Horizontal comparisons of qualifications levelled in NQFs

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- and experts from the following countries:
  - Hungary
  - Italy
  - Latvia
  - Norway
  - Poland (coordinator)
  - Sweden
  - Scotland (to be included into the final report)
The horizontal comparison working team:

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  - Baiba Ramina
  - Indra Gara
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- Cedefop/AG
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Horizontal comparison (HC) objectives (AG32-3 note)

- The general aim of the pilot is to further improve the way EQF levelling takes place, building on national experiences;
- The specific aim of the pilot is to fine-tune and test a methodology for the comparison of levelling decisions and sharing experiences on existing strengths and weaknesses;
- The results will inform and support future levelling decisions at national level, and remain the property of these countries.
- The experiences from the pilot will inform and orient future ‘horizontal comparisons’;
- ‘Horizontal comparisons’ will address the consistency of the referencing of national qualifications, seeking (for example) to clarify:
  - whether seemingly comparable qualifications assigned to the same level are indeed comparable, and;
  - why seemingly similar qualifications have been assigned to different levels in different countries;
- HC also provides information on detail and way of describing learning outcomes across different countries.
The EQF Recommendation of 23 April 2008

The EQF is a common European reference framework which links countries’ qualifications systems together, acting as a translation device to make qualifications more readable and understandable across different countries and systems in Europe. It has two principal aims: to promote citizens’ mobility between countries and to facilitate their lifelong learning.

The Recommendation will establish a common European reference which will link the various national qualifications systems together and so facilitate greater communication between them.

The objective of this Recommendation is to create a common reference framework which should serve as a translation device between different qualifications systems and their levels, whether for general and higher education or for vocational education and training. This will improve the transparency, comparability and portability of citizens’ qualifications issued in accordance with the practice in the different Member States. Each level of qualification should, in principle, be attainable by way of a variety of educational and career paths.
Horizontal comparison exercise as an example of the soft coordination approach

The open method of coordination (OMC)
• form of intergovernmental policy-making that does not result in binding EU legislative measures.
• takes place in the areas of education, youth and vocational training, employment and social protection.

The OMC is principally based on:
• jointly identifying and defining objectives to be achieved (adopted by the Council),
• jointly established measuring instruments (statistics, indicators, guidelines),
• benchmarking, i.e. comparison of EU countries' performance and the exchange of best practices (monitored by the Commission).

The work on HC is in line with the open method of coordination. It leads to:
• joint identification of the principles and approach for the comparability of qualifications in countries
• developing the guidelines of such comparisons in the future.
• helps to develop an approach for benchmarking national qualifications.
The HC working team main goals:

- to develop a common methodology – the horizontal comparison tool for levelled qualifications across countries,
- to address the consistency of the linking of national qualifications, seeking how to:
  - improve the way NQF levelling takes place,
  - understand and explain if seemingly comparable qualifications assigned to the same level are indeed comparable,
  - understand and explain why seemingly similar qualifications have been assigned to different levels in different countries,
  - deliver a methodology for horizontal comparisons, including a “technical comparison fiche”.
- In general:
  - to ensure/improve the way national qualifications are linked to the NQF for achieving and supporting better transparency, understanding and trust within and between countries.
  - and/but to protect of the variety and diversity of education and qualifications systems against any form of unifying and standardisation
The participation in the exercise was voluntary. The comparison of levelled qualifications was not treated as a tool for controlling submitted reports but to prepare effective tools for the comparison of the data provided by common work, the sharing of experiences, and a better understanding of the national approaches to methods of qualifications levelling.
Main project results (1)

• The technical fiche is an effective tool for the horizontal comparison of levelled qualifications.

• The comparability of levelled qualifications cannot be understood as a simple match of sets of qualifications’ learning outcomes – other elements of national qualifications systems and methods of levelling should be considered. They are represented in the proposed fiche as “context information”.

• The comparability does not demand the strict standardisation of qualifications descriptions across countries. Nevertheless, for mutual understanding and trust, some core information should be provided. This is represented by the fiche sections and by additional questions developed in the project.

• The language for the description of qualifications developed by countries on the basis of the EQF Recommendation of 2008 and the referencing processes is sufficient to present and compare qualifications.
Main project results (2)

- **Comparability does not require identical national methods** of levelling. Nevertheless, to safeguard the “best fit” method, **two core elements** should be present in any national method of levelling:
  - the **learning outcomes** of a qualification **should be referred** to the level descriptors,
  - **their mutual reference** is evaluated / **confirmed by the quality assurance systems**.

