

PM-ZERT

Certification Body of the GPM

Guidelines for candidates Level D – A

- General Guide -

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Relevant documents

The PM-ZERT documents listed in the following table are required either for the preparation for certification or are necessary for the application documents to be submitted. Their content also completes the comprehensive information intended by this guide. The sequence of validity of the individual documents is regulated in General Guide Z01.

Please familiarize yourself with the following before submitting your application.

Document		To fill in
No.	Name	Yes/No
	ICB 4, Individual Competence Baseline	No
	ICR 4 public, IPMA Certification Regulation public version	No
A01	Aktuelle Termine und Gebühren	No
F01	Application for certification (initial certification, higher level certification, recertification) with self-assessment, evidence in projects, ESR and determination of complexity	Yes
Z01 General Guide	General Guide	No
R03	Ethics Code of the GPM	No

Table 1: Application documents

List of abbreviations, terms and definitions

Abbreviation	Explanation
ICB	Individual Competence Baseline
ICR	IPMA Certification Regulation (internal document for certification bodies)
ICR Public	IPMA International Certification Regulations (Public)
CE	Competence Element
KCI	Key Competence Indicator
ESR	Executive Summary Report
LA	Lead Assessor
CoA	Co-Assessor
Applicant	Person who has applied to enter a certification process
Candidate	Person who has satisfied the entry requirement of the certification process

Table 2: List of abbreviations, terms and definitions

The Guidelines

- This guideline: General introduction to the certification system, as well as a detailed description of the re-certification and higher-level certification
- Detail-Leitfäden: Erstzertifizierung IPMA Level D, IPMA Level C, IPMA Level B und IPMA Level A

The structure of the guides is as follows:

- XXX_Do_Title_ICB4_Version.extension.
- XXX stands for the short name of the document, which was already used under ICB3 (the guide was also called Z01 under ICB3)).

Explanation:

- „Do“ stands for domain (PM stands for project management).
- „Title“ is a meaningful abbreviation of the content of the document.
- „ICB4“ stands for the basis according to which the certification is carried out.
- „Version“ specifies the version number of the document.

GPM attaches great importance to a differentiated responsible, non-discriminatory and gender-equitable use of language in publications. Whenever the generic masculine is used, this is to be understood as a neutral grammatical expression and in no way implies any discrimination against the opposite sex. Further information on the "gender-fair spelling" of GPM can be found at: www.gpm-ipma.de/utilities/impressum_datenschutz.html

1 Validity

This document is valid as of 15.01.2022
Version 8 is still valid until 14.08.2022
All previous versions are invalid

2 The certification processes

2.1 General information

The IPMA 4-L-C system was developed for three domains: Project, program and portfolio management and four competence levels:

- IPMA Level A
- IPMA Level B
- IPMA Level C
- IPMA Level D

The admission criteria and areas of responsibility expected for project, programme and portfolio management are defined for each role.

The candidate must demonstrate competence over several stages in the certification process.

The competence level of a candidate is assessed by assessors trained in the IPMA certification process. The IPMA certification process provides the framework for a structured assessment that is fair, valid and reliable based on evidence from candidates

Recertification is required after five years for all IPMA levels. It is based on proof of continuous activity in project, program or portfolio management at the appropriate level and proof of continuous further training.

The certification of persons in accordance with the IPMA 4-L-C system is intended to ensure that the certified person meets the requirements for the corresponding competence. The globally recognized assessment procedures and regular reassessments of the competence of the certified persons provide security and trust in the respective certification programs for individuals

2.2 IPMA 4-L-C

The IPMA 4-L-C system has four levels - Level A, B, C and D. The definitions of the IPMA levels are based on the following core criteria:

- Level A expects the ability to lead other people in very complex projects (programs or portfolios) at a strategic level throughout the lifecycle (if applicable).
- At level B, the ability to lead other people in complex projects (programs or portfolios) is expected throughout the lifecycle (where applicable).
- At level C, the ability to manage other people in projects of medium complexity throughout the life cycle is expected through the application of knowledge/theory in all relevant competencies.
- Level D is only built up in the form of knowledge, related to all relevant competences.

As already mentioned, there are three domains in the IPMA 4-L-C system: project, program and portfolio. In these three domains, the projects have four levels (A, B, C and D), the program and portfolio each have two levels (A and B).

All certification processes are described in detail in individual guidelines that are valid for the respective domain (project, program and portfolio management) and the respective level (see also Appendix). The entire procedure is based on the international standard ICB (Individual Competence Baseline Version 4) of the IPMA International Project Management Association. It contains Competence Elements (CE) and Key Competence Indicators (KCI). CE and KCI are described in detail in the

"Individual Competence Baseline", published by IPMA. This guide describes the certification procedures in the Project Management domain.

Chapter „3 *Taxonomy according to Bloom*“ of this guideline is relevant for all levels. It depicts the assessment criteria according to which the performance of the candidates - or certificate holders in the case of recertification - is measured.

2.3 Certification: admission criteria

The profiles in the Project Management domain are assigned the following role descriptions and qualifications according to ICR4:

2.3.1 Level D

An IPMA Level D certification requires that the candidate has knowledge of the CEs of the Project Management domain. Candidates usually have extensive project management skills and can work in a project team.

Qualification: No previous knowledge is required and only knowledge related to project management is assessed.

Typical roles

- Work package responsible person
- Project management assistance, Project Office employee
- Project Management Office employees
- Specialist for sub-disciplines in project management
- Project controller, project buyer
- Resource coordinator.

In addition to the information in the Z01D guide, particular attention should be paid to the chapter „3 *Taxonomy according to Bloom*“.

2.3.2 Level C to A

IPMA Level C: Certified Project Manager

IPMA Level C certification requires the candidate to have performed a project management function in a moderately complex project environment within an organization.

Qualification: Within the last 6 years, the candidate must have at least three years experience as a project manager in projects of moderate complexity or at least three years experience in a responsible project management function supporting the project leader in complex projects. The period for the proof can be extended by four years to ten years with justification..

Typical roles

- Management of a project or sub-project
- Project coordinators
- Commercial project manager, technical project manager
- Quality Manager
- Staff project management
- Head of project office.

IPMA Level B: Certified Senior Project Manager

An IPMA Level B certification for project management requires that the candidate has acted in a complex project environment.

Qualification: Within the last 8 years, the candidate must have at least five years of experience as a project manager, including at least three years in a responsible leadership role in the management of complex projects. The period for the proof can be extended by four years to twelve years with justification.

Typical roles

- Senior Project Manager
- Project controller (plant, investment)
- Site manager (in accordance with Landesbauordnung LBO)
- Technical project manager
- Overall project manager
- Head of large project office.

IPMA Level A: Certified Project Director

An IPMA Level A certification for project management requires that the candidate has acted in a very complex project environment that has a strategic impact on the organization.

Qualification: Within the last 12 years, the candidate must have at least five years experience as a project manager in a responsible leadership role in very complex projects, at least three of them at strategic level. The observation period cannot be extended.

Typical roles

- Leading a large project organization, a large project team or project management teams
- Project manager for highly complex major projects and major project manager in programs.

In addition to the information given in the guidelines for the respective level, the chapters „3 *Taxonomy according to Bloom*“, „2.4.5 *Executive Summary Report* *)“ and „4 *Complexity*“ of this guideline must be taken into account.

