionnaire content to novice teachers and former teachers (should the longitudinal scenario be undertaken).
- in collaboration with the Contractor of Core A, prepare laid-out and formatted versions of the novice and former teacher questionnaires in English and available in computer and possibly paper versions for the pilot, field trial and main study phases of data collection.

1.7. Core D: Conceptual framework and instrument development for the optional Teacher Knowledge Survey assessment module

272. All procedures and tasks described in Section Core A apply to the TKS assessment module. The following sections detail additional tasks that only apply to the TKS assessment module. This work should build on the Teacher Knowledge Survey as it was developed in CERI (see background document\(^{33}\)). In particular, bidders shall specify how they would build on the TKS conceptual framework and instruments.

273. The implementation of the survey covered by Core D can broadly be divided into three main tasks that are listed and then detailed below.

- Task D1: Establish and manage a Teacher Knowledge Expert Group (TKEG)
- Task D2: Development of the TKS conceptual framework
- Task D3: Development of the TKS instruments.

\(^{33}\) Available with key background materials for bidders in the download section of the call for tenders.
274. In preparing their response to this call for tenders, bidders are invited to systematically discuss how each task will contribute to the success of the module and describe how they fit in the overall design and architecture of the TALIS 2024 project.

1.7.1. Task D1: Establish and manage a Teacher Knowledge Expert Group (TKEG)

275. The Contractor of Core D will establish a small expert group consisting of 2-3 experts on teachers’ pedagogical knowledge assessment (TKEG). Similarly to the Core A TALIS questionnaire, the TKEG will develop a survey design, as further specified in Task D3. The Contractor of Core D will establish the expert group in consultation with the OECD Secretariat and the TGB and in coordination with the Contractor of Core A. Participating countries will also be asked to suggest experts for this group for consideration by the Contractor. The TKEG shall be composed of at least two experts with expertise on assessment and teachers’ pedagogical knowledge.

276. The Contractor of Core D will manage the meetings of this group during the development of the framework and instruments. The TKEG will also be part of the Questionnaire Expert Group (QEG, see Task A1 of Core A), advise the QEG on the conceptual development of issues related to teachers’ knowledge within the main TALIS questionnaire (see Task A2 of Core A). The TKEG will thus participate in the QEG meetings organised by the Contractor of Core A (see Task A1 of Core A).

277. Bidders should propose ways to plan and organise meetings of the TKEG to discuss the TKS instruments so as to enable synergies with meetings for the main survey and the novice teachers module (if applicable). The Contractor of Core D will have to coordinate with the Contractor of Core A for the management and scheduling of meetings of the TKEG and QEG. Bidders should indicate the cost for recruiting and managing the TKEG.

278. The key products from Task D1 will be:

- establishing the TKEG with expert(s) in topics related to the TKS assessment
- effective management of the day-to-day running of the TKEG and communication with relevant stakeholders
- management and schedule of meetings of the TKEG and coordination with the Contractor of Core A with regards to meetings of the QEG for the main survey.

1.7.2. Task D2: Development of the TKS conceptual framework

279. The TKS as developed in CERI was designed to provide policy-relevant data and analysis on the following key aspects of teacher quality (more information regarding these components can be found in the background document):

- an assessment of the general pedagogical knowledge of teachers (also applicable for novice teachers)
- a report of opportunities to learn (OTL) pedagogy (in initial teacher education and continuous professional development)
- self-reported motivational and affective competencies
- self-reported teaching practices.

280. The development of the conceptual framework for the TKS will follow a similar approach to the one for the main survey described in Task A2 of Core A. It is expected that the concept paper described in Task A2 of Core A will include specific elements for the TKS assessment module. The conceptual framework should be based on sound theoretical principles and an understanding of the state of the art in the relevant areas (research literature review), as well as a thorough understanding of emerging policy
issues regarding teacher quality and teachers’ pedagogical knowledge. The Contractor of Core D will make sure that the conceptual framework that integrates the core TALIS survey and the TKS assessment module appropriately contextualises teachers’ general pedagogical knowledge and distinguishes important content areas and types of teacher knowledge. The Contractor of Core D is therefore encouraged to develop this framework using the conceptual framework developed in CERI. In particular, teachers’ self-reported opportunities to learn, motivational and affective characteristics and teaching practices are relevant to understand their knowledge base. The development of the framework should further be informed by the concept paper and further relevant work in CERI such as publications regarding teachers’ general pedagogical knowledge, the review conducted with pilot countries in 2015, the report on the pilot TKS, as well as the revisions that have taken place since the pilot (the Contractor of Core D will have access to all materials of the TKS developed in CERI, including the assessment instruments).  

281. Should the novice-teacher option go forward, the Contractor of Core D should also include relevant concepts and constructs for this target population in the conceptual framework. For example, aspects of induction, mentoring and other early career support mechanisms can be relevant for novice teachers.  

282. The Contractor of Core D will develop an assessment framework (building on the CERI TKS instruments) that distinguishes important content areas and types of teacher knowledge. Bidders should also include the possibility for innovations in terms of: 1) areas of coverage and/or 2) techniques to enhance the cross-cultural validity of existing instruments. For example, the Strategic Advisory Group to the TKS project in CERI has identified some additional areas in which development of new items are desirable, which the bidders are invited to consider. These include the measurement of teachers’ technological pedagogical knowledge and their knowledge of teaching diverse classrooms.  

283. The Contractor of Core D will be required to assess the external validity of the conceptual and assessment frameworks. This can involve for example, addressing how the conceptual framework relates to diverse national standards and curricula and consulting with relevant stakeholders such as teacher education institutions and experts. Bidders should describe in detail their proposals for this investigation of the validity of the framework.  

284. The key products from Task D2 will be:  
- draft and final versions of the conceptual framework in English  
- draft and final versions of the assessment framework in English.  

1.7.3. Task D3: Development of the TKS instruments  

285. The Contractor of Core D will work with the TKEG to develop a survey design for the TKS which will meet the requirements for valid measurement on the concepts targeted (as defined in the conceptual framework), and provide relevant insights to the policy questions. The development of the instruments should be informed by the conceptual framework and the TKS instruments developed in CERI.  

Assessment of teachers’ general pedagogical knowledge  

286. The Contractor of Core D will develop an assessment instrument of teachers’ general pedagogical knowledge based on the assessment framework and building on the instrument developed in CERI. The same assessment instrument should be used for all target populations: ISCED 2 teachers and the optional population of novice teachers.  

---

34 The publications and a description of the assessment instruments, are available with key background materials for bidders in the download section of the call for tenders.
**Contextual factors: opportunities to learn, affective-motivational competences, teaching practices**

287. Regarding the development and measurement of concepts and constructs that are necessary to contextualise the knowledge assessment results (opportunities to learn, motivational and affective competencies and teaching practices), the Contractor of Core D will have to work closely with Contractor for Core A to ensure the adequate integration of the TKS assessment module into the TALIS main survey and the exploitation of synergies between the two. It is therefore necessary to discuss and coordinate how these elements can be measured:

- within the TALIS main questionnaire by using existing overlaps (i.e. constructs or similar constructs relevant for the TKS assessment module and the main TALIS survey) or aligning the Surveys (e.g. elements of TKS instruments that can be adapted and used for the TALIS main questionnaire)
- within the TKS assessment module in addition to knowledge assessment (for essential constructs that cannot be included in the TALIS main questionnaire).

288. Should the novice teachers module (Core C) go forward and in case countries are interested to implement the TKS for this target population as well, the Contractor of Core D should also work in collaboration with the Contractor of Core C to ensure the adequate contextualisation of the knowledge assessment results for the novice teacher target group. The same coordination is necessary as described above.

**School-level factors**

289. The Contractor of Core D will also consider school-level factors that are relevant to contextualise teachers’ knowledge and how these could be integrated in the main survey principal questionnaire. Such collective properties could cover areas such as strategies and practices for leading and facilitating professional learning, teacher collaboration and other forms of knowledge management, leading innovation and change, partnerships across schools and with other organisations and actors, etc.