- The criteria of referencing adopted by the Advisory Group are a **sufficient** tool for referencing and comparing levelled qualifications.

- **The outcomes of the pilot** exercise indicate that **the assumption** of the EQF 2008 Recommendation on the comparability of qualifications using the EQF and NQFs’ level descriptors to set the levels of qualifications is **met** and that national practices in levelling can be trusted.
The HC team working agenda:

- February – preliminary discussion on method and agenda of work
- March - April – qualifications chosen and methodology / fiche accepted
- April - May – delivery of LO descriptions etc. by countries, first part of comparative analysis; need for additional questions
- June – presentation of the HC first results at the AG36
- July – answers for additional questions – additional analysis done
- September 9 – working meeting in Warsaw
- October 3 – working meeting in Brussels
- October 4 – presentation of the HC results at the 37 AG
- November 14 – working meeting in Warsaw on the deliverables/ draft of the final report
- December 1st - draft of final report sent to the AG for discussion
- December 8/9 - presentation of the draft final report at the 38 AG meeting
- Next steps
Choice of qualifications:

The two qualifications were chosen for analysis:
* CNC operator
* Mechanical engineer
### Fiche for horizontal comparisons (p.14)

<table>
<thead>
<tr>
<th>Country:</th>
<th>Country A</th>
<th>Country B</th>
<th>Country ...</th>
<th>Results of the horizontal comparison of qualifications and their levelling – similarities and differences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group members:</td>
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<tr>
<td>Title of qualification (bililingual)¹:</td>
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<tr>
<td>Scope of qualification²:</td>
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<tr>
<td>Context information³:</td>
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<tr>
<td>• Access rights;</td>
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<tr>
<td>• Purpose of the qualification in education;</td>
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<tr>
<td>• Purpose of the qualification at the labour market;</td>
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<tr>
<td>• Reference to occupational context;</td>
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<tr>
<td>• International standards;</td>
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<tr>
<td>• Recognition practice;</td>
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<tr>
<td>• Validation practices;</td>
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<tr>
<td>• Validation of informal and non-formal learning;</td>
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<tr>
<td>• Quality assurance;</td>
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<tr>
<td>• Other relevant.</td>
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<tr>
<td>Organization of learning outcomes⁴:</td>
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<tr>
<td>Learning outcomes⁵:</td>
<td></td>
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<tr>
<td>Analysis of learning outcomes⁶:</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Basis of levelling⁷:</td>
<td></td>
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<td></td>
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<tr>
<td>Level of NQF/EQF⁸:</td>
<td></td>
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</tr>
<tr>
<td>Conclusions of the qualification horizontal comparison between countries</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Recommendations (overall, per country, to EQF AG)</td>
<td></td>
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</tr>
</tbody>
</table>
General methodology:
What does it mean to compare qualifications?
(after the first wave of data submission)

• “Comparable qualifications” does not mean „identical qualifications”. The comparison is needed when the qualifications are not identical.

• The set of information provided by the fiche adopted in the project is sufficient for comparing qualifications.

• To compare LOs means:
  • Looking for identical LOs – selection of the same or almost the same LOs
  • Looking for substantial similarities – selection of similar LOs
  • Looking for substantial differences – selection of different LOs
  • Evaluating the scope and character of similar and different LOs, the importance of information included in the data for the essential (“hard core”) characteristics of qualifications
  • Comparing the language used to describe the LOs.
Comparing qualifications also means considering:

- Comparison (if relevant) of the **volume of qualifications/period of learning**
- Comparison of **levelling methods** used
- **Indicating the acceptable limits** of differences between the LOs
- **Explanation of the differences**, considering the **levelling method** and **context information**
- Explanation of the differences, considering **the description of the “actual qualification”**
- Analysis of quality assurance evidence relevant to the compared qualifications
- Whether or not we can confirm that the qualifications are / are not comparable
- Submission of evidence providing the rationale for this conclusion.