2.4 Certification: process steps

No.	process step	Certification				
		D2	D1	C	B	A
1	Approval					
1.1.	Application for certification (F01) *)	x	x	x	x	x
1.2.	Curriculum vitae	./.	./.	x	x	x
1.3.	Structured Evidence					
1.3.1.	- Executive Summary Report*)	./.	./.	x	x	x
1.4.	Self-assessment of knowledge and skills (F01) *)	x	x	x	x	x
1.5.	References (F01)	./.	./.	x	x	x
2	Assessment					
2.1.	Level Report	./.	x	x	x	x
2.2.	Written exam	180 min	90 min	120min	180min	./.
2.3. ¹	Roleplay based Scenario (Workshop)	./.	./.	x	x	x *)
	Final Interview *)	./.	./.	60min	90min	90min
2.4. ²	Extended Interview*)	./.	./.	90min	120min	./.
3	Completion					
3.1	Certificate decision	x	x	x	x	x

Table 3: Process steps

*) You will find more detailed information on these steps in the following, otherwise they are contained in the level-specific guides.

The Assessment modules 2.3 or 2.4 are alternatively. PM-ZERT decides which path to use in the assessment: Assessment with Workshop and Final Interview or assessment without workshop but with Extended Interview.

The assessment module 2.3 is the standard procedure. If no information is available from PM-ZERT on the defined procedure (2.3 or 2.4), the standard procedure 2.3 is used.

Candidates will be informed by PM-ZERT about the path at least two weeks before the Assessment.

2.4.1 Rules for postponing single process steps

In individual cases, already approved candidates cannot participate in the next process step. This results in an increased administrative burden for PM-ZERT, for which the Fee Schedule (A01) provides

¹ Workshop and Final Interview (2.3) are alternative to Extended Interview (2.4).

² Extended Interview (2.4) is alternative to Workshop and Final Interview (2.3).

for administrative fees, which only come into effect if valid reasons for the postponement cannot be recognised.

By postponing process steps, the total duration of the certification process (starting with the approval by PM-ZERT) may not be extended over a period of **18 months**. If this maximum period is exceeded, the termination fee will be due in accordance with the Fee Schedule (A01). After each postponement, a new date must be agreed with the PM-ZERT office.

2.4.2 Interruption of the certification process

If the admission to the next process step is older than 12 months at the time of its execution, the admission must be newly carried out by an assessor, possibly application documents must be newly prepared. There are no additional fees.

A certification procedure must not take longer than 18 months in total.

2.4.3 Recognition of disabilities

Applicants with physical disabilities (visual, hearing or movement impairments) or communication difficulties (language skills, cultural background) must point this out in their application documents and submit an informal application for suitable facilities to the PM-ZERT office. In consultation with the PM-ZERT office, suitable facilitations can then be agreed discreetly. Any indications of an impairment that PM-ZERT becomes aware of two weeks or later before the examination date can no longer be taken into account.

2.4.4 Application form (F01) *)

Spreadsheet „Project list“, „schedule“, P1 to P12, „Complexity“ and „Assessors“

The spreadsheet "Project list" of the document "F01" is a multipart document for the creation of a quantitatively and qualitatively meaningful proof of own activities in project management.

In the "Project list" spreadsheet of the "F01" document, the start and end dates of the projects processed ("Project duration" in the spreadsheet) as well as the start and end dates of your own activity within the projects ("Active in role" in the spreadsheet) must be specified.

The projects that are selected for the Executive Summary Report (see next chapter) are marked under the column heading "ESR Project Indicator". Three entries are possible:

- "ESR" for ESR projects,
- "ESR 1" for the project for which the report is being written,
- no input, for all others.

If the data for "Project duration" and "Active in the role" are identical, they can be copied. In any case, all 4 appointment columns must be filled in, otherwise the activity will not be calculated.

The projects entered in the "Project list" spreadsheet are automatically displayed as bars in the "Schedule" spreadsheet by the Excel program. The average employment of column H of the spreadsheet "Project list" is included.

The total capacity utilization for projects running in parallel is added up at the bottom of the graphic.

A total load >120% is not recognized.

In spreadsheets P1 to P12, the profiles for the projects entered in the "Project list" spreadsheet must be completed.

If the own subproject/project is part of an overall project or program or if other projects or subprojects have essential interfaces to the own project, information should be given under the heading "Remarks".

The completion of the spreadsheet "Complexity" for all projects is described in chapter „4 Complexity“.

Assessors' spreadsheet is used by the assessor for their assessment..

2.4.5 Executive Summary Report *)

In the Executive Summary Report (ESR), the candidate should provide evidence of experience in managing projects at the level he/she aspires to for up to three projects corresponding to the complexity of the level applied for. The detailed information on all ESR-projects also serves the assessor to check the complexity. The information in the spreadsheets P1 to P12 in the "F01 Application" should refer to experience in project management and the management of project teams. The candidate selects one of his specified projects for his report and describes it as ESR 1.

The following explanations are always based on three projects. If there are only one or two projects, the explanations must be adjusted accordingly. The number of pages to be used for the description of each project remains unchanged.

Spreadsheets P1 to P12 must also be submitted with the ESR (not all sheets must be used, but only as far as necessary for the required evidence of the project durations). While the ESR requires essentially textual explanations of the projects, the explanations in the spreadsheets P1 to P12 are to be provided in tabular form for the projects which the candidate submits as proof of project experience at his level. A one-page project profile must be completed for each project. In addition, the candidate's assessment of the complexity of the projects must be entered in the "Complexity" spreadsheet. Explanations to the worksheets P1 to P12 are given in the file. It is the task of the candidate to ensure that the information given in both documents is consistent in terms of content.

All projects P1 to P12 - including the ESR-projects - are used equally to assess the PM activities of the candidate.

Structure and content of the Executive Summary Report

The binding structure is repeated for the up to three projects to be described, but with decreasing scope (less detailed). If no information is possible for individual areas, these chapters must be marked "no information possible". If further projects are required to demonstrate project experience, these should initially only be described in worksheets P4 to P12. If necessary, the assessor may request further information.

Project 1 (ESR1)

Details of the project selected by the candidate as the basis for his project report. The text must be limited to 4 pages.

(1) How is the project embedded in the own company?

- Name, industry and core business of your own company
- Which projects are carried out?
- How are projects carried out in the company?
- Importance of this project for the company

(2) Own role in the company and in the project

- Organizational integration in the company's organization
- Area of responsibility in the project
- Organizational form of the project

(3) Brief description of the project content

- Objectives set and results achieved
- Key Stakeholders
- Explanations and justifications for the complexity data

(4) Management and leadership

- Level C: what management methods and tools were used? How was the project team led?
- Level B/A: The use of management and leadership in project realisation and in the

representation/negotiation of the project within the own company and externally (e.g. client or subcontractor) are to be described.

(5) Major challenges and risks in the project

- The significant/strategic risks must be described.
- Significant deviations from the plan and how they are dealt with must be described.
- Possible conflicts and/or crises, how to deal with them and their impact on the project must be described.

Project 2 (ESR)

Information on the next relevant project in the opinion of the candidate. The text is limited to 2 pages. If this project is carried out at the same company and with the same role, a reference to the information in ESR1 is sufficient.

Project 3 (ESR)

Information on the next relevant project in the opinion of the candidate. The text is limited to 2 pages. If this project is carried out at the same company and with the same role, a reference to the information in ESR1 resp. Project 2 is sufficient.

2.4.6 Interview *)

The STAR methodology can be used in (extended) interviews. The STAR Methodology allows information about a person's abilities and behaviour in certain situations to be obtained with the help of four questions.

Situation

What was your starting point?

Task

Which task did you derive?



Result

What result did you achieve with it?

Action

What have you done concretely?

The questions are based on the requirements of the ICB4. The methodology can be applied in all competence areas (Perspective, People and Practice).

