

TERMS OF REFERENCE (KAZAKHSTAN)

Project title: **Compiling of a country report “Open Educational Resources in Kazakhstan: State-of-the-Art, Challenges and Prospects for Development” (open for Kazakhstan nationals only).**

1. BACKGROUND AND JUSTIFICATION

Since 2002, UNESCO has been promoting the initiative for free educational resources on the Internet (Forum on Open Courseware for Developing Countries, UNESCO, Paris, July, 2002). During the last decade, a consensus within the educational community has been achieved on the approaches to be used in producing OER and virtual repositories of learning materials. Dozens of large-scale repositories have been compiled, updated and used.

The importance of Open Educational Resources (OER) for the world education community has been stressed in the Communique of the 2009 World Conference on Education: The New Dynamics of Higher Education and Research for Societal Change and Development: “ODL approaches and ICTs present opportunities to widen access to quality education, particularly when Open Educational Resources are readily shared by many countries and higher education institutions” (UNESCO, Paris, 5-8 July 2009). Since 2012, OER work has focused on implementing the 2012 OER Paris Declaration with a view to making OER more widely used by educational stakeholders worldwide.

UNESCO Institute for Information Technologies in Education has been implementing a project on Open Educational Resources in non-English-speaking countries since 2010. The project activities build on the results of examination of the needs, capacities, opportunities and challenges for the production and use of OER in the target countries. The emphasis is placed on the exploration and dissemination of best practices, raising awareness of open licenses and development of recommendations for a wider use of OER in teaching and learning. At its initial stage the project was focused on educational content in the Russian language and covered mostly CIS and Baltic States. The preliminary study of the state-of-the-art of OER was carried out in Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyz Republic, Moldova, Russia, Ukraine, Uzbekistan, as well as in Latvia and Lithuania. A synthesis report “CIS on the Way towards Open Educational Resources” was prepared and published by IITE. In 2011, the geographical scope of the IITE OER project expanded to include Japan, China, Brazil, Turkey and Vietnam. Later on, the advancement of OER in Germany, France, Kenya and Poland was investigated. In total, 21 non-English speaking countries have been surveyed. These surveys provided further insight into how OER-related patterns vary in non-English-speaking countries. IITE published the case studies on OER in Lithuania, Brazil, China, Poland, Russia, France and Kenya.

2. OBJECTIVES

In order to monitor the state-of-the-art of OER, challenges faced by producers and opportunities for expanding the use of OER in educational institutions of Kazakhstan, the Consultant shall compile a report providing information on the current stage of advancement of OER in Kazakhstan. The study should encompass legal, political, pedagogical, technological OER-related issues, as well as those related to intellectual property rights, OER in the country.

The report should refer to the definition of OER by Hewlett Foundation accepted by UNESCO: “OER are teaching, learning and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use or re-purposing by others. Open educational resources include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials or techniques used to support access to

knowledge”. However, whenever necessary a country-specific OER terminology can be used, with due clarification and definitions.

3. ACTIVITIES

Compiling of a desk study analytical report “Open Educational Resources in Kazakhstan: State-of-the-Art, Challenges and Prospects for Development”.

The Consultant will develop a report on the use of OER in Kazakhstan using the UNESCO IITE publication “CIS on the Way Towards OER” as a starting point. The reports shall include the following information:

- 1) monitoring the achievements in OER advancement since the 2010 surveys completed in Kazakhstan, Kyrgyz Republic and Uzbekistan;
- 2) overview of basic principles underlying the development of OER, including ICT-policy, pedagogical, technological and financial aspects;
- 3) description of main technologies and formats used to produce and share the resources and maintain OER repositories;
- 4) assessment of the distribution of OER and their impact on education;
- 5) analysis of IPR-related issues, including the legacy of open licenses;
- 6) description of 5 to 10 main OER initiatives/repositories;
- 7) description of the ways of OER quality assessment and opportunities for quality enhancement;
- 8) summary of lessons learned from the OER-related activities and policy development;
- 9) completed questionnaire on OER indicators (see Annex).

Structure of the report:

- 1) Executive Summary
- 2) Introduction
- 3) Description of the country OER status
- 4) Conclusion
- 5) Filled in questionnaire

Word limit: from 5000 to 10000 words.

4. TIMING

The Consultant shall compile the country report in Russian or English and submit its draft to UNESCO IITE for revision by November 9, 2017. The final version should be submitted to UNESCO IITE by November 30, 2017.