The comparison cannot be done “mechanically” it demands the careful evaluation.
Operational methodology

3 stages of context information analysis

1. Indicating „core elements” of context information + submission and analysis of data

2. Submission and analysis of other context information data

3. Additional questions as guidance for data collection recommended
   - Submission and analysis of additional data

It was „learning by doing” method.
Questions / answers of context analysis

• Regarding the methodology of the comparison of national levelling decisions do we need a context information? - YES

• Why is the context information essential (or at least important) for horizontal comparison? – VARIETY of of national approaches protected

• Which categories of the context information are relevant for the HC? Are these categories „core elements”? – Basis for selection?
  • Experts evaluation needed

• Need for „additional questions”
## Additional questions (p.18 and Appendix)

<table>
<thead>
<tr>
<th>Sample questions included in the Box</th>
<th>Additional comments and questions</th>
<th>Access rights</th>
<th>Purpose of the qualification on the labour market</th>
<th>Recognition practices (qualifications)</th>
<th>Validation practices</th>
<th>Quality assurance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is eligible to apply for the qualification? What are the prerequisites? What are other requirements for applicants (formal, financial, etc.)?</td>
<td>What are the entry requirements to apply for this qualification? Conditions regarding e.g., health or citizenship, e.g.: required prior qualifications, e.g.: holders of certificate of general basic education/certificate of enrolment into basic education (vol) making the job title of worker [p.j.] Participants of the training shall have one of the following qualifications/professional qualification as an entry requirement to be allowed to participate in the training; the following list relating to Operator (p.18)</td>
<td>Determine if the qualification is recognised by all the project partners and the idea and agreement by local partners of introducing this category, it should be considered to change the term “recognition” in the term “certification”. The term “recognition” in many countries (including Poland) means a formal recognition by a competent body of the quality of a qualification obtained abroad in order to continue education or for labour market purposes in one’s home country. However, the main purpose of this category, was to present a process resulting in the issuance by a competent body of a document certifying that a learner has achieved a defined set of learning outcomes.</td>
<td>Who is responsible for a recognition? What are the recognition practices/procedures?</td>
<td>Who is responsible for a validation of the qualification? What are the validation practices/procedures?</td>
<td>What are the requirements for quality assurance?</td>
<td>What is responsible for quality assurance?</td>
</tr>
<tr>
<td>What is the qualification worth? How does it differ from the one on the market?</td>
<td>What are the most important job prospects and further learning prospects?</td>
<td>Taking into account the information submitted by the project partners and the idea and agreement by local partners of introducing this category, it should be considered to change the term “recognition” in the term “certification”. The term “recognition” in many countries (including Poland) means a formal recognition by a competent body of the quality of a qualification obtained abroad in order to continue education or for labour market purposes in one’s home country. However, the main purpose of this category, was to present a process resulting in the issuance by a competent body of a document certifying that a learner has achieved a defined set of learning outcomes.</td>
<td></td>
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</tr>
</tbody>
</table>

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**European Funds**

Knowledge Education Development

**kwalifikacje dla każdego**

**European Union**

European Social Fund
## Purpose of the qualification at the labour market

Determines if the qualification is required/one of requirements/recommended to practice a certain profession

<table>
<thead>
<tr>
<th>Purpose of the qualification at the labour market</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the most important job prospects and further learning prospects?</td>
</tr>
<tr>
<td>What are the opportunities in the labour market (national, European, global) that this qualification gives to those who confirm its required learning outcomes?</td>
</tr>
<tr>
<td>What are the prospects for further learning after the obtaining of this qualification?</td>
</tr>
<tr>
<td>About what further qualifications will the holder of this qualification be able to apply?</td>
</tr>
<tr>
<td>Example:</td>
</tr>
<tr>
<td>“A person with a qualification can be employed by clubs, associations and sports federations, e.g. to conduct national teams, provincial, players have a predisposition to achieving high performance sports teams in the highest class divisions. It can also work with regional sport associations in the field of education and training of staff training.”</td>
</tr>
<tr>
<td>“The qualification may be used in the situation:</td>
</tr>
<tr>
<td>- Employment in the service and repair workshops, points service and sales of motorcycles services for users of motorcycles,</td>
</tr>
<tr>
<td>- Doing business in the provision of services related to the diagnosis, repair and maintenance of motorcycles,</td>
</tr>
<tr>
<td>- Hobby dealing with servicing and repair their own Motorcycle”</td>
</tr>
</tbody>
</table>
Conclusions from the analysis of context information

- **the fiche is an efficient tool for gathering** and ordering data and making comparison of context information
  - „additional questions” - provided significantly valuable information in some categories – introduction to the guideline (?)
  - **Volume of the description should be determined in order to make comparisons easier**
  - Recommendation for illustrating and supplementing the analyzed qualification by description of an actual qualification provided by an actual institution
  - In general – for future research: need for the guidelines for data collection and analysis and need for experienced evaluators
Learning outcomes descriptions: data gathered, way of comparison, results