2.4.7 Extended Interview

The extended interview leads to the final assessment of the candidate. It is an dialogue between the candidate and two assessors.

The procedure is described in detail in the Level C and B guidelines.

3 Taxonomy according to Bloom

The Bloom stages are the evaluation standard for all test steps and evidence for initial, higher and recertification. Performance and evidence at CE level are evaluated:

	ID	Competence Element	D	C	B	A
Perspective	4.3.1.	<i>Strategy</i>	1	3	4	6
	4.3.2.	<i>Governance, structures and processes</i>	2	3	4	6
	4.3.3.	<i>Compliance, standards and regulations</i>	2	2	4	4
	4.3.4.	<i>Power and interest</i>	2	3	5	6
	4.3.5.	<i>Culture and values</i>	2	3	4	6
People	4.4.1.	<i>Self-reflection and self-management</i>	3	3	4	6
	4.4.2.	<i>Personal integrity and reliability</i>	2	3	4	6
	4.4.3.	<i>Personal communication</i>	3	4	6	6
	4.4.4.	<i>Relations and engagement</i>	2	3	4	5
	4.4.5.	<i>Leadership</i>	2	3	5	6
	4.4.6.	<i>Teamwork</i>	2	3	5	6
	4.4.7.	<i>Conflict and crisis</i>	2	3	5	6
	4.4.8.	<i>Resourcefulness</i>	2	3	5	6
	4.4.9.	<i>Negotiation</i>	2	3	4	6
	4.4.10.	<i>Results orientation</i>	2	3	6	6
Practice	4.5.1.	<i>Project design</i>	2	3	5	6
	4.5.2.	<i>Requirements and objectives</i>	3	4	5	6
	4.5.3.	<i>Scope</i>	3	3	5	6
	4.5.4.	<i>Time</i>	3	4	5	6
	4.5.5.	<i>Organisation and information</i>	3	3	6	6
	4.5.6.	<i>Quality</i>	1	3	5	5
	4.5.7.	<i>Finance</i>	2	3	5	6
	4.5.8.	<i>Resources</i>	2	4	5	6
	4.5.9.	<i>Procurement</i>	1	3	6	6
	4.5.10.	<i>Plan and control</i>	2	4	6	6
	4.5.11.	<i>Risk and opportunity</i>	3	3	4	6
	4.5.12.	<i>Stakeholders</i>	3	3	4	6
	4.5.13.	<i>Change and transformation</i>	1	3	4	5

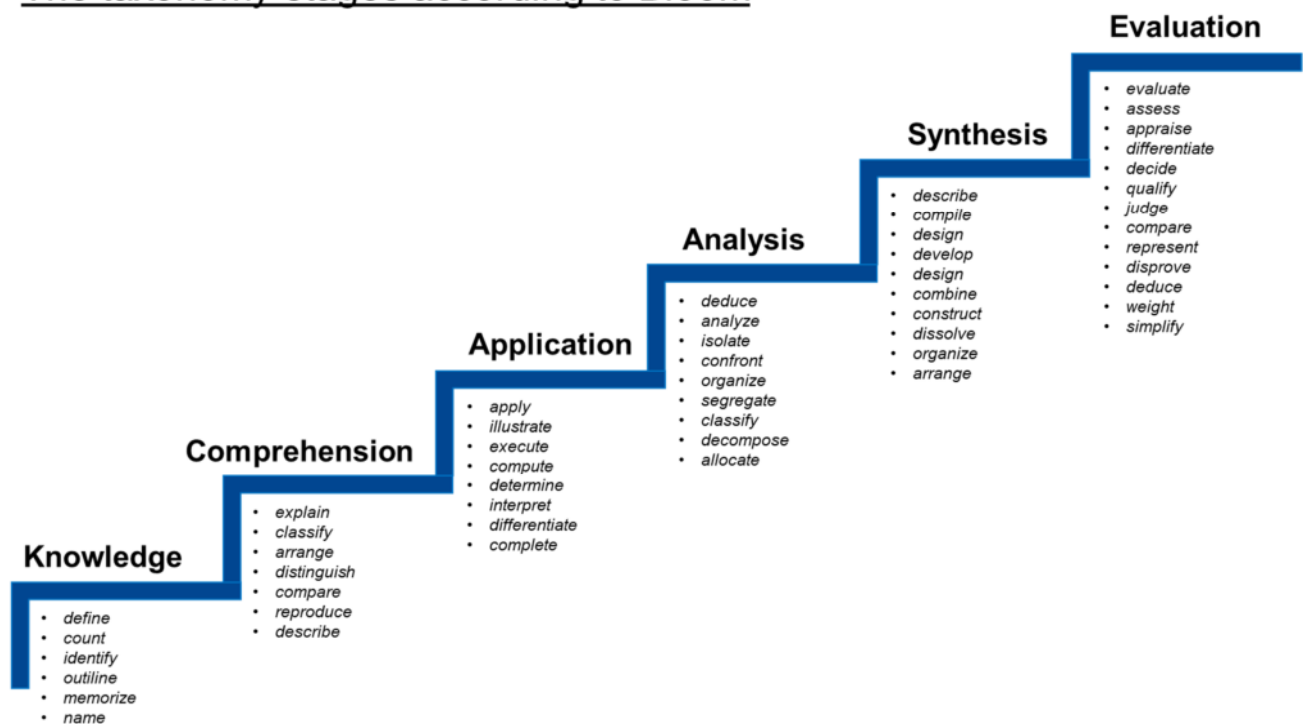
Table 4: Assignment of the Bloom stages to the CE according to ICB4

In table „Table 4: Assignment of the Bloom stages to the CE according to ICB4“ the CEs in columns D, C, B and A are assigned the Bloom stages at which the requirements for the respective level are set.

3.1 Explanation of Bloom Stages 1-6

The Bloom stages are shown in the following diagram:

The taxonomy stages according to Bloom



Graphic following Bloom, B. S. "Taxonomy of Educational Objectives. Handbook 1: Cognitive Domain. David McKay Company, New York 1956.-Dt. Taxonomie von Lernzielen im kognitiven Bereich. Beltz." (1972).

The following description of the Bloom stages can be found in the "Individual Competence Baseline for Project Management", published by IPMA:

To apply the IPMA ICB for individual competence evaluation and development, a comprehensive table with the competence elements described in the IPMA ICB and Bloom's taxonomy can be used. The different levels of competence include:

- **Knowledge:** Exhibit memory of learned materials by recalling facts, terms, basic concepts and answers;
- **Comprehension:** Demonstrate understanding of facts and ideas by organizing, comparing, translating, interpreting, giving descriptions and stating the main ideas;
- **Application:** Using acquired knowledge to solve problems in new situations by applying acquired knowledge, facts, techniques and rules;
- **Analysis:** Examine and break information into parts by identifying motives or causes, make inferences and ind evidence to support generalisations;
- **Synthesis:** Build a structure or pattern from diverse elements and act of putting parts together to form a whole; compile information together in a diferent way by combining elements in a new pattern or proposing alternative solutions;
- **Evaluation:** Present and defend opinions by making judgments about information, validity of ideas or quality of work based on a set of criteria.

4 Complexity

For the measurement of complexity, a scheme was developed in accordance with IPMA specifications, which is described below. It is listed in document F01 and must be completed there for each project listed (project list P1 to P12). The assessor evaluates the information provided on his part.

- Complexity according to this scheme is divided into three parts:
- Indicators related to technical capabilities
- Indicators related to the context
- Indicators related to management and leadership.