**Development procedures**

290. Following the above steps, the Contractor of Core D will prepare a full set of instruments described above based on the draft version of the TKS assessment framework, i.e. the assessment component, as well as the necessary contextual questions that are not part of the TALIS main survey questionnaire. This should be done for the main target population (teachers at ISCED 2 level), and the optional population (novice teachers) should this go forward. After the receipt of comments from the TGB and the OECD Secretariat, the Contractor of Core D, in collaboration with the TKEG, will revise and complete the draft versions of the instruments before each operational phase: the pilot phase, the field trial and the main study.

291. Bidders should describe their proposed processes for test development and investigation of validity, as well as for investigation of the suitability, cultural appropriateness and validity of test items during the course of their development, for example through use of cognitive laboratory investigations, focus groups or small-scale trialling of items with teachers as part of this process. Bidders should describe their approach to this and should specify the extent of prototype item development and item trialling (e.g. cognitive laboratory activities) they have included in their bid. The Contractor of Core D will work with the QEG and the Contractor of Core A to perform translatability checks on the instruments of the TKS assessment module.

292. The Contractor of Core D will develop appropriate scoring methods for assessment items. While multiple choice items that necessitate one correct answer that is clearly justifiable based on research evidence can be suited to assess theoretical/scientific knowledge, a binary scale is less appropriate for measuring practice-based knowledge. Bidders shall propose scoring methods that allow for mapping the
spectrum of options for teaching in the classroom. For example, using Likert-scales (e.g. for judging the effectiveness of certain teaching approaches) and comparing respondents’ answers to answers of a designated board of experts. Bidders shall also explain how they would conduct such scoring and estimate its costs.

293. The Contractor of Core D shall ensure that the overall length of the TKS assessment module (including the assessments and contextual questionnaires) is reasonable with a target response time of ideally not exceeding 30 minutes. For the TKS assessment module, bidders should propose the optimal duration of the assessment and questionnaires within the constraints imposed by the project (not more than 30 minutes in total). Collaboration between the TKEG (Contractor of Core D) and the Contractor of Core A is crucial to exploit synergies with the TALIS core survey to a maximum to minimise the duration of the TKS assessment module. Bidders should also describe their proposed approach for carrying out the assessment (including the questionnaires) in practical terms, for example, which one will be administered first, under what conditions, etc. The only mode of administration of the Teacher Knowledge Survey will be by computer. The Contractor of Core D will coordinate with the Contractor of Core A to make sure that the data capture software has appropriate functionalities to administer a timed assessment.

294. Given that the TALIS main survey and the TKS assessment module together constitute a demanding questionnaire, the Bidder shall propose strategies to make it feasible for teachers to respond and maximise response rates. Such strategies can include not administering the full questionnaire (main survey + TKS assessment module) in one sitting, and integrating to the extent possible the TKS contextual questionnaires into the TALIS main survey questionnaire to reduce the length of the TKS assessment module. Such strategies should not have a negative effect on survey validity, i.e. the assessment should not influence response to the questionnaire and vice versa.

295. As for the TALIS main survey, the Contractor will discuss the feasibility of an incomplete block design for the TKS assessment module and the various implications, including in terms of sample sizes. A rotated design was used in the TEDS-M study to assess teacher knowledge, so that each person had to respond to only two thirds of all test items, thus increasing the material that is covered in total, but decreasing the number of teacher responses on each question with some implications for analysis and reporting. Bidders are asked to consider how the possibilities afforded by computer-based delivery could be exploited to widen coverage of the assessment, without either increasing the overall response time or causing undue complications in analysis and reporting. Bidders should describe how they would propose to develop and extend the assessment by further exploiting the possibilities of the computer-based mode. This may include, for example, increased use of adaptive testing to enable fuller assessment of teacher knowledge.

296. Should the optional target population of novice teachers be undertaken, the Contractor of Core D shall follow the same procedure of survey instrument development and validation for this population. Although some questionnaire items will likely remain constant across populations, it is likely that some minor adaptations will be needed for the novice teacher target population.

297. Translation and national adaptations will be required for all components of the Teacher Knowledge Survey for the pilot, field trial and main study phases. This part of the work is described in Section Core A, Task A4, and should not be costed by Core D bidders. However, Core D bidders should describe their approach that are specific for piloting, implementing and scaling the assessment (e.g. scoring, adaptive testing, block design), as well as their approach to related training and advisory tasks (e.g. proposing experts and training them to score the assessment items).

298. The key products from Task D3 will be:

- develop items for the Teacher Knowledge Survey assessment module including the assessment and the contextual questionnaires for teachers and possibly school principals (to the extent possible integrated in
the TALIS main survey questionnaire), and revise them following feedback from stakeholders and analyses of pilot and field trial data

- develop a version of the TKS assessment module instruments with minor adaptations for the optional population of novice teachers, should this be undertaken
- define a suitable questionnaire design for the TKS (e.g. incomplete block design, adaptive testing) to allow for sufficient coverage of topics while limiting questionnaire length and sample size
- in collaboration with the Contractor of Core A, produce laid-out and formatted versions of the TKS questionnaires for teachers (ISCED 2), and for the optional target population of novice teachers if this is undertaken in English and available in computer version for the pilot, field trial and main study phases of data collection
- develop guidelines on piloting, implementation and scaling of the TKS assessment module.

1.8. Section 3: Personal data protection

299. The work to be performed under the contract will entail the processing of information relating to identified or identifiable individuals (“personal data”).

300. Very high standards of personal data protection are expected from the Contractor. The OECD strongly recommends that bidders seek legal advice on personal data protection issues prior to submitting their bids.

301. It is important to note that, as an independent intergovernmental organisation, the OECD is not subject to any national or regional legislation. The only rules governing personal data protection that are directly applicable to the OECD are its internal regulations on data protection. They are currently set out in the Decision of the Secretary-General on the protection of individuals with regard to the processing of their personal data (the “Decision”), Annex XII of the Staff Regulations, Rules and Instructions applicable to Officials of the Organisation. A copy of the Decision is publicly available at: https://www.oecd.org/general/OECD-Decision-Processing-Personal-Data.pdf. The processing by the OECD of any Personal Data transferred to the OECD under the contract will be carried out in accordance with the Decision.

302. The bidders should be able to demonstrate willingness and ability to comply with the requirements for a data processor under applicable legislation, i.e. the Decision and any specific national legislations applicable to TALIS participants and to contractors, including but not limited to the General Data Protection Regulation (where applicable), hereinafter “the Applicable Data Protection Regulation”.

303. In particular, but without limiting the generality of the foregoing, the Contractor must warrant that:

- it will only process the Personal Data for the purposes of performing the Contract;
- it will only process Personal Data on instructions from the OECD, and inform the OECD if it believes that the instructions infringe on the Applicable Data Protection Regulation;
- it will ensure appropriate protection of Personal Data. In particular, the Contractor will take appropriate technical and organisational measures to ensure a level of security reasonably appropriate to the risk, taking into consideration the risks inherent in any processing and the nature of the concerned Personal Data;
- it will (i) limit access to the Personal Data to its personnel who has a business need to access such Personal Data and has committed to confidentiality or is under an appropriate statutory obligation of confidentiality (ii) ensure that such personnel access the Personal Data using access control measures agreed with the OECD;
it will obtain prior written permission from the OECD before engaging a sub-processor, require all authorised sub-processors to abide, by written agreement, by the same level of data protection and security as the Contractor under the contract and assume full liability for failures of sub-processors to meet the contract requirements and/or Applicable Data Protection Regulation;

upon request, it will send promptly to the OECD a copy of any sub-processor agreement it concludes under the contract. Should the contract for sub-processing contain commercial information, the Contractor may remove such commercial information;

at the choice of the OECD and upon request, it will delete or return all Personal Data to the OECD at the end of the contract;

it will promptly notify and transfer to the OECD of any request received directly from the data subjects without responding to that request and assist the OECD (and/or the TALIS participant) to meet its obligations to respond to data subject requests, taking into account the nature of processing and the information available to the Contractor;

any data subject who is not able to bring a claim against the OECD, arising out of a breach by the Contractor or its sub-processor(s) of any of their obligations referred to above, may issue a claim against the Contractor;

it will maintain a record of all processing of Personal Data under the contract.