Instructions for Completing the Questionnaire

1. The survey is divided into three sections: A) Government Commitment, B) Institutional Adoption, and C) Teaching and Learning Impact. All three sections of the survey should be completed by a specialist in the Ministry of Education in your country, who is able to extract information on OER policies, strategies, and programmes, from national or provincial policy or strategy documents. If the information related to some of the questions is not centralized in your country, the questions may need to be sent to provinces, regions, states or institutions by the specialist, and then aggregated. External databases that map global OER initiatives may also be consulted. Examples of external databases to consult for information on OER initiatives in your country include:
 - a. [Creative Commons OER Policy Registry](#) (global)
 - b. [OER Knowledge Cloud](#) (global)
 - c. [OER World Map](#) (global)
 - d. [ROER4D Network Hub](#) (South America, Sub-Saharan Africa and South/South East Asia)
2. To aid in the completion of the questionnaire, a glossary and explanation of the survey items are included at the end of the survey. If you have any queries concerning the questionnaire, please contact [...]
3. Please return the completed questionnaire before [xx, Month, Year] to:
4. The survey can be completed online. The form is available at: [xx]

Please use the following symbols next to survey questions if you do not have the information requested:

na = item is not applicable

m = data missing (cannot locate data; data currently collected in my country)

SECTION A: Respondent Information

Please provide details below of the person responsible for completing this questionnaire.

Name:

Job title (or position):

Organization:

Department, division or sector (if any)

Country:

Telephone:

Email:

Institutional website:

If another individual also plays a major role in providing data on OER adoption and impact in your country, please provide the details below.

Name:

Job title (or position):

Organization:

Department, division or sector (if any)

Country:

Telephone:

Email:

Institutional website:

SECTION B: Government Commitment to OER

1. Does your country have *policies, strategies, or programmes* supporting OER or open licensing of educational materials? (Tick all that apply.)
 - Yes, OER or open licensing is referred to within existing educational strategy, planning or similar documents
 - Yes, we have formal, written policies supporting OER or open licensing
 - Yes, we have programmes in place in support of OER or open licensing
 - No, we do not have OER policies, strategies, or programmes in place for OER [skip to question 4]
 - Don't Know [skip to question 8]
2. Which types of policies, strategies, or programmes are in place? (Tick all that apply.)
 - National [skip to question 5]
 - Provincial/regional/state [go to question 3]
 - Other. Please specify:
3. What proportion of provinces/regions/states has policies, strategies or programmes in place in your country, addressing OER?
 - All, or about 100%
 - About 75%
 - About 50%
 - About 25%
 - Less than 10%
 - None
 - Don't know

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4. If your country does not currently have national or provincial OER policies, strategies, or programmes in place, are you considering policy development for OER in the future?

- Yes, at the national level. Please specify:
- Yes, at the provincial/regional/state level. Please specify:
- No
- Don't know

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[Skip to question 10]

5. Please indicate which of the following areas/activities are being addressed in your government's policies, strategies or programmes for OER. (Tick all that apply.)

- Open licensing provision or endorsement of open licensing
- Allocation of funding for OER
- Incentive mechanism to encourage OER use
- Quality assurance mechanism for evaluating OER
- OER technical infrastructure (e.g., OER repository)
- OER content development or creation
- Capacity building and training of educators on the use of OER
- Other. Please specify:

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6. Please indicate if any of your existing national, state or provincial policies, strategies or programmes on OER contain pro-equity provisions in favor of the following: (Tick all that apply.)

- Females
- Poor groups
- Rural areas
- Persons with disabilities
- HIV-affected target groups
- Others. Please specify:

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7. Please indicate which of the following education sectors/contexts your government's OER policies, strategies, or programmes cover. (Tick all that apply.)

- Primary education (ISCED 1)
- Secondary education (ISCED 2 and 3)
- Post-secondary/Not Tertiary (ISCED 4)
- Tertiary (ISCED 5-8)
- General education
- Technical Vocational Education and Training
- Informal learning
- Non-formal learning
- Other, please specify:
- Don't know

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8. In the past three years, please indicate whether your government has allocated funding to any of the following OER-related initiatives.

	Yes, at national level	Yes, at provincial /regional level	No	Don't Know
Funding to create awareness for OER	x	x	x	x
Funding for capacity building/training for educators on OER	x	x	x	x
Funding for an OER repository/technical infrastructure	x	x	x	x
Funding for the development of openly licensed educational materials	x	x	x	x
Funding for research on OER	x	x	x	x

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Other funding. Please specify: _____

9. If your country has provided funding for the development of educational resources with an open license, please specify how many resources.