1. The analysis of LO’s information consisted also of two stages:
   * the LO’s were grouped thematically, in order to make them comparable
   * the coherence of descriptions was evaluated

2. Analysis of the learning outcomes in order to determine the level of qualification.
   - Each learning outcome was compared with a level descriptors in a given NQF.
   - The adequate (“best fit”) descriptor has to be unequivocally indicated
<table>
<thead>
<tr>
<th>Category</th>
<th>HU</th>
<th>NO</th>
<th>LV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparation to work - selection of equipment</td>
<td>select, prepare and use CNC machines and equipment suited to the production assignment</td>
<td>5. Choose appropriate technological equipment.</td>
<td>1) Recognizes the need for appropriate tooling to perform technological operations (machining process)</td>
</tr>
<tr>
<td></td>
<td>select and use the correct protective equipment for the job at hand</td>
<td>6. Choose the necessary tools for installing the machine.</td>
<td>5) Selects tools and fastening tools used in the machining process</td>
</tr>
<tr>
<td></td>
<td>select and use materials based on the task and explain characteristics of material involved</td>
<td>7. Choose and use auxiliary materials according to technological process.</td>
<td>7) Downloads the machining software, tools/machines</td>
</tr>
<tr>
<td></td>
<td>select cutting tools and cutting data in accordance with the job at hand</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preparation to work - checking the machines</td>
<td>- Perform checking operations before starting work (operability of machine systems, states of tools, technological parameters)</td>
<td>15. Perform visual and technical test of the machine before starting work.</td>
<td>6) Sets and enters the driver of CNC machine before machining</td>
</tr>
<tr>
<td></td>
<td>- Prepare for work (tool correction-value stores, zero point store contents, tool distribution, CNC program, checking main positions)</td>
<td></td>
<td>7) Downloads the machining software, tools/machines</td>
</tr>
</tbody>
</table>

See appendixes – excell tables
Levels of the NQFs for analysed LO’s

<table>
<thead>
<tr>
<th></th>
<th>Mechanical Engineer</th>
<th>CNC Operator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Sweden</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Latvia</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Poland</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Hungary</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Italy</td>
<td>6</td>
<td>3</td>
</tr>
</tbody>
</table>
## Language of learning outcomes

Similar language (EQF) – in all cases only small differences of editorial character:

<table>
<thead>
<tr>
<th>Country</th>
<th>Example: „use of documentation”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>&quot;plan work based on drawings, other documents and procedures&quot;</td>
</tr>
<tr>
<td>Latvia</td>
<td>2. Read drawings. 3. Read technical documentation</td>
</tr>
<tr>
<td>Poland</td>
<td>Uses technological documentation for CNC machine tools / machines in order to identify their technical parameters</td>
</tr>
<tr>
<td>Hungary</td>
<td>&quot;Study the drawing of the new workpiece, technological documentation &quot;</td>
</tr>
<tr>
<td>Italy</td>
<td>understand the technical drawings</td>
</tr>
</tbody>
</table>
Differences and similarities in learning outcomes descriptions, pp. 25-28

- General similarities in "core elements"

- Different approaches to general knowledge;

- Different importance of competences, e.g. responsibility

- Almost identical description of skills

But:

- Differences can be explained on the basis of context information

- Differences do not jeopardise the possibility of comparison
The comparative analysis of the methods of levelling found that there are two main approaches to levelling in the countries participating in the pilot project:

- (1) By analysing the learning outcomes in order to find the relevant level descriptors that best fit them (referred to as the “best fit method”. This is a kind of “bottom-up” approach: the provider of the qualification applies to the qualifications register or other institution for an evaluation of the learning outcomes and assignment to a NQF level,
• (2) By formulating learning outcomes according to the level descriptors published and used as an instruction for designing the content of a qualification. This is a kind of “top-down” method: the designers of the qualification are adapting it to existing NQF requirements. For provisional working use, the team named this method “full-fit” (?).
  • cases of PL, HU, LV, NO

• Additional questions for gathering data for the comparison – see p.31
Methods of levelling

• Do these two approaches have something in common? Can we find the “core essential elements” of all methods? Yes:
  • the learning outcomes of a qualification should be referred to the level descriptors,
  • their mutual reference is evaluated / confirmed by the quality assurance systems.