The Contractor must permit the Organisation or any third party auditor appointed by the Organisation, upon reasonable notice, to inspect and audit the contractor’s processing activities, and comply with all reasonable requests or directions by the OECD to enable the Organisation to verify and/or ensure that each contractor is in compliance with its obligations under the contract. Any third party auditor appointed by the Organisation must execute a written confidentiality agreement if requested by the contractor or otherwise be bound by a statutory confidentiality obligation before conducting the audit.

The Contractor must notify the OECD as soon as possible (and in any event within a period not exceeding 48 hours) after becoming aware of any actual or suspected breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, theft of, or access to, Personal Data transmitted, stored or otherwise processed (“Personal Data Breach”) or any other security incident impacting the Personal Data.

This notification shall be made by phone or email and confirmed by a registered letter with proof of receipt. It should describe (i) the nature and cause of the Personal Data Breach or security incident, and its effects (or likely effects) (ii) the corrective actions implemented in order to remedy such breach and/or security incident and to minimise the impact on data subjects, and (iii) the measures implemented in order to prevent similar breaches and/or security incidents from occurring in the future.

The Contractor must promptly investigate any Personal Data Breach and/or security incident in order to remedy any breach and/or security incident and avoid any similar breach and/or security incident from occurring in the future. The Contractor must remedy these breaches and/or security incidents as soon as possible and to minimise the impact of such breaches and/or security incidents on all relevant data subjects.

Personal Data Breach or any other security incident impacting the Personal Data may impose obligations on the OECD and/or the PISA participants, including notifications to the data subject. The Contractor must cooperate with the OECD and/or the TALIS participants; and enable the OECD and/or the TALIS participants to fulfil such obligations.

Upon written request and subject to the OECD’s written approval, all contractors shall enter into an appropriate data transfer agreement with any TALIS participant for the transfer of Personal Data (such as, but not limited to, the “EU Standard Contractual Clauses”).
1.9. Section 4: Schedule

310. A general timeline for the development and implementation of the whole TALIS 2024 programme as well as indicative timelines for each of the Cores have been included in this document. Although the fourth cycle of the TALIS survey is bound by certain predetermined milestones (e.g., field trial in 2023, main study around March-April 2024 in the Northern Hemisphere), the bidders’ expert judgement is sought on the planning, organisation and management of the work they are bidding for. Bidders’ expert judgement is also sought for the timing of the Southern Hemisphere data collection. In previous cycles of TALIS, this data collection occurred between September and December preceding the Northern Hemisphere data collection. However, in PISA, the Southern Hemisphere data collection takes place after the Northern Hemisphere data collection. The timeframe for the project implementation increases with 1 year in the current cycle that makes adjustments possible.

311. Careful consideration should be given to the timing of the data collection. One of the lessons learned from the first three cycles of TALIS was that consideration should be given to building flexibility in the survey windows, especially in cases where periods of data collection are close to school breaks or the end of the school year, which can have a negative impact on participation rates. Bidders should consider this issue and propose viable solutions to facilitate incorporating a certain level of flexibility in the survey window. Bidders should also consider how the implementation of international options/modules (ISCED 0, novice teachers, TKS assessment module) affects the timing of the data collection. For example, the integrated conceptual and analytical work of the TALIS main survey and the TKS assessment module make it necessary for these to be in the field at the same time, while it is not necessarily required to complete the questionnaires in one sitting. It will be critical for the success of the overall TALIS 2024 programme to have survey components’ content prepared by Contractors B to D finalised in time to get it programmed into the Core A Contractor’s system.

312. Bidders should include in their proposal a detailed schedule of deliverables. This should include a schedule of activities and milestones that describes when materials would be completed, including the drafts of relevant materials. It is allowed that bidders propose an alternative timeline to that presented here. If this occurs, bidders should specify and provide a rationale for deviations in their schedule. Consideration should also be given to the time required by NPMs to complete required tasks. The following indicative timeline contains only selected major milestones, whereas the project plans submitted by bidders should cover the totality of the activities that relate to the terms of reference. Again, in addition to the TALIS main survey, bidders shall propose a schedule for the deliverables related to all international modules.

313. The following table provides a general indicative timeline of the TALIS milestones that will occur during the 2024 cycle. Bidders must also consult timelines for each of the Cores included below. Bidders should note that these timelines are indicative and will need to be revised, should the situation relative to COVID-19 or other exceptional circumstances require it.