- Yes, at the national level. Please specify how many:
- Yes, at the provincial/regional/state level. Please specify how many:
- No
- Don't know

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10. Does your country have an OER repository or platform for accessing and/or sharing OER? (Tick all that apply.)

- Yes, a national repository
- Yes, one or more provincial/regional/state repositories
- Yes, one or more institutional- or district-level repositories
- Yes, independent repository(ies), not affiliated with the government or an institution
- Yes, other. Please specify:
- No [skip to question 12]
- Don't know [skip to question 12]

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If yes, to the above, please provide links to your OER repository(ies):

11. Does your country offer a sufficient number of resources in the local language(s)? (Tick all that apply.)

- Yes, please specify:
- No, please explain:
- Don't know

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SECTION B. Institutional Adoption of OER

12. What proportion of school districts (ISCED 1-3) in your country have policies, strategies or programmes supporting OER or open licensing of educational materials?

- All or about 100%
- About 75%
- About 50%
- About 25%
- Less than 10%
- None
- Don't know

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13. What proportion of post-secondary and tertiary institutions (ISCED 4-8) in your country have policies, strategies or programmes supporting OER or open licensing of educational materials?

- All or about 100%
- About 75%
- About 50%
- About 25%,
- Less than 10%
- None
- Don't know

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14. What proportion of school districts (ISCED 1-3) in your country *offer or endorse* the use of openly licensed course content for their teachers and learners? (For example, open textbooks or digital course materials with open licenses.)

- All, or about 100%
- About 75%
- About 50%
- About 25%,
- Less than 10%
- None
- Don't know

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15. What proportion of school districts (ISCED 1-3) in your country has their own repositories or technologies for accessing and/or sharing OER?

- All, or about 100%
- About 75%
- About 50%
- About 25%,
- Less than 10%
- None
- Don't know

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16. What proportion of post-secondary and tertiary institutions (ISCED 4-8) in your country offer or endorse the use of openly licensed course content for their teachers and learners? (For example, open textbooks or digital course materials with open

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licenses.)

- All, or about 100%
- About 75%
- About 50%
- About 25%,
- Less than 10%
- None
- Don't know

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17. What proportion of post-secondary and tertiary institutions (ISCED 4-8) in your country has their own institutional repositories or technologies for accessing and/or sharing OER?

- All, or about 100%
- About 75%
- About 50%
- About 25%,
- Less than 10%
- None
- Don't know

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SECTION C: Perceived Teaching and Learning Impacts of OER

18. In your country, are research data being collected to determine whether OER has impacted teaching and learning?

- Yes, at the national level. Please specify:
- Yes, at the provincial/regional level/state level. Please specify:
- Yes, at the institutional level. Please specify:
- Yes, through independent researchers. Please specify:
- No [skip to question 20]
- Don't Know [skip to question 20]

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19. Where data is available, please rate whether OER has improved the following areas of teaching and learning at institutions in your country.

	Improved	Stayed the same	Worsened	Don't Know
Overall quality of teaching	x	x	x	x
Teacher collaboration on curriculum and instruction	x	x	x	x
Student academic performance (grades)	x	x	x	x
Student persistence in courses/programmes	x	x	x	x
Student engagement in courses/materials	x	x	x	x
Availability of high quality curriculum materials	x	x	x	x

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Please provide comments explaining your answer, including the unit of analysis and the rigor of the data that your answers are based on:

20. Approximately what proportion of educators (ISCED levels 1-8) in your country have been trained on OER through government-funded programmes (through national, or provincial/regional/state funding):

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- All, or almost 100%
- About 75%
- About 50%
- About 25%
- Less than 10%
- None
- Don't know

21. In your country, are user statistics/analytics being collected from OER repositories, or other sources? (For example, statistics on OER access, use, creation, or sharing by teachers and learners.)

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- Yes, through analytics data connected to our OER repository(ies); Please specify:
- Yes, through other data collection method(s); Please specify:
- No [skip to close of survey]
- Don't Know [skip to close of survey]

22. Based on these data, to what extent are educators in your country creating and posting materials with an open license, for others to use and reuse?

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- To a Great Extent
- Somewhat
- Very Little
- Not at All
- Don't know

Please provide comments explaining your answer, including the unit of analysis and the rigor of the data that your answer is based on:

Formal learning is typically provided by an education or training institution, is structured (in terms of learning objectives, learning time or learning support), and leads to certification. Formal learning is intentional from the learner's perspective.