4.1 What does complexity mean?

The understanding of complexity in projects is shown in the following table (or "F01_PM_Application“):

Scoring scheme for evaluating the complexity of projects						
Group	with regard to	Criteria to be evaluated	less complex: 1	limited complex: 2	complex: 3	very complex: 4
Indicators related to technical capabilities	Objectives and results	Number and diversity of individual goals, taking into account the goals and expectations of the relevant stakeholders, different target categories: Process goals, usage goals (business case), operationalizability, transparency and dependencies	very few clear Goals, all quantitatively is specified, operable	few targets, well formulated, few conflicting goals	several targets differential of a kind, partly unclearly defined	many, sometimes competing goals, strategic and political goals, hidden goals, utilization goals
	Tasks and Processes	Scope of tasks, assumptions and boundary conditions and their dependencies, processes, tools and methods used, team and communication structures used	known tasks and boundary conditions; few standard/reporting procedures	several tasks, supplemented by assumptions; use of known processes and tools, some reporting requirements	extensive system of tasks and assumptions; many factual factors; partial use of new tools and processes, reporting requirements	very complex tasks, extensive factual environment; requires the use of extensive processes and tools, strict reporting requirements
	Resources and Finances	Acquisition and provision of the necessary budgets and their management; number of donors; availability and quality of the necessary (human and other) resources; resource management and procurement processes	Budget determination without negotiation, simple cost monitoring; resources available, minor resource conflicts; minor procurement processes	Budget determination and negotiation; negotiation of the required resources, partly external resource procurement	Budget and resource procurement in competition with other projects; essential procurement processes	Procurement of essential financial resources, internal and external financing by various donors; management of essential subcontractors
	Opportunities and risks	Assessment of opportunities and risks in the project; determination and control of the risk system; derivation of valid measures; determination and use of opportunities; application of tools for controlling the risk budget	few risks at a manageable level, no opportunity management	several risks and opportunities; stable risk system; management of a risk budget	several risks with a limited amount of damage; possibility of exploiting opportunities to relieve the project	Extensive risk potential including high strategic risks; application of valid management options; reporting in accordance with CONTRAGUE

Scoring scheme for evaluating the complexity of projects						
Group	with regard to	Criteria to be evaluated	less complex: 1	limited complex: 2	complex: 3	very complex: 4
Indicators related to the context	Strategy, Stakeholders	Influence of the corporate strategy, effects of the project on the company, stakeholder interests; Laws and regulations	few strategic influences; project is purely operationally oriented	Stakeholder interests influence the project Limited influences from the corporate strategy	Many components (?) of different kind	Project has significant impact on the company and its success; strong impact of laws and regulations
	Permanent organization	Scope of networking via project interfaces with the structures, reporting and decision-making paths of the parent organisation	strong differentiation of the project from the parent organisation, decisions are made essentially in the parent organisation, many similar projects have already been carried out in the company	clear interfaces to the parent organisation, e.g. via management committee; reporting and decision-making processes limited and clearly defined Project has little impact on processes of the parent organisation, similar projects have already been carried out in the company	many operative Interfaces have an effect on the project; reports and decisions make up a considerable part of the work, project has effects on processes of the parent organization, few similar projects have already been carried out in the company	Strong influences of the parent organization on strategic level; decisions by negotiations with the parent organization, project has strong effects on processes of the parent organization, project is new for companies
	Socio-cultural influences	Influence of socio-cultural differences in the project team, especially in distributed or cross-company teams	no effects to be expected (project at one location, one language, homogeneous project group)	little impact to be expected	Impacts due to locally distributed teams, multiple languages or heterogeneous cultures require leadership measures in individual cases	Effects resulting from locally distributed teams or large teams from different companies and cultures require extensive leadership measures.
Indicators related to management and leadership	Leadership and teamwork	Scope of leadership, team building and control measures	almost all team members have already worked with PL, PL has experience in the management of teams over 5 J, governance requirements are clearly defined, the project team has high PM Skills	very many team members have already worked with PL, PL has experience in Mgt of teams over 3 J, governance requirements are partly defined, the project team has PM Skills	many team members have already worked with PL, PL has experience in Mgt of teams over 1-2 J, some governance requirements are clearly defined, the project team has some PM skills	few team members have already worked with PL, PL has experience in Mgt of teams less than 1J, few governance requirements are defined, the project team has very few PM skills
	innovation	technical novelty of the project and its impact on resource selection and training during the project; dealing with novel approaches and results	no need for action due to minor novelty, e.g. repeat projects	some measures required as a result of the novelty in individual areas	Novelty of the project object and/or preparatory qualification measures conditioned by processes	Novelty of the project object and/or of processes in connection with large project volume requires planning of qualification, but also intensive risk management
	Autonomy and responsibility	The project manager's scope of decision-making and responsibility; extent of delegation to the project team; representation of the project vis-à-vis the entire social environment.	little autonomy/leeway for the PL in terms of decisions and representation of the project to the outside world	Negotiation of requirements and functional specifications; scope for design arises mainly from change processes	Project manager represents the project and thus also the company towards external stakeholders	Extensive scope for responsibility and decision-making, e.g. through power of attorney or signature regulations

Table 5: Scoring scheme for evaluating the complexity of projects

4.2 What complexity is expected for what level?

Complexity must be specified for Level C, B and A projects. Projects at each level are expected to have the following levels of complexity:

Level	Complexity k
C	$16 \leq k < 25$
B	$25 \leq k < 32$
A	$32 \leq k$

Table 6: Complexity of projects per level

5 Higher-level Certification

A higher-level certification always presupposes the existence of a valid certificate and the fulfilment of the requirements described in the guideline for the level in question.

A higher-level certification is only possible up to the next level.

The candidate must submit the "Application for Certification" (F01) for the desired degree. The application deadlines set for open certification rounds apply to the submission of the application.

No.	Process Step	Higher-Level Certification		
		D to C	C to B	B to A
1	Approval			
1.1.	Application for certification (F01)	x	x	x
1.2.	Curriculum vitae	x	x	x
1.3.	Structured Evidence			
1.3.1.	- Executive Summary Report	x	x	x
1.4.	Self-assessment of knowledge and skills (F01)	x	x	x
1.5.	References (F01)	x	x	x
2	Assessment			
2.1.	Level Report	max. 25 pages / max. 15 pages appendix	max. 25 pages / max. 15 pages appendix	max. 25 pages / max. 15 pages appendix
2.2.	Written exam	120min	180min	./.
2.3.	Final Extended Interview ¹⁾	90min	120min	120 min
3	Completion			
3.1.	Certificate decision	x	x	x
The total duration of the procedure from the date of admission to the last examination step (2.4) shall not exceed 18 months.				
Each examination step may be repeated no more than once. The repetition must take place within 12 months. The total duration of the procedure remains unaffected.				

Table 7: Procedural steps for higher-level certification

The procedural steps described in „Table 7: “ apply to a higher-level certification³ irrespective of whether the existing certificate was acquired in accordance with the regulations of ICB3 or ICB4. This rule can be deviated from if a comprehensive revision of the regulations has been carried out between the issue of the first certificate and the application for higher-level certification (e.g. replacement of ICB 4 by ICB 5 or higher).

The process of the Extended Interview to be conducted in the context of Level C, B or A certification is explained in chapter „2.4.7 Extended Interview“ of this guide.

³ If first and higher level candidates take part in an assessment Level C and B, the workshop is generally binding for all candidates. The higher level candidates therefore undergo the same assessment as the first level candidates. The variant with workshop can also be chosen by the higher level candidate himself.