314. For reference, the abbreviations in the table are as follows:
   - Q1: First quarter of the calendar year (January – March)
   - Q2: Second quarter of the calendar year (April – June)
   - Q3: Third quarter of the calendar year (July – September)
   - Q4: Fourth quarter of the calendar year (October – December)
<table>
<thead>
<tr>
<th>Quarter</th>
<th>Events</th>
<th>TGB and NPM Meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2020</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>Call for tenders for international contractor</td>
<td></td>
</tr>
<tr>
<td>Q3</td>
<td>Review of tenders Selection of Contractor</td>
<td>7th Meeting of TGB</td>
</tr>
<tr>
<td>Q3</td>
<td>Contract in place Establishment of QEG and TAG Concept paper on TALIS 2024 content</td>
<td></td>
</tr>
<tr>
<td>Q4</td>
<td>Concept paper on TALIS 2024 content</td>
<td>8th Meeting of TGB</td>
</tr>
<tr>
<td><strong>2021</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td>Conceptual framework</td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>Conceptual framework Questionnaire Development</td>
<td>9th Meeting of TGB</td>
</tr>
<tr>
<td>Q3</td>
<td>Questionnaire Development</td>
<td>1st Meeting of TALIS 2024 NPMs</td>
</tr>
<tr>
<td>Q4</td>
<td>Agreement on Pilot instruments</td>
<td>10th Meeting of TGB</td>
</tr>
<tr>
<td><strong>2022</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td>Pilot Study</td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3</td>
<td>Agreement on Field Trial instruments</td>
<td>11th Meeting of TGB 2nd Meeting of TALIS 2024 NPMs</td>
</tr>
<tr>
<td>Q4</td>
<td>Field Trial S. Hemisphere</td>
<td>12th Meeting of TGB</td>
</tr>
<tr>
<td><strong>2023</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td>Field Trial N. Hemisphere</td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>Agreement on Main Study instruments</td>
<td>13th Meeting of TGB 3rd Meeting of TALIS NPMs</td>
</tr>
<tr>
<td>Q3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4</td>
<td>Main Study S. Hemisphere</td>
<td></td>
</tr>
<tr>
<td><strong>2024</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>Main Study N. Hemisphere</td>
<td>14th Meeting of TGB 4th Meeting of TALIS NPMs Data adjudication meeting</td>
</tr>
<tr>
<td>Q3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2025</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2</td>
<td>Release of TALIS 2024 international databases Launch of initial reporting Release of technical report</td>
<td>15th Meeting of TGB 5th Meeting of TALIS NPMs (workshop)</td>
</tr>
<tr>
<td>Quarter</td>
<td>Events</td>
<td>TGB and NPM Meetings</td>
</tr>
<tr>
<td>---------</td>
<td>-------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Q3</td>
<td>Release of user guide</td>
<td>16th Meeting of TGB</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task</th>
<th>Title</th>
<th>Key output</th>
<th>Preliminary delivery date</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1</td>
<td>Establish, manage and chair the Questionnaire Expert Group (QEG)</td>
<td>establishment of the QEG</td>
<td>Q3 2020</td>
</tr>
<tr>
<td></td>
<td></td>
<td>effective management of the day-to-day running of the QEG and communication with relevant stakeholders</td>
<td>ongoing until Q3 2023</td>
</tr>
<tr>
<td></td>
<td></td>
<td>management and schedule of meetings</td>
<td>on-going until Q3 2023</td>
</tr>
<tr>
<td>A2</td>
<td>Production of the TALIS 2024 concept paper and conceptual framework</td>
<td>development of the concept paper on TALIS 2024 content in English</td>
<td>Q3 2020 to Q1 2021</td>
</tr>
<tr>
<td></td>
<td></td>
<td>draft conceptual framework in English</td>
<td>Q2 2021</td>
</tr>
<tr>
<td></td>
<td></td>
<td>final version of the conceptual framework in English (post field trial)</td>
<td>Q2 2023</td>
</tr>
<tr>
<td>A3</td>
<td>Development of the main survey questionnaires</td>
<td>in collaboration with the QEG, develop and revise items for the teacher and principal questionnaires following feedback from stakeholders and analyses of pilot and field trial data</td>
<td>Q2-2021 to Q3 2023</td>
</tr>
<tr>
<td></td>
<td></td>
<td>define a suitable questionnaire design (e.g. split-questionnaire design) to allow for sufficient coverage of topics while limiting questionnaire length and sample size</td>
<td>Q1 2022</td>
</tr>
<tr>
<td>A4</td>
<td>Translation, translation plans and verification</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>laid-out and formatted versions of the teacher and school principal questionnaires for each target population in English and available in computer and possibly paper versions for the field trial and main study phases of data collection</strong></td>
<td>ongoing until Q3 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>French translation and verification of the source questionnaires</strong></td>
<td>Q2 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>proposal for nominating the translation and adaptation referee</strong></td>
<td>Q4 2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>management of the nominated referee</strong></td>
<td>ongoing during contract</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>glossary, annotated questionnaires, training manuals and translators’ guide to guide national centres in their translation tasks (in English only)</strong></td>
<td>Q4 2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>management of relationship with NPMs to deliver timely, efficient and accurate translation of data collection materials</strong></td>
<td>ongoing during contract</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>quality control measures, technical standards and management of translation processes</strong></td>
<td>Q2 2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>management of translation verification</strong></td>
<td>Q1 2022 to Q3 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>translation report to support translation refereeing and data adjudication.</strong></td>
<td>Q2 2024</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>A5</strong></td>
<td>Development and maintenance of computer platform</td>
<td>development and maintenance of a computer-based platform</td>
<td>ongoing during contract</td>
</tr>
<tr>
<td></td>
<td></td>
<td>provision of trouble-shooting support to users on a 24/7 basis during data collection periods</td>
<td>Q4 2022 to Q1 2024</td>
</tr>
<tr>
<td></td>
<td>Sampling</td>
<td>proposal for nominating the sampling referee</td>
<td>Q4 2020</td>
</tr>
<tr>
<td></td>
<td></td>
<td>management of the nominated referee</td>
<td>ongoing during contract</td>
</tr>
<tr>
<td></td>
<td></td>
<td>sampling plans for the field trial and the main study for all target populations of the main survey and the undertaken modules, as applicable</td>
<td>Q4 2021</td>
</tr>
<tr>
<td></td>
<td></td>
<td>sampling manuals and training manuals (in English) for national centres</td>
<td>Q4 2021</td>
</tr>
<tr>
<td></td>
<td></td>
<td>sampling standards, quality control procedures, and preparation of materials to support sample refereeing and adjudication process</td>
<td>Q2 2022</td>
</tr>
<tr>
<td></td>
<td></td>
<td>sampling weights for the main study for all target populations, as applicable</td>
<td>Q2/Q3 2024</td>
</tr>
<tr>
<td></td>
<td></td>
<td>input in the instrument and item development to ensure they shall be achieved within the sampling framework</td>
<td>ongoing until Q3 2023</td>
</tr>
<tr>
<td></td>
<td></td>
<td>review and revision of guidelines for conducting non-response bias analysis</td>
<td>Q2 2023</td>
</tr>
<tr>
<td>A7</td>
<td>Survey operations and quality control</td>
<td>input into analysis and reporting, especially in relation to the implications of the split-questionnaire design on analysis, should it be adopted</td>
<td>ongoing during contract</td>
</tr>
<tr>
<td></td>
<td></td>
<td>sampling report to support sampling refereeing and adjudication (in English only).</td>
<td>Q3 2024</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TALIS 2024 technical standards</td>
<td>Q2 2022</td>
</tr>
<tr>
<td></td>
<td></td>
<td>co-ordinator manuals for both school co-ordinators and ECEC centre co-ordinators</td>
<td>Q3 2021</td>
</tr>
<tr>
<td></td>
<td></td>
<td>strategies aimed at assisting countries in attaining acceptable response rates, with procedures specific to both a school context and an ECEC context</td>
<td>Q3 2021</td>
</tr>
<tr>
<td></td>
<td></td>
<td>data capture software (with accompanying documents), including tools to support national centres in the real time monitoring of response rates during survey implementation</td>
<td>Q3 2022</td>
</tr>
<tr>
<td></td>
<td></td>
<td>quality assurance procedures and management</td>
<td>ongoing until Q2 2024</td>
</tr>
<tr>
<td></td>
<td></td>
<td>national quality control monitor manual</td>
<td>Q2 2022</td>
</tr>
<tr>
<td></td>
<td></td>
<td>quality monitoring reports on survey procedures and quality assurance procedures for the pilot, the field trial and the main study.</td>
<td>ongoing until Q2 2024</td>
</tr>
<tr>
<td>A8</td>
<td>Data processing</td>
<td>data verification rules and procedures</td>
<td>Q3 2023</td>
</tr>
<tr>
<td></td>
<td></td>
<td>cleaned databases</td>
<td>Q3 2024</td>
</tr>
<tr>
<td>A9</td>
<td>Data scaling</td>
<td>a list of scales to be included in the final datasets</td>
<td>Q2 2023</td>
</tr>
</tbody>
</table>
transparent scaling procedures and scale validation procedures to be developed in close consultation with the QEG, the TAG and the OECD Secretariat to meet reporting needs

software codes used to construct and validate scales.

<table>
<thead>
<tr>
<th>A10</th>
<th>Production of the technical report and user guide</th>
<th>TALIS 2024 technical report (in English only)</th>
<th>Q2 2024</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>user guide for the international database.</td>
<td>Q2 2025</td>
</tr>
</tbody>
</table>

| A11  | Support for the preparation of international reports | technical support and advice to national centres for the production of their initial reports from the survey in form of a data analysis workshop for example | ongoing during contract |
|      |                                                   | review of the initial reports prepared by the OECD | Q2 2025 |
|      |                                                   | table verification. | Q1 2025 |