General education refers to education programs that are designed to develop learners' general knowledge, skills and competencies, as well as literacy and numeracy skills, often to prepare students for more advanced education programs at the same or higher ISCED levels and to lay the foundation for lifelong learning. General education includes education programs that are designed to prepare students for entry into vocational education but do not prepare for employment in a particular occupation, trade, or class of occupations or trades, nor lead directly to a labour market-relevant qualification.

Informal learning refers to forms of learning that are intentional or deliberate but are not institutionalised. It is less organized and structured than either formal or non-formal education. Informal learning may include learning activities that occur in the family, workplace, local community and daily life, on a self-directed, family-directed or socially-directed basis.

ISCED 1 comprises primary education, which generally begins at ages 5-7 years and lasts about 5 years. These programmes are typically designed to provide students with fundamental skills in reading, writing and mathematics and to establish a solid foundation for learning.

ISCED 2 and 3 (or secondary education) comprises the first and second stages of secondary education. Lower secondary education (level 2) begins at the age of 11 or 12 and lasts about three years, while the upper secondary education (level 3) begins at the age of 14 or 15 and also lasts about three years. Lower secondary education builds on primary education, typically with a more subject-oriented curriculum. Upper secondary education (level 3) prepares students for tertiary education and/or provides skills relevant to employment usually through an increased range of subject options and streams.

ISCED 4 (or post-secondary non-tertiary education) provides learning experiences building on secondary education, preparing for labour market entry as well as tertiary education. It aims at the individual acquisition of knowledge, skills and competencies lower than the level of complexity characteristic of tertiary education. Programmes at ISCED level 4 are typically designed to provide individuals who completed ISCED level 3 with non-tertiary qualifications required for progression to tertiary education or for employment when their ISCED level 3 qualification does not grant such access. For example, graduates from general ISCED level 3 programmes may choose to complete a non-tertiary vocational qualification; or graduates from vocational ISCED level 3 programmes may choose to increase their level of qualifications or specialise further. The content of ISCED level 4 programmes is not sufficiently complex to be regarded as tertiary education, although it is clearly post-secondary.

ISCED 5-8 comprises the post-secondary tertiary education. Level 5 is typically practically-based, occupationally-specific and prepares students for labour market entry. Levels 6-8 are programmes designed to provide academic and/or professional knowledge, skills and competencies leading respectively to bachelors, masters or doctoral degrees.

Non-formal learning refers to education that is institutionalised, intentional and planned by an education provider. The defining characteristic of non-formal education is that it is an addition, alternative and/or complement to formal education within the process of the lifelong learning of individuals. It is often provided to guarantee the right of access to education for all. It caters to people of all ages but does not necessarily apply a continuous pathway-structure; it may be short in duration and/or low-intensity, and it is typically provided in the form of short courses, workshops or seminars. Non-formal education mostly

leads to qualifications that are not recognised as formal or equivalent to formal qualifications by the relevant national or sub-national education authorities or to no qualifications at all. Non-formal education can cover programs contributing to adult and youth literacy and education for out-of-school children, as well as programs on life skills, work skills, and social or cultural development.

Open Educational Resources (OER) are defined as teaching and learning materials that may be used and reused at no cost, and without needing to ask permission; they are usually released under an open license that states specifically how the material may be used, reused, adapted, and shared.

OER repository or platform is a digital library or online space that hosts or aggregates OER and that attempts to make this content accessible and easy to find through search tools, categorization, and the use of metadata. OER repositories may be password protected and “closed” for a specific group of users, or they may be openly accessible for anyone to use.

Open license is a license that allows copyrighted materials to be used, adapted and redistributed without permission from the copyright holder. The best-known open licenses are the Creative Commons Licenses, which provide legal mechanisms to ensure that people retain copyright over and acknowledgement for their work while allowing it to be shared under the terms and conditions of their choice.

Quality assurance mechanisms for OER are mechanisms used to evaluate and assess the quality of OER, and include the use of peer review, feedback from users, and rubrics that assess the degree of alignment to learning standards, accessibility standards, and other quality criteria.

Student engagement refers to the degree of attention, curiosity, interest, and passion that students show when they are learning or being taught, which extends to the level of motivation they have to learn and progress in their education.

Student persistence refers to the act of continuing towards an educational goal (e.g., earning a bachelor’s degree).