6 Recertification

The basic prerequisite for a recertification procedure is a valid certificate.

	Level A	Level B	Level C	Level D
Domain-related experience required by the certificate holder	Minimum evidence of 30 months of practical experience over 5-year period			./.
	Complexity			./.
	Leadership of others		Management of others	./.
	Minimum of 35 hours' evidence of continuing professional development per annum (175 hours total) since the last (re-) certification			

Table 8: Requirements for recertification

When the validity date documented on the certificate is reached (5 years for all IPMA 4LC certificates), the certificate loses its validity. By this date, recertification for certificate renewal should have taken place, which must be applied for in writing by the certificate holder. It is the responsibility of the certificate holder to initiate the recertification procedure in good time and to provide the corresponding proof of activity for the specified period of validity of the certificate.

Legally protected periods of non-employment, e.g. maternity leave and child-raising leave, must be proven by the certificate holder and extend the period under consideration by the duration stated in the certificate. The validity period of the new certificate begins with the date of the successful recertification. If the current email address of the certificate holders is available, they will receive a cover letter with all necessary information approx. 2 to 3 months before their certificate expires. The submission of the recertification documents takes place online for all levels. If the certificate holders do not receive a cover letter, they should contact PM-ZERT directly. The aforementioned responsibility of the certificate holder to initiate the recertification procedure in good time remains unaffected.

Certificate holders whose certificate has lost its validity but whose invalidity period is less than 6 months may, in justified cases, still achieve the "revived renewal" of their certificate by means of a recertification application providing the necessary evidence for the corresponding period. All application documents required for the relevant level must have been received by the PM-ZERT secretariat within this granted period.

In all cases, the entire procedure must be completed no later than 3 months after allocation to the verifying assessor. The certificate holders will be informed by PM-ZERT on the day of allocation.

The PM-ZERT office shall inform the certificate holders on the website of all documents to be submitted in order to demonstrate compliance with the certification requirements:

No.	process step	Recertification			
		Level D	Level C	Level B	Level A (Domäne Projekt)
1	Approval				
1.1.	Application for certification (F01)	x	x	x	x
1.2.	Curriculum vitae	./.	x	x	x
1.3.	Structured Evidence ⁴				
1.3.1.	- Structured verifications	./.	x	x	x
1.3.2.	- Evidence of continuing professional development (F06)	35h p.a.	35h p.a.	35h p.a.	35h p.a.
1.4.	Self-assessment of knowledge and skills (F01)	x	x	x	x
1.5.	References (F01)	./. ⁵	x	x	x
2	Assessment				
2.1.	Interview	In case of doubt max. 60min	In case of doubt max. 60min	In case of doubt max. 60min	In case of doubt max. 60min
3	Completion				
3.1.	Certificate decision	x	x	x	x

Table 9: Process steps in recertification

The CV according to 1.2 „Table 9: Process steps in recertification“ must show personal and professional development in relation to project management - since the initial or last recertification. The evidence of continuing professional development (F06) according to 1.3.2 in „Table 9: Process steps in recertification“ includes information on self-study, participation in training courses and conferences, own publications and lectures. In addition, the feedback form for certificate holders (Z06RZ) must be completed and submitted.

The following special feature applies to the recertification of Level A holders on the basis of ICB3: The candidates prove that they have undergone the further professional development required under 1.3.2 in

⁴ The information on the continuing professional development shall be signed by the certificate holder. For each indication of continuing professional development at least the following information shall be provided:

- Name of the Continuing Professional Development Measure;
- Description of the activity;
- Date (dates) and hours worked;
- CEs covered by the continuing professional development and a summary of the lessons learnt and the resulting benefits

For levels C to A, the proof of practical experience listed in „Table 8: Requirements for recertification“ shall also be provided.

⁵ References need only be given if PM activity is listed in F01.

„Table 9: Process steps in recertification“ and remain project directors under ICB3. This is possible as long as the programme and portfolio management domains are not yet established. But not later than the beginning of 2021.

The required documents are available at www.pm-zert.de in the recertification download package. The completed documents will then be uploaded using our online tool www.candidate.pm-zert.de.

The following procedure applies to all certificate holders:

The information in the evidence is formally and substantively checked and assessed and documented by a PM-ZERT assessor according to a specified scheme.

The assessment of the required data only takes into account the activities during the validity period of the certificate.

The required assessment criteria are met if

- the PM practice (information in the spreadsheets P1 to P12 in document F01_PM_Application) was further deepened within the PM areas corresponding to the certificate level and a degree of workload of at least 50% was achieved by the PM activity corresponding to the certificate level. PM activities below the certificate level are not recognized as proof. PM activities corresponding to level A are also recognised for the respective certificate level (B and C) as long as certification to level A is not or cannot be sought. PM activities of this type are also entered with an exact role description, duration and degree of workload in the spreadsheets P1 to P12 in document F01_PM_Application.
- the continuing professional development (details in F06) in PM includes the following activities with at least 35 hours per year during the actual validity period of the certificate:
 - Participation in training courses
 - Participation in symposia
 - Own teaching, lecturing or auditing activities
 - Self-study of PM literature
 - Own publications in PM

Evidence must be provided for the details in F06. Evidence of attendance at business events can be provided, for example, by enclosing confirmation of attendance. For self-study of literature by the explanations given in F06. Activities in project management during the current validity period of the certificate are also partly recognized as contributions to further education s. F01_PM_Application. The result of the examination will be communicated to the certificate holder in writing by the office.

If the evaluated evidence of further education is not sufficient for recertification, conditions will be imposed. After a renewed examination and evaluation of the submitted documents, a final decision on recertification will be made.

The obligations are (depending on the deviation from the above-mentioned requirements for continuing education) a literature review specified by PM-ZERT or an interview according to 2.1 „Table 9: Process steps in recertification“ by two assessors.

In the interview there are again two possibilities: Either the assessors come to the conclusion that the certificate holder fulfils the requirements of continuing professional education and recommend recertification or identify shortcomings. In the latter case, they make it an obligation to the certificate holder to participate within one year in a further professional training measure on specified elements from the ICB and to prove this participation within this year. During this period the certificate is suspended.

If the proven practice is not sufficient for recertification, two assessors may invite to an interview according to 2.1 „Table 9: Process steps in recertification“.

If the assessors come to the conclusion that the certificate holder meets the requirements for practical experience, they recommend recertification. Otherwise, recertification is not recommended.

After positive evaluation of the evidence or passed recertification assessment and payment of the corresponding recertification fee, the **certificate will be renewed for another 5 years** and the certification entry on the IPMA website will be updated.

6.1 Interview in the process of recertification

At the beginning of the interview, the certificate holder demonstrates his entitlement to recertification through a maximum 10-minute presentation in which he demonstrates his competence and professional development.

He proves that he has fulfilled the conditions stated to him before the interview by the assessor who evaluated his recertification documents. Verification of compliance with certification requirements

6.2 Verification that certification requirements are met

All certificate holders are subjected to an Intermediate Check at halftime of the validity period of the certificates to check whether the certification requirements are still fulfilled. This includes that the project management activity still meets the requirements of the certified level and that appropriate continuing professional development (at the current "state of the art" in project management) is demonstrated. The PM-ZERT office shall send the evidence of verification in time (F03), completed by the certificate holder and returned to the PM-ZERT office within 2 months.

The information in the certificates is formally and content-wise checked and stored in the certificate file for recertification.

If the certification requirements are no longer met, it will be clarified with the certificate holder how his certification status can be obtained.

7 Appeals and complaints

Applicants, candidates or certificate holders who lodge an appeal may request the revision of a decision made by the certification body with regard to certification status. The only person entitled to lodge an objection is the person concerned.