<p>| A12  | Project management | effective management of the day-to-day running of the project and communication with relevant stakeholders | ongoing during contract |
|      |                   | effective short-term and long-term stakeholder management | ongoing during contract |
|      |                   | National Project Manager manual and description of role | Q4 2020 |
|      |                   | management and training of NPMs including a schedule of meetings/training sessions | ongoing during contract |
|      |                   | implementation and co-ordination of the main survey and each of the other survey components undertaken, as applicable. | ongoing during contract |</p>
<table>
<thead>
<tr>
<th>Task</th>
<th>Title</th>
<th>Key output</th>
<th>Preliminary delivery date</th>
</tr>
</thead>
<tbody>
<tr>
<td>B1</td>
<td>Recruit experts on ECEC for the Questionnaire Expert Group (QEG) and manage related meetings</td>
<td>recruit additional expert(s) in topics related to the ECEC sector to participate in QEG meetings. manage meetings of the QEG on topics that are specific to the development of the questionnaires of TALIS Starting Strong in close cooperation with the QEG for the main survey.</td>
<td>Q3 2020 ongoing until Q3 2023</td>
</tr>
<tr>
<td>B2</td>
<td>Production of the TALIS Starting Strong 2024 conceptual framework</td>
<td>draft version of the conceptual framework in English. final version of the conceptual framework in English.</td>
<td>Q2 2021 3</td>
</tr>
<tr>
<td>B3</td>
<td>Development of the TALIS Starting Strong 2024 questionnaires</td>
<td>in collaboration with the QEG, develop and revise items for ECEC staff and centre leaders questionnaires (and combined questionnaires if needed) following feedback from stakeholders and analyses of pilot and field trial data. in collaboration with the QEG, develop a proposal for implementing a split-questionnaire design that allows for adequate sample sizes and coverage of topics while limiting questionnaire length. laid-out and formatted versions of the ECEC staff and centre leaders questionnaires for each target population (ISCED 02 and children under the age of 3) in English and available in computer and possibly paper versions for the field trial and main study phases of data collection.</td>
<td>Q2 2021 to Q3 2023 Q3 2022 ongoing until Q3 2023</td>
</tr>
<tr>
<td>Task</td>
<td>Title</td>
<td>Key output</td>
<td>Preliminary delivery date</td>
</tr>
<tr>
<td>------</td>
<td>-------</td>
<td>------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>C1</td>
<td>Recruitment and management of an expert in early teaching career participating in QEG meetings and be closely involved in the development of new content</td>
<td>recruit an expert in topics related to the experience of novice teachers</td>
<td>Q3 2020</td>
</tr>
<tr>
<td></td>
<td></td>
<td>manage the recruited expert who will participate in the QEG meetings and give input to the development of new content</td>
<td>ongoing until Q3 2023</td>
</tr>
<tr>
<td>C2</td>
<td>Input to the conceptual framework for content related to early teaching career</td>
<td>provide input to the conceptual development of issues related to early teaching career.</td>
<td>Ongoing until Q2 2023</td>
</tr>
<tr>
<td>C3</td>
<td>Development of new questionnaire content for novice teachers</td>
<td>develop new questions on issues related to novice teachers and make adaptations to the core teacher questionnaire</td>
<td>Q2 2021 to Q3 2023</td>
</tr>
<tr>
<td></td>
<td></td>
<td>collaborate with the Contractor of Core A to identify a suitable questionnaire design for the administration of new questionnaire content to novice teachers and former teachers (should the longitudinal scenario be undertaken).</td>
<td>Q1 2022</td>
</tr>
<tr>
<td></td>
<td></td>
<td>In collaboration with the Contractor of Core A, prepare laid-out and formatted versions of the novice and former teacher questionnaires in English and available in computer and possibly paper versions for the field trial and main study phases of data collection.</td>
<td>ongoing until Q3 2023</td>
</tr>
<tr>
<td>Task</td>
<td>Title</td>
<td>Key output</td>
<td>Preliminary delivery date</td>
</tr>
<tr>
<td>------</td>
<td>----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>D1</td>
<td>Establish and manage a Teacher Knowledge Expert Group (TKEG)</td>
<td>establishing the TKEG with expert(s) in topics related to the TKS assessment effective management of the day-to-day running of the TKEG and communication with relevant stakeholders management and schedule of meetings of the TKEG and coordination with the Contractor of Core A with regards to meetings of the QEG for the main survey</td>
<td>Q3 2020</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ongoing until Q3 2023</td>
<td></td>
</tr>
<tr>
<td>D2</td>
<td>Development of the TKS conceptual framework</td>
<td>draft and final versions of the conceptual framework in English draft version of the assessment framework in English. final version of the assessment framework in English.</td>
<td>Q1 and Q2 2021</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Q2 2021</td>
<td>Q2 2023</td>
</tr>
<tr>
<td>D3</td>
<td>Development of the TKS instruments</td>
<td>develop items for the Teacher Knowledge Survey assessment module including the assessment and the contextual questionnaires for teachers and possibly school principals (to the extent possible integrated in the TALIS main survey questionnaire), and revise them following feedback from stakeholders and analyses of pilot and field trial data</td>
<td>Q2 2021 to Q3 2023</td>
</tr>
<tr>
<td>Task</td>
<td>Timeline</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------------------</td>
<td>----------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>develop and revise items for the optional population of novice teachers for the Teacher Knowledge Survey assessment module, should this be undertaken</td>
<td>Q2 2021 to Q3 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td>define a suitable questionnaire design for the TKS (e.g. incomplete block design) to allow for sufficient coverage of topics while limiting questionnaire length and sample size</td>
<td>Q1 2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>in collaboration with the Contractor of Core A, produce laid-out and formatted versions of the TKS questionnaires for teachers (ISCED 2), and for the optional target population of novice teachers if this is undertaken in English and available in computer version for the field trial and main study phases of data collection.</td>
<td>Q3 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td>develop guidelines on piloting, implementation and scaling of the TKS assessment module</td>
<td>ongoing during contract</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.10. Section 5: Guidelines for bidders and evaluation criteria

315. Candidates are requested to submit separately their technical and financial proposals. The proposals shall respect the requirements indicated below and must be submitted before expiration of the deadline.

1.10.1. Specific requirements for technical proposal

316. Bidders must discuss their experience that demonstrates (i) relevant and successful project in these areas, involving multiple countries; and (ii) how their efforts during the period of contract implementation will promote and achieve the co-ordination required to ensure the success of TALIS 2024 main survey and of its modules.

317. Bidders on Core A are required to submit a total of no more than 90 pages (excluding CVs, minimum font size: 11) following the below outline for their technical proposal:

1) Introduction (max 5 pages)

2) Project approach and processes (max 60 pages)

a) Task A1: Establish, manage and chair the Questionnaire Expert Group (QEG)

b) Task A2: Production of the TALIS 2024 concept paper and conceptual framework

c) Task A3: Development of the main survey questionnaires

d) Task A4: Translation, translation plans and verification

e) Task A5: Development and maintenance of computer platform

f) Task A6: Sampling

g) Task A7: Survey operations and quality control

h) Task A8: Data processing

i) Task A9: Data scaling

j) Task A10: Production of the technical report and user guide

k) Task A11: Support for the preparation of international reports

l) Task A12: Project management

m) Analysis of TALIS 2024 project design and architecture and expertise with content

a. Analysis of the technical design of TALIS 2024 and its complexity (methodological and technical complexities, timeline constraints, working with many and diverse countries, working with many experts, working with several contractors)

b. Expertise with the survey themes

c. Analysis of risks to the project implementation and proposals for risk mitigation

d. Proposed innovation and efficiency gains
3) Description of bidding organisation (max 15 pages)
   a) Organisational structures and capacities
   b) Overview of key staff
   c) Short outline of past projects of a similar nature

4) A detailed schedule of deliverables, including a schedule of activities and milestones that describes when materials would be completed, including the drafts of relevant materials (max 5 pages).

5) Conclusion (max 5 pages).

318. Bidders on Core B are required to submit a total of no more than 30 pages (excluding CVs, minimum font size: 11) following the below outline for their technical proposal:

1) Introduction (max 3 pages)

2) Project approach and processes (max 20 pages)
   a) Task B1: Recruit experts on ECEC for the Questionnaire Expert Group (QEG) and manage related meetings.
   b) Task B2: Production of the TALIS Starting Strong 2024 conceptual framework
   c) Task B3: Development of the TALIS Starting Strong 2024 questionnaires
   d) Analysis of the project design and architecture and expertise on content
      a. Analysis TALIS 2024 governance and priorities
      b. Analysis the complexity of TALIS (methodological and technical complexities, timeline constraints, working with many and diverse countries, working with many experts, working with several contractors)
      c. Analysis of the technical specificities of the ISCED 0 module
      d. Expertise with the themes of the ISCED 0 module

3) Description of bidding organisation (max 5 pages)
   a) Organisational structures and capacities
   b) Overview of key staff
   c) Short outline of past projects of a similar nature

4) A detailed schedule of deliverables, including a schedule of activities and milestones that describes when materials would be completed, including the drafts of relevant materials (max 2 pages).