• These elements are present in the all analyzed NQFs. And have to be present in all NQFs (see also the referencing criteria). If not – strong recommendation for presenting them.

Other recommendation:
• Typology of qualifications helpful in context of levelling methods
• illustration by actual qualifications helpful
• Experienced evaluator necessary
“Actual qualification” fiche - for mechanical engineer and CNC operator

• The objective – to illustrate and explain similarities / differences in the qualifications description if needed
• Used in the pilot project in not satisfactory way (till now)

• Main elements of general specification (pp.34-36):
  • Title of diploma (bilingual):
  • Institution awarding the qualification
  • Institution responsible for validation of qualification
  • ……..
• Level of NQF: 6
• Workload (e.g. ECTS):
• Period of study/programme:
• Enrollment / access rules
• Diploma Supplement contents
• Who awards the number of the NQF level?
General conclusions of the project

The national approaches to describing qualifications show great diversity of qualifications descriptions, levelling etc. ..

• **Despite these differences**, the analyses presented in the report show that **tools** which help to submit, present and organise information on similar qualifications **can be developed**.

• The fiche can be used as a common tool to determine the comparability of qualifications

There are **three broad areas that need to be included in comparisons** of qualifications.

• **Learning outcomes** - it is possible to identify the common “core” of their description which allows qualifications to be compared.

• **Context information** - to understand the variability of information and approaches at the national level. There is a common “core” of context information. The EQF terminology allows a common approach to describing and comparing qualifications.

• **Method of levelling** – the core elements identified as relation between learning outcomes and level descriptors and the quality assurance of the process of levelling.
Lessons learnt

1. The national context matters.

2. There is significant diversity of national approaches to describing and levelling qualifications. This diversity is an important part of the European qualifications landscape and should be maintained.

3. The horizontal comparisons exercise confirmed that the “bottom-up”, peer work based approach adopted in the pilot project gives promising results.
Lessons learnt (2)

4. the cooperation between the countries involved in the HC developed:
   • better common comprehension and understanding
   • better transparency
   • knowledge about methods of levelling
   • mutual trust

5. which was a “side product” of common work but answering the general objectives of the project
Missing elements

- Scotland
- Deeper analysis of actual qualifications and their role in horizontal comparison
- Wider list of recommendations like:
  - Analysis of recommended corrections to the referencing criteria (if any)
  - Discussion on importance of the HC considering proposed revision of the EQF recommendation
  - List of issues to be developed in the guideline
  - Roadmap for the AG work after the pilot project
- ??
Recommendations

• To further continue the work on horizontal comparison with the tools prepared in the HC pilot project.
• To respect the diversity of national descriptions of qualifications and methods of levelling – but to protect the ability to make comparisons.
• To make good use of the context information giving additional insight into the originality of qualifications and explaining the potential differences between qualifications named and levelled in the same way.
• To continue the good tradition of the soft coordination approach, opening – in the case of qualifications frameworks – the floor to transparency, trust, and better understanding among countries.
• To prepare and publish the guideline for the horizontal comparison of qualifications.
• ?? - waiting for the AG contributions
Challenges

- Definitions/characteristics of terms relevant to “comparability”
  - Like “best-fit” or “full-fit” method
- Typology of qualifications?
- Further comparisons
  - One-to-one country comparison? If not
    - In groups of how many countries?
    - How to group countries? On what basis?
    - Voluntary exercise continued?
- Mechanical engineer and CNC operator as “easy cases” – how about more sophisticated ones?
- International sectoral qualifications – how to level?
- Capacity building of “comparability experts”
- Typology of qualifications regarding method of levelling (see also the NQF-in project)
Next steps

• By 24 December – collecting comments and contributions from the AG members
• 10th January – pre-final version of the report ready
• 13th January – final meeting of the HC team in Warsaw
• 31 January – final report sent to the AG
• February 2017 – presentation of the final report on the AG39
• May? 2017 – PLA on the HC in Warsaw:
  • Dissemination of the HC pilot project results,
  • Instruction on making use of the fiche,
  • Workshops: one each for 2-3 countries trying to compare “themselves” (chosen qualifications) with the help of the fiche and the general methodology elaborated in the HC pilot project.
Thank you for your attention!
Support to central government administration, awarding bodies and quality assurance institutions in implementing stage I of the Integrated Qualifications System

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