Applicants, candidates or certificate holders may lodge a complaint in respect of shortcomings in the certification process or inappropriate treatment by the certification body's personnel. The persons undergoing the certification process, their employers and other persons involved in a certification process are entitled to lodge a complaint.

7.1 Appeals

An appeal may be lodged in the following instances:

- a. non-admittance to the certification process
- b. non-admittance to the interview
- c. non-issue of the certificate

Appeals must be submitted in writing to the PM-ZERT office within **4 weeks**. The office shall arrange for an unbiased processing of the appeal and inform the sender of the status of the processing within **6 weeks**. The sender will be informed in writing of the final decision and the reasons for it.

7.2 Complaints

Complaints must be submitted in writing to the PM-ZERT office within **6 weeks**. The office shall inform the complainant of the result in writing within **6 weeks**.

8 General information for candidates

To ensure the prompt and efficient processing of your certification, please observe the following:

1. Read the **pre-requisites and requirements** specified in the respective guidelines for each certification process carefully and consider whether you satisfy them all in full. If anything is unclear or you have doubts, it is best to contact the PM-ZERT office before you commence the application process.
2. Upload a **complete set of application documents via Moodle** to PM-ZERT. If certificates are attached, uncertified copies will suffice.
3. The published **deadlines** or the deadlines agreed with the certificate holder must be adhered to in order to avoid avoidable delays. This applies in particular to the **reports** for which the assessors need sufficient time for a detailed assessment. This leaves enough time afterwards to carry out any rework in good time and to submit these again (with a reasonable interval for the assessors) before the examination; otherwise the examination date is at risk! A **rather early submission** is in the own interest of the certificate holder.
4. The **dates of the events** (written examination, workshop and interview) should be reserved and recorded in good time in the personal appointment calendar. If a planned date cannot be met, this usually means a postponement to the following date and a delay of three months in the issue of the certificate.

9 Data protection and confidentiality

1. The certification body of GPM Deutsche Gesellschaft für Projektmanagement e.V. „PM-ZERT“ undertakes not to pass on or publish company data and personal data as well as the contents of project lists and reports made available to it in connection with the certification procedures to third parties.
2. The data and content will only be communicated to PM-ZERT function owners, in particular the assessors, for use within the scope of their functions. PM-ZERT is exempted from this undertaking if a certification candidate explicitly consents to their publication or dissemination.
3. Should PM-ZERT have to process personal data within the framework of the provision of services, PM-ZERT shall protect the interests of data protection within the framework of the statutory and operational regulations and shall take measures to ensure data security.

10 Use of the PM-ZERT logo

1. The PM-ZERT logo is legally protected and may not be used by unauthorised persons in printed or electronic media.
2. Admittance and examination documents which are not PM-ZERT forms and are used by the candidate in the certification process may not bear the PM-ZERT logo.

11 Appendix

The following chapters contain information that lies outside the certification process. In order to successfully complete the certification process, it is therefore not necessary to know them.

11.1 The domains and profile

The ICB4 distinguishes three types of domain in which persons are certified:

		Domain		
		Project	Programme	Portfolio
Level	A	Certified Project Director	Certified Programme Director	Certified Portfolio Director
	B	Certified Senior Project Manager	Certified Senior Programme Manager	Certified Senior Portfolio Manager
	C	Certified Project Manager		
	D	Certified Project Management Associate		

Table 10: IPMA 4-L-C-Profile

11.2 Self-assessment

A self-assessment (see application F01) is helpful in considering the right level at which certification is sought:

Competence Element		Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation	
Perspective	<i>Strategy</i>							
	<i>Governance, structures and processes</i>							
	<i>Compliance, standards and regulations</i>							
	<i>Power and interest</i>							
	<i>Culture and values</i>							
People	<i>Self-reflection and self-management</i>							
	<i>Personal integrity and reliability</i>							
	<i>Personal communication</i>							
	<i>Relations and engagement</i>							
	<i>Leadership</i>							
	<i>Teamwork</i>							
	<i>Conflict and crisis</i>							
	<i>Resourcefulness</i>							
	<i>Negotiation</i>							
	<i>Results orientation</i>							
	Practice	<i>Project design</i>						
		<i>Requirements and objectives</i>						
		<i>Scope</i>						
<i>Time</i>								
<i>Organisation and information</i>								
<i>Quality</i>								
<i>Finance</i>								
<i>Resources</i>								
<i>Procurement</i>								
<i>Plan and control</i>								
<i>Risk and opportunity</i>								
<i>Stakeholders</i>								
<i>Change and transformation</i>								

Table 11: IPMA Competence Table

The self-assessment motivates at the same time to deal with the CE and KCI of the taxonomy and the Bloom levels (the 6 columns on the right in the table above). Filling in the table is therefore a good preparation for certification.

11.3 The Bloom stages related to the KCI of ICB4

It is well known that the requirements of a CE are fulfilled if the requirements of at least 50% of its KCI are fulfilled. The following table shows the Bloom stages at CE and KCI level.

ICB_ID	Type	Theme	D	C	B	A
04.03.01.	CE	Strategy	1	3	4	6
04.03.01.01.	KCI	Align with organisational mission and vision	1	2	4	6
04.03.01.02.	KCI	Identify and exploit opportunities to influence organisational strategy	0	3	4	6
04.03.01.03.	KCI	Develop and ensure the ongoing validity of the business / organisational justification	1	3	4	6
04.03.01.04.	KCI	Determine, assess and review critical success factors	1	3	4	6
04.03.01.05.	KCI	Determine, assess and review key performance indicators	0	3	4	6
04.03.02.	CE	Governance, structures and processes	2	3	4	6
04.03.02.01.	KCI	Know the principles of project management and the way they are implemented	2	3	4	6
04.03.02.02.	KCI	Know and apply the principles of programme management and the way they are implemented	0	2	2	2
04.03.02.03.	KCI	Know and apply the principles of portfolio management and the way they are implemented	1	2	2	2
04.03.02.04.	KCI	Align the project with the project supporting functions	1	3	4	6
04.03.02.05.	KCI	Align the project with the organisation's decision-making and reporting structures and quality requirements	1	3	4	6
04.03.02.06.	KCI	Align the project with human resource processes and functions	0	2	4	4
04.03.02.07.	KCI	Align the project with finance and control processes and functions	1	3	4	6
04.03.03.	CE	Compliance, standards and regulations	2	2	4	4
04.03.03.01.	KCI	Identify and ensure that the project complies with all relevant legislation	2	2	4	4
04.03.03.02.	KCI	Identify and ensure that the project complies with all relevant health, safety, security and environmental regulations (HSSE)	2	2	4	4