5) Conclusion (max 2 pages).

319. Bidders on Core C are required to submit a total of no more than 30 pages (excluding CVs, minimum font size: 11) following the below outline for their technical proposal:

1) Introduction (max 3 pages)

2) Project approach and processes (max 20 pages)
   a) Task C1: Recruitment and management of an expert in early teaching career
   b) Task C2: Input to the conceptual framework for content related to early teaching career
   c) Task C3: Development of new questionnaire content for novice teachers
a. Cross-sectional scenario
b. Longitudinal scenario
d) Analysis of the project design, architecture and expertise with content
   a. Analysis of TALIS 2024 governance and priorities
   b. Analysis the complexity of TALIS (methodological and technical complexities, timeline constraints, working with many and diverse countries, working with many experts, working with several contractors)
   c. Expertise with issues related to teachers' early career
d. Analysis of the technical specificities of the novice teacher module and of its two scenarios

3) Description of bidding organisation (max 5 pages)
   a) Organisational structures and capacities
   b) Overview of key staff
   c) Short outline of past projects of a similar nature

4) A detailed schedule of deliverables, including a schedule of activities and milestones that describes when materials would be completed, including the drafts of relevant materials (max 2 pages).

5) Conclusion (max 2 pages).

320. Bidders on Core D are required to submit a total of no more than 30 pages (excluding CVs) following the below outline for their technical proposal:

1) Introduction (max 3 pages)
2) Project approach and processes (max 20 pages)
   a) Task D1: Establish and manage a Teacher Knowledge Expert Group (TKEG)
   b) Task: D2: Development of the TKS conceptual framework
   c) Task D3: Development of the TKS instruments
   d) Analysis of TALIS 2024 project design and architecture and expertise on content
      a. Analysis of TALIS 2024 governance and priorities
      b. Analysis of the complexity of TALIS (methodological and technical complexities, timeline constraints, working with many and diverse countries, working with many experts, working with several contractors)
      c. Expertise with teachers’ pedagogical knowledge and professional competence more broadly
      d. Analysis of the technical specificities of the TKS assessment module

3) Description of bidding organisation (max 5 pages)
   a) Organisational structures and capacities
   b) Overview of key staff
   c) Short outline of past projects of a similar nature

4) A detailed schedule of deliverables, including a schedule of activities and milestones that describes when materials would be completed, including the drafts of relevant materials (max 2 pages).
5) Conclusion (max 2 pages).

321. All bidders should highlight concrete proposals for innovation on approaches, processes, structures or elsewhere in their bids and critically reflect on ways to increase efficiencies across the board.

322. All CVs of key staff, such as heads of teams or critical roles, and staffing information (number of staff on task, seniority and expertise of staff, percentage on project over duration of project) shall be provided.

1.10.2. Budget guidelines and assumptions

323. Bidders are required to include a detailed budget breakdown per task and per year, using the financial template provided. The Organisation will not accept financial offers that are not filled in with all the information requested or that are submitted in a different format from that of the price grids provided.

324. Bidders for Core A must work under the assumption that 40 countries will participate in the ISCED 2 main survey. Bidders should be aware that the Secretariat expects that a total of 55-60 countries and economies are likely to take part in the ISCED 2 main survey for TALIS 2024. Bidders for Core A must also work under the assumption that 10 countries will participate in the usual international modules (ISCED 1, ISCED 3 and TALIS-PISA link). Bidders must work under the assumption that 8 countries will participate in the ISCED 0 module (TALIS Starting Strong), 8 in the novice-teachers module and 8 in the TKS assessment module. All bidders are required to indicate marginal cost per additional country, beyond these thresholds in the summary sheets of the financial template provided.

325. Budgets should be presented in EUR and detailed according to the price grids attached separately. For each Core, budget should be provided for each task and total. Bidders should evaluate the costs of the relevant components of their proposal separately.

326. Bidders should take account of the fact that the TALIS 2024 cycle will build on the work done in the previous cycles. It is important that bids demonstrate good value for money, and that bidders clearly show how they will be able to build on and add value to the work done in the past.

327. Bidders applying for more than one Core shall indicate on a separate document, joint to the price grids, what are the economies of scale, savings and benefits in the case that they are assigned more than one Core.

1.10.3. Background documents

328. Relevant documentation will be available on the OECD’s eSourcing platform. Some of the document are classified; candidates need to sign a declaration of confidentiality and send a copy back to the OECD before we can share these documents with them.

Publicly available documents:

- TALIS 2018 Conceptual Framework
- TALIS 2018 Technical Standards
- TALIS 2018 NPM Manual
- TALIS 2018 Pilot Guidelines
- TALIS 2018 Field Trial - Survey Operations manuals (5 units)
- TALIS 2018 Main Survey - Survey Operations manuals (5 units)
• TALIS 2018 Main Survey School Coordinator Manual (online and paper administration)
• TALIS 2018 Results - Volume I
• TALIS Starting Strong 2018 Conceptual Framework
• TALIS Starting Strong 2018 Technical Report
• TALIS 2018 & TALIS Starting Strong 2018 User Guide
• TALIS Starting Strong 2018 Results - Volume I
• Overview of Teacher Knowledge Survey Assessment Module
• Teacher Knowledge Survey – Report on the pilot study

Classified documents:
• Summary record of the 3rd TALIS TAG meeting
• Looking back - Lessons learnt from TALIS 2018 cycle
• Looking to the future – TGB insights

1.10.4. Evaluation criteria

329. The following tables outline a breakdown of evaluation criteria applicable for this tendering procedure. Indicative weights of these criteria in the evaluation of bids as well as related submission requirements are listed for ease of reference.
### Table 3a: Evaluation Criteria for Core A

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weight</th>
<th>Related submission requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Overall approach: Clarity, feasibility and quality in the proposal for each of the main areas of work</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A1: Establish, manage and chair the Questionnaire Expert Group (QEG)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A2: Production of the TALIS 2024 concept paper and conceptual framework</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A3: Development of the main survey questionnaires</td>
<td>35%</td>
<td>Sections 1, 2, 4, 5 of Core A bid</td>
</tr>
<tr>
<td>Task A4: Translation, translation plans and verification</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A5: Development and maintenance of computer platform</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A6: Sampling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A7: Survey operations and quality control</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A8: Data processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A9: Data scaling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A10: Production of the technical report and user guide</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A11: Support for the preparation of international reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task A12: Project management</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2. Understanding of the project design, architecture and expertise on content</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of the technical design of TALIS 2024</td>
<td>15%</td>
<td>Section 2 and, in particular, Section 2.m. of Core A bid</td>
</tr>
<tr>
<td>Demonstrated understanding of the tasks and the issues to be taken into account for each task</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of the survey themes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of the complexity of TALIS (methodological and technical complexities, timeline constraints, working with many and diverse countries, working with many experts, working with several contractors)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Analysis of risks to the project implementation and proposals for risk mitigation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>Proposed innovation and efficiency gains</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>3. Organisation and staff</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proven capacity to develop a collaborative working relationship with project stakeholders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experience with TALIS or similar international large scale assessment projects</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capacity to enlist the best international expertise in the areas of work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear and convincing proposals for how the Contractor will work with the National Project Managers, the Expert Groups and the sampling and translation referees, including how they will ensure a balanced coverage of expertise areas and geographic regions in the core or extended QEG, how they will manage the QEG and the work to develop the framework and questionnaires</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear indications of how the Contractor will efficiently implement and co-ordinate the development and administration of the main survey and the modules (as applicable) and manage critical issues during the implementation phase</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Detailed schedule of deliverables which includes a schedule of activities and milestones that describe when materials would be completed, including the drafts of relevant materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A commitment to work within a fixed price envelope and to work flexibly and in partnership with the OECD Secretariat and the TGB.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Qualifications and experience of the proposed staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>4. Financial evaluation of the overall cost of the proposal</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25% Financial proposal</td>
<td>Section 3 of Core A bid, CVs of staff, Section 4</td>
<td></td>
</tr>
<tr>
<td>Criteria</td>
<td>Weight</td>
<td>Related submission requirements</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>--------</td>
<td>---------------------------------------------------------------------</td>
</tr>
<tr>
<td>1. Overall approach: Clarity, feasibility and quality in the proposal for each of the main areas of work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task B1: Recruit experts on ECEC for the Questionnaire Expert Group (QEG) and manage related meetings.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task B2: Production of the TALIS Starting Strong 2024 conceptual framework</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task: B3: Development of the TALIS Starting Strong 2024 questionnaires</td>
<td>35%</td>
<td>Sections 1, 2, 4, 5 of Core B bid</td>
</tr>
<tr>
<td>2. Understanding of the project design, architecture and expertise with content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of overall TALIS 2024 governance and priorities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of the complexity of TALIS (methodological and technical complexities, timeline constraints, working with many and diverse countries, working with many experts, working with several contractors)</td>
<td>15%</td>
<td>Section 2 including, in particular, Section 2.d. of Core B bid</td>
</tr>
<tr>
<td>Demonstrated understanding of the technical specificities of the ISCED 0 module</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of the themes of the ISCED 0 module</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Organisation and staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proven capacity to develop a collaborative working relationship with project stakeholders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experience with TALIS Starting Strong or similar international survey projects</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capacity to enlist the best international expertise in the areas of work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear and convincing proposals for how the Contractor will manage the experts and the work to develop the framework and questionnaires</td>
<td>25%</td>
<td>Section 3 of Core B bid, CVs of staff, Section 4</td>
</tr>
<tr>
<td>Clear indications of how the Contractor will efficiently work to ensure co-ordination with the work completed under Core A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Detailed schedule of deliverables which includes a schedule of activities and milestones that describe when materials would be completed, including the drafts of relevant materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>A commitment to work within a fixed price envelope and to work flexibly and in partnership with the OECD Secretariat and the TGB and the OECD ECEC network</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Qualifications and experience of the proposed staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Financial evaluation of the overall cost of the proposal</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Financial proposal</td>
<td></td>
</tr>
<tr>
<td>Criteria</td>
<td>Weight</td>
<td>Related submission requirements</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>--------</td>
<td>-------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>1. Overall approach: Clarity, feasibility and quality in the proposal for each of the main areas of work</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task C1: Recruitment and management of an expert in early teaching career</td>
<td>35%</td>
<td>Sections 1, 2, 4, 5 of Core C bid</td>
</tr>
<tr>
<td>Task C2: Input to the conceptual framework for the content related to early teaching career</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task: C3: Development of new questionnaire content for novice teachers</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2. Understanding of the project design and architecture and expertise on content</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of overall TALIS 2024 governance and priorities</td>
<td>15%</td>
<td>Section 2 including, in particular, Section 2.d of Core C bid</td>
</tr>
<tr>
<td>Demonstrated understanding of the complexity of TALIS (methodological and technical complexities, timeline constraints, working with many and diverse countries, working with many experts, working with several contractors)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of issues related to teachers’ early career</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of the technical specificities of the novice teacher module and of its two scenarios</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>3. Organisation and staff</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proven capacity to develop a collaborative working relationship with project stakeholders</td>
<td>25%</td>
<td>Section 3 of Core C bid, CVs of staff, timeline</td>
</tr>
<tr>
<td>Experience with TALIS or with longitudinal surveys</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capacity to enlist the best international expertise in the areas of work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear and convincing proposals for how the Contractor will manage the experts and the work to develop new questionnaire content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear indications of how the Contractor will efficiently work to ensure co-ordination with the work completed under Core A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Detailed schedule of deliverables which includes a schedule of activities and milestones that describe when materials would be completed, including the drafts of relevant materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>A commitment to work within a fixed price envelope and to work flexibly and in partnership with the OECD Secretariat and the TGB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Qualifications and experience of the proposed staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>4. Financial evaluation of the overall cost of the proposal</strong></td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Financial proposal</td>
<td></td>
</tr>
</tbody>
</table>

Table 3d: Evaluation Criteria for Core D
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weight</th>
<th>Related submission requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Overall approach: Clarity, feasibility and quality in the proposal for each of the main areas of work</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task D1: Establish and manage a Teacher Knowledge Expert Group (TKEG)</td>
<td>35%</td>
<td>Sections 1, 2, 4, 5 of Core D bid</td>
</tr>
<tr>
<td>Task D2: Development of the TKS conceptual framework</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task: D3: Development of the TKS instruments</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2. Understanding of the project design and architecture and expertise with content</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of overall TALIS 2024 governance and priorities</td>
<td>15%</td>
<td>Section 2 including, in particular, Section 2.d Core D bid</td>
</tr>
<tr>
<td>Demonstrated understanding of the complexity of TALIS (methodological and technical complexities, timeline constraints, working with many and diverse countries, working with many experts, working with several contractors)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of teachers’ pedagogical knowledge and professional competence more broadly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrated understanding of the technical specificities of the TKS assessment module</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>3. Organisation and staff</strong></td>
<td>25%</td>
<td>Section 3 of Core D bid, CVs of staff, timeline</td>
</tr>
<tr>
<td>Proven capacity to develop a collaborative working relationship with project stakeholders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experience with international assessments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capacity to enlist the best international expertise in the areas of work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear and convincing proposals for how the Contractor will manage the experts and the work to develop the conceptual framework, and the TKS instruments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear indications of how the Contractor will efficiently work to ensure co-ordination with the work completed under Core A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Detailed schedule of deliverables which includes a schedule of activities and milestones that describe when materials would be completed, including the drafts of relevant materials</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
A commitment to work within a fixed price envelope and to work flexibly and in partnership with the OECD Secretariat and the TGB

<table>
<thead>
<tr>
<th>Qualifications and experience of the proposed staff</th>
<th></th>
</tr>
</thead>
</table>

| 4. Financial evaluation of the overall cost of the proposal | 25% | Financial proposal |
References


Minimum general conditions for OECD contracts

The following articles constitute the minimum general conditions of the contract to be signed between the OECD and the Contractor to whom the Competitive process would have been awarded (the “Contract”). These minimum general conditions are not exclusive and could, as the case may be, be modified and/or complemented with additional conditions in the Contract.

**ARTICLE 1 – GOODS OR SERVICES**

The goods and/or services provided under the Contract (hereinafter “The Work”) shall strictly comply with the standards mentioned in the Terms of Reference. It is expressly agreed that the Contractor shall perform the Work in strict accordance with all standards or, where no such standards have yet been formulated, the authoritative standards of the profession will be the applicable norms.

**ARTICLE 2 – PRICES**

Prices charged by the Contractor for the Work shall not vary from the prices quoted by the Contractor in its Tender, with the exception of any price adjustment authorised in the Contract.

**ARTICLE 3 – PAYMENTS AND TAXES**

Payment will be made in Euros.

In case the Contractor is located outside of France, the Organisation may be exempted from taxation, including from sales tax and value added tax (V.A.T.). Therefore, the Contractor shall not charge any such tax to the Organisation. All other taxes of any nature whatsoever are the responsibility of the Contractor.

In other cases, the prices shall be indicated exclusive of tax. If the amounts payable to the Contractor for the Work are subject to value added tax (V.A.T.), the Contractor's invoice will show the applicable V.A.T. rate and corresponding amount on the invoices, as well as the total amount before and after such tax.

**ARTICLE 4 – DELAY IN EXECUTION**

The Contractor shall perform the Work in accordance with the time schedule and the terms specified in the Contract, this being an essential element of the Contract. Any delay will entitle the Organisation to claim the payment of penalties as negotiated between the Contractor and the Organisation.