ICB_ID	Type	Theme	D	C	B	A
04.03.03.03.	KCI	Identify and ensure that the project complies with all relevant codes of conduct and professional regulation	2	2	4	4
04.03.03.04.	KCI	Identify and ensure that the project complies with relevant sustainability principles and objectives	1	2	4	4
04.03.03.05.	KCI	Assess, use and develop professional standards and tools for the project	2	2	2	2
04.03.03.06.	KCI	Assess, benchmark and improve the organisational project management competence	0	2	4	4
04.03.04.	CE	Power and interest	2	3	5	6
04.03.04.01.	KCI	Assess the personal ambitions and interests of others and the potential impact of these on the project	2	3	5	6
04.03.04.02.	KCI	Assess the informal influence of individuals and groups and its potential impact on the project	2	3	5	6
04.03.04.03.	KCI	Assess the personalities and working styles of others and employ them to the benefit of the project	0	3	4	6
04.03.05.	CE	Culture and values	2	3	4	6
04.03.05.01.	KCI	Assess the culture and values of the society and their implications for the project	0	3	4	6
04.03.05.02.	KCI	Align the project with the formal culture and corporate values of the organisation	2	2	3	4
04.03.05.03.	KCI	Assess the informal culture and values of the organisation and their implications for the project	0	2	4	4
04.04.01.	CE	Self-reflection and self-management	3	3	4	6
04.04.01.01.	KCI	Identify and reflect on the ways in which own values and experiences affect the work	2	3	4	6
04.04.01.02.	KCI	Build self-confidence on the basis of personal strengths and weaknesses	0	1	3	3
04.04.01.03.	KCI	Identify, and reflect on, personal motivations to set personal goals and keep focus	2	3	4	4
04.04.01.04.	KCI	Organise personal work depending on the situation and own resources	3	3	4	4
04.04.01.05.	KCI	Take responsibility for personal learning and development	2	3	4	6

ICB_ID	Type	Theme	D	C	B	A
04.04.02.	CE	Personal integrity and reliability	2	3	4	6
04.04.02.01.	KCI	Acknowledge and apply ethical values to all decisions and actions	0	2	2	2
04.04.02.02.	KCI	Promote the sustainability of outputs and outcomes	0	2	2	2
04.04.02.03.	KCI	Take responsibility for own decisions and actions	1	3	4	4
04.04.02.04.	KCI	Act, take decisions and communicate in a consistent way	0	3	4	4
04.04.02.05.	KCI	Complete tasks thoroughly in order to build confidence with others	2	3	4	6
04.04.03.	CE	Personal communication	3	4	6	6
04.04.03.01.	KCI	Provide clear and structured information to others and verify their understanding	3	4	5	6
04.04.03.02.	KCI	Facilitate and promote open communication	2	3	5	6
04.04.03.03.	KCI	Choose communication styles and channels to meet the needs of the audience, situation and management level	2	4	5	6
04.04.03.04.	KCI	Communicate effectively with virtual teams	2	3	6	6
04.04.03.05.	KCI	Employ humour and sense of perspective when appropriate	0	3	4	4
04.04.04.	CE	Relations and engagement	2	3	4	5
04.04.04.01.	KCI	Initiate and develop personal and professional relationships	2	3	4	4
04.04.04.02.	KCI	Build, facilitate and contribute to social networks	0	2	2	2
04.04.04.03.	KCI	Demonstrate empathy through listening, understanding and support	2	3	4	4
04.04.04.04.	KCI	Show confidence and respect by encouraging others to share their opinions or concerns	0	3	4	4
04.04.04.05.	KCI	Share own vision and goals in order to gain the engagement and commitment of others	0	3	4	4
04.04.05.	CE	Leadership	2	3	5	6
04.04.05.01.	KCI	Initiate actions and proactively offer help and advice	0	3	3	3
04.04.05.02.	KCI	Take ownership and show commitment	0	3	5	6
04.04.05.03.	KCI	Provide direction, coaching and mentoring to guide and improve the work of individuals and teams	2	3	5	5

ICB_ID	Type	Theme	D	C	B	A
04.04.05.04.	KCI	Exert appropriate power and influence over others to achieve the goals	0	3	5	6
04.04.05.05.	KCI	Make, enforce and review decisions	0	3	5	6
04.04.06.	CE	Teamwork	2	3	5	6
04.04.06.01.	KCI	Select and build the team	2	3	4	4
04.04.06.02.	KCI	Promote cooperation and networking between team members	2	3	4	4
04.04.06.03.	KCI	Support, facilitate and review the development of the team and its members	2	3	4	4
04.04.06.04.	KCI	Empower teams by delegating tasks and responsibilities	0	3	5	6
04.04.06.05.	KCI	Recognise errors to facilitate learning from mistakes	2	3	4	6
04.04.07.	CE	Conflict and crisis	2	3	5	6
04.04.07.01.	KCI	Anticipate and possibly prevent conflicts and crises	1	3	5	6
04.04.07.02.	KCI	Analyse the causes and consequences of conflicts and crises and select appropriate response(s)	2	3	5	6
04.04.07.03.	KCI	Mediate and resolve conflicts and crises and/or their impact	0	3	5	6
04.04.07.04.	KCI	Identify and share learning from conflicts and crises in order to improve future practice	2	3	4	6
04.04.08.	CE	Resourcefulness	2	3	5	6
04.04.08.01.	KCI	Stimulate and support an open and creative environment	2	3	4	4
04.04.08.02.	KCI	Apply conceptual thinking to define situations and strategies	2	3	5	5
04.04.08.03.	KCI	Apply analytic techniques to analysing situations, financial and organisational data and trends	2	3	5	6
04.04.08.04.	KCI	Promote and apply creative techniques to find alternatives and solutions	2	3	3	3
04.04.08.05.	KCI	Promote a holistic view of the project and its context to improve decision-making	0	3	3	3
04.04.09.	CE	Negotiation	2	3	4	6
04.04.09.01.	KCI	Identify and analyse the interests of all parties involved in the negotiation	2	3	4	4
04.04.09.02.	KCI	Develop and evaluate options and alternatives with the potential to meet the needs of all parties	0	2	3	4

ICB_ID	Type	Theme	D	C	B	A
04.04.09.03.	KCI	Define a negotiation strategy in line with own objectives that is acceptable to all parties involved	0	2	3	6
04.04.09.04.	KCI	Reach negotiated agreements with other parties that are in line with own objectives	0	2	3	6
04.04.09.05.	KCI	Detect and exploit additional selling and acquisition possibilities	0	3	4	5
04.04.10.	CE	Results orientation	2	3	6	6
04.04.10.01.	KCI	Evaluate all decisions and actions against their impact on project success and the objectives of the organisation	1	3	4	5
04.04.10.02.	KCI	Balance needs and means to optimise outcomes and success	1	3	6	6
04.04.10.03.	KCI	Create and maintain a healthy, safe and productive working environment	0	3	4	6
04.04.10.04.	KCI	Promote and 'sell' the project, its processes and outcomes	2	3	6	6
04.04.10.05.	KCI	Deliver results and get acceptance	1	3	4	6
04.05.01.	CE	Project design	2	3	5	6
04.05.01.01.	KCI	Acknowledge, prioritise and review success criteria	2	3	4	5
04.05.01.02.	KCI	Review, apply and exchange lessons learned from and with other projects	1	3	4	6
04.05.01.03.	KCI	Determine complexity and its consequences for the approach	2	3	5	6
04.05.01.04.	KCI	Select and review the overall project management approach	2	3	4	6
04.05.01.05.	KCI	Design the project execution architecture	2	3	3	3
04.05.02.	CE	Requirements and objectives	3	4	5	6
04.05.02.01.	KCI	Define and develop the project goal hierarchy	3	3	5	6
04.05.02.02.	KCI	Identify and analyse the project stakeholder needs and requirements	3	4	4	6
04.05.02.03.	KCI	Prioritise and decide on requirements and acceptance criteria	3	4	5	6
04.05.03.	CE	Scope	3	3	5	6
04.05.03.01.	KCI	Define the project deliverables	2	3	5	6
04.05.03.02.	KCI	Structure the project scope	3	3	5	5
04.05.03.03.	KCI	Define the work packages of the project	3	3	4	5
04.05.03.04.	KCI	Establish and maintain scope configuration	1	3	4	4
04.05.04.	CE	Time	3	4	5	6