**ARTICLE 5 – ACCESS TO THE PREMISES AND SYSTEMS**

If the Work requires at any time the presence of the Contractor and/or of the Contractor’s employees, agents or representatives (“Personnel”) on the premises of the Organisation and/or access to the OECD’s systems, they shall observe all applicable rules of the Organisation, in particular security rules, which the Organisation may enforce by taking any measures that it considers necessary.

**ARTICLE 6 – IMPLEMENTATION OF THE WORK**

The Contractor undertakes that the Work shall be performed by the individual(s) named in the Contract or otherwise agreed in writing by the Organisation. The Contractor may not replace said individual(s) by others, without the prior written consent of the Organisation.

**ARTICLE 7 – AUTHORITY**

The Contractor hereby declares having all rights and full authority to enter into the Contract and to be in possession of all licences, permits (including work permits for Contractor’s Personnel) and property rights, in particular intellectual property rights, necessary for the performance of the Contract.

**ARTICLE 8 – LIABILITY**
The Contractor shall indemnify the Organisation and its personnel against any and all claims, losses, damages, costs or liabilities of any nature whatsoever, including those of third parties, arising directly or indirectly out of or in connection with Contractor’s performance or breach of the Contract.

The Contractor shall, at its own cost, maintain throughout the duration of the Contract and as necessary thereafter adequate insurances to cover such risks, including any risks related to the execution of the Contract.

**ARTICLE 9 – REPRESENTATIVES**

Neither the Contractor nor any of its Personnel (including but not limited to its experts, employees, agents or representatives):

- shall in any capacity be considered as members of the staff, employees or representatives of the Organisation;
- shall have any power to commit the Organisation in respect of any obligation or expenditure whatsoever;
- shall have any claim to any advantage, payment, reimbursement, exemption or service not stipulated in the Contract. In particular and without limitation, it is understood that neither the Contractor, nor any of the Contractor’s Personnel may in any manner claim the benefit of the privileges and immunities enjoyed by the Organisation or by its personnel.

**ARTICLE 10 – INTELLECTUAL PROPERTY**

The results and products, both intermediate and final, of the Work carried out in performance of the Contract, including all intellectual property rights arising therefrom, shall belong exclusively to the Organisation. These rights shall vest in the Organisation as and when the Work is created, or if this is not legally possible, be assigned to the Organisation by the Contractor throughout the world, on a perpetual basis.

As exclusive owner of the Work, the OECD enjoys full rights over it, including (but not limited to) the right to license, publish, display, represent, reproduce, adapt, translate, modify, create derivative work, sell, exploit, administer, use and dispose of the Work and to retain any and all benefit, revenue and income accruing therefrom, without the prior written consent of the Contractor being required. In particular, the OECD may freely decide to publish or not the Work (and/or any adaptation thereof).

All right in the Contractor’s pre-existing proprietary intellectual property included in the results and products of the Work shall remain with the Contractor. If the Work includes any pre-existing materials owned by the Contractor, the Contractor grants to the OECD a perpetual, irrevocable, non-exclusive, sublicensable, worldwide and royalty-free licence to use such materials as part of the Work.

The Contractor warrants that the results and products of the Work do not infringe the intellectual property or other rights of any third parties.

The Contractor shall not use the OECD name and/or logo without the prior written consent of the OECD.

**ARTICLE 11 – TRANSFER OF RIGHTS OR OBLIGATIONS**

The Contractor shall not transfer to any third party any rights or obligations under this Contract, in whole or in part, or sub-contract any part of the Work, except with the prior written consent of the Organisation.

**ARTICLE 12 – TERMINATION**

Without prejudice to any other remedy for breach of Contract the Organisation may claim, the Organisation reserves the right to terminate the Contract without any prior notice or indemnity:
i) in the event of failure by the Contractor to comply with any of its obligations under the Contract; and/or

ii) if the Contractor, in the judgment of the Organisation, has engaged in corrupt or fraudulent practices in competing for or in executing the Contract.

The Organisation may also, by written notice sent through registered mail with recorded delivery to the Contractor, terminate the Contract, in whole or in part, at any time for its convenience. The notice shall specify that termination is for the Organisation's convenience, the extent to which Work of the Contractor under the Contract has been completed, and the date upon which such termination becomes effective. The Work that is complete on receipt of notice by the Contractor shall be accepted by the Organisation, at the Contract terms and prices. For the remaining, the Organisation may elect:

i) To have any portion completed at the Contract terms and prices; and/or;

ii) To cancel the remainder and pay to the Contractor the amount corresponding to the completed work.

**ARTICLE 13 – FINANCIAL INFORMATION**

During the Contract and at least seven years after its termination, the Contractor shall:

i) keep financial accounting documents concerning the Contract and the Work;

ii) make available to the Organisation or any other entity designated by the Organisation, upon request, all relevant financial information, including statements of accounts concerning the Contract and the Work, whether they are executed by the Contractor or by its any of its subcontractors.

The Organisation or any other entity designated by the Organisation may undertake, including on the spot, checks related to the Contract and/or the Work.

**ARTICLE 14 – ETHICAL PRACTICES**

Having due regard to the nature and purposes of the OECD as an international organisation, the Contractor shall adhere to the highest ethical and business responsibility standards. In particular, the Contractor shall comply with (and shall ensure that its Personnel complies with) all applicable national and international rules relating to ethical and responsible standards of behaviour, including, without limitation, those dealing with human rights, environmental protection, sustainable development, anti-bribery and anti-corruption.

OECD staff may not accept, directly or indirectly, any gratuity, gift, favour, loan or anything of monetary value. In addition, we request our suppliers/providers to never put the Organisation or one of its staff members in an ethically unacceptable situation by offering gifts or hospitality of any kind.

**ARTICLE 15 – ARBITRATION CLAUSE**

Given the status of the Organisation as an international organisation, the Parties specifically agree that their rights and obligations shall be governed exclusively by the terms and conditions of the Contract.

Any dispute, controversy or claim arising out of or relating to the Contract, or the breach, termination or invalidity thereof, shall be settled by arbitration in accordance with the PCA Arbitration Rules 2012. The number of arbitrators shall be one. The language to be used in the arbitral proceedings shall be English. The place of arbitration shall be Paris (France). The Parties expressly renounce their right to seek the annulment or setting-aside of any award rendered by the arbitral tribunal, or if this renunciation is not legally possible, the Parties expressly agree that if an award rendered by the arbitral tribunal is annulled, the jurisdiction ruling on the annulment proceedings cannot rule on the merits of the case. The dispute will therefore be settled by new arbitral proceedings in accordance with this clause.
Nothing in the Contract shall be construed as a waiver of the privileges and immunities that the OECD enjoys as an international organisation.

**ARTICLE 16 – CONFIDENTIALITY**

Any information, on any medium whatsoever, sent to the Contractor to which the Contractor obtains access on account of the Contract, shall be held confidential. In consequence, the Contractor shall not disclose such information without the written prior consent of the Organisation. The Contractor shall ensure that the Contractor’s Personnel is expressly bound by and respect the provisions of the present clause.

**ARTICLE 17 – DATABASES**

The Contractor is informed that the OECD compiles an Organisation wide database of suppliers and that information relating to the Contractor will be included in this database. Subject to compliance with the OECD’s policies on protection of personal information, the database will contain any relevant information with respect to the Contractor and the Contractor’s contracts with the Organisation, including, without limitation, the financial terms, the contract deliverables and evaluations of the Contractor’s work. It is the Organisation’s policy to allow access to the database to certain management and administrative staff.

Notwithstanding anything expressed or implied by the present Contract or at law, and in particular any obligations of confidentiality undertaken by the Organisation, the Contractor understands and accepts that the OECD will collect, process and disclose the information related to the Contractor in the manner described above and hereby waives all claims against the Organisation and its personnel in this respect.