ICB_ID	Type	Theme	D	C	B	A
04.05.04.01.	KCI	Define / Establish the activities required to deliver the project	3	4	4	2
04.05.04.02.	KCI	Determine the work effort and duration of activities	3	3	4	2
04.05.04.03.	KCI	Decide on schedule and stage approach	3	3	5	5
04.05.04.04.	KCI	Sequence project activities and create a schedule	3	4	4	6
04.05.04.05.	KCI	Monitor progress against the schedule and make any necessary adjustments	2	4	4	6
04.05.05.	CE	Organisation and information	3	3	6	6
04.05.05.01.	KCI	Assess and determine the needs of stakeholders relating to information and documentation	3	3	6	6
04.05.05.02.	KCI	Define the structure, roles and responsibilities within the project	2	3	4	6
04.05.05.03.	KCI	Establish infrastructure, processes and systems for information flow	2	3	4	5
04.05.05.04.	KCI	Implement, monitor and maintain the organisation of the project	2	3	6	6
04.05.06.	CE	Quality	1	3	5	5
04.05.06.01.	KCI	Develop, monitor the implementation of, and revise a quality management plan for the project	1	3	5	5
04.05.06.02.	KCI	Review the project and its deliverables to ensure that they continue to meet the requirements of the quality management plan	0	3	4	5
04.05.06.03.	KCI	Verify the achievement of project quality objectives and recommend any necessary corrective and/or preventive actions	1	3	5	5
04.05.06.04.	KCI	Plan and organise the validation of project outcomes	1	3	5	5
04.05.06.05.	KCI	Ensure quality throughout the project	0	2	3	3
04.05.07.	CE	Finance	2	3	5	6
04.05.07.01.	KCI	Estimate project costs	2	3	5	6
04.05.07.02.	KCI	Establish the project budget	0	2	5	6
04.05.07.03.	KCI	Secure project funding	0	1	3	4
04.05.07.04.	KCI	Develop, establish and maintain a financial management and reporting system for the project	1	3	4	5
04.05.07.05.	KCI	Monitor project financials in order to identify and correct deviations from the project plan	0	3	4	5
04.05.08.	CE	Resources	2	4	5	6

ICB_ID	Type	Theme	D	C	B	A
04.05.08.01.	KCI	Develop strategic resource plan to deliver the project	1	3	4	5
04.05.08.02.	KCI	Define the quality and quantity of resources required	1	3	5	6
04.05.08.03.	KCI	Identify the potential sources of resources and negotiate their acquisition	0	3	5	5
04.05.08.04.	KCI	Allocate and distribute resources according to defined need	2	4	5	6
04.05.08.05.	KCI	Evaluate resource usage and take any necessary corrective actions	0	3	5	6
04.05.09.	CE	Procurement	1	3	6	6
04.05.09.01.	KCI	Agree on procurement needs, options and processes	1	3	4	6
04.05.09.02.	KCI	Contribute to the evaluation and selection of suppliers and partners	0	3	3	3
04.05.09.03.	KCI	Contribute to the negotiation and agreement of contractual terms and conditions that meet project objectives	1	3	6	6
04.05.09.04.	KCI	Supervise the execution of contracts, address issues and seek redress where necessary	1	3	4	5
04.05.10.	CE	Plan and control	2	4	6	6
04.05.10.01.	KCI	Start the project and develop and get agreement on the project management plan	2	3	5	5
04.05.10.02.	KCI	Initiate and manage the transition to a new project phase	1	3	5	5
04.05.10.03.	KCI	Control project performance against the project plan and take any necessary remedial actions	2	4	5	6
04.05.10.04.	KCI	Report on project progress	2	3	4	5
04.05.10.05.	KCI	Assess, get agreement on, and implement project changes	2	3	4	5
04.05.10.06.	KCI	Close and evaluate a phase or the project	2	3	6	6
04.05.11.	CE	Risk and opportunity	3	3	4	6
04.05.11.01.	KCI	Develop and implement a risk management framework	3	3	4	6
04.05.11.02.	KCI	Identify risks and opportunities	2	3	4	5
04.05.11.03.	KCI	Assess the probability and impact of risks and opportunities	3	3	4	5
04.05.11.04.	KCI	Select strategies and implement response plan to address risks and opportunities	3	3	4	6
04.05.11.05.	KCI	Evaluate and monitor risks, opportunities and implemented responses	0	3	4	5
04.05.12.	CE	Stakeholders	3	3	4	6

ICB_ID	Type	Theme	D	C	B	A
04.05.12.01.	KCI	Identify stakeholders and analyse their interests and influence	3	3	4	5
04.05.12.02.	KCI	Develop and maintain a stakeholder strategy and communication plan	2	3	4	5
04.05.12.03.	KCI	Engage with the executive, sponsors and higher management to gain commitment and to manage interests and expectations	2	3	4	5
04.05.12.04.	KCI	Engage with users, partners, suppliers and other stakeholders to gain their cooperation and commitment	2	3	4	6
04.05.12.05.	KCI	Organise and maintain networks and alliances	0	2	3	6
04.05.13.	CE	Change and transformation	1	3	4	5
04.05.13.01.	KCI	Assess the adaptability to change of the organisation(s)	0	3	4	4
04.05.13.02.	KCI	Identify change requirements and transformation opportunities	0	2	4	4
04.05.13.03.	KCI	Develop change or transformation strategy	0	2	4	5
04.05.13.04.	KCI	Implement change or transformation management strategy	1	3	4	5

Table 12: Bloom stages related to CE and KCI

11.4 Comparison of the ICB3 elements with the CE and KCI of the ICB4

A comparison of the ICB3 elements with the CE of the ICB4 shows which correspondences there were in the „old“ set of rules and where these are mapped in the new one. The following overview can also be found in „Individual Competence Baseline“, published by IPMA.

Element	IPMA ICB Version 3.0 competence elements	CE, KCI	IPMA ICB Version 4.0
1.01.	Project management success	4.5.1.	Project Design
		4.3.1.4.	Determine, assess and review critical success factors
		4.4.10.1.	Evaluate all decisions and actions against their impact on project success and the objectives of the organisation
		4.4.10.5.	Deliver results and get acceptance
1.02.	Interested parties	4.5.12.	Stakeholders
		4.3.4.	Power and interest
1.03.	Project requirements and objectives	4.5.2.	Requirements and objectives
1.04.	Risk and opportunity	4.5.11.	Risk and opportunity
1.05.	Quality	4.5.6.	Quality
1.06.	Project organisation	4.5.5.2.	Define the structure, roles and responsibilities within the project
		4.5.5.4.	Implement, monitor and maintain the organisation of the project
1.07.	Teamwork	4.4.6.	Teamwork
1.08.	Problem resolution	4.4.8.	Resourcefulness
		4.4.8.2.	Apply conceptual thinking to define situations and strategies
		4.4.8.3.	Apply analytic techniques to analysing situations, financial and organisational data and trends
		4.4.8.4.	Promote and apply creative techniques to find alternatives and solutions
		4.4.8.5.	Promote a holistic view of the project and its context to improve decision-making
1.09.	Project structures	4.5.3.2	Structure the project scope
		4.5.3.3.	Define the work packages of the project
1.10.	Scope and deliverables	4.5.3.1.	Define the project deliverables
		4.5.3.4.	Establish and maintain scope configuration
1.11.	Time and project phases	4.5.4.	Time
1.12.	Resources	4.5.8.	Resources and partnerships
1.13.	Cost and Finance	4.5.7.	Finance
1.14.	Procurement and contract	4.5.9.	Procurement
1.15.	Changes	4.5.10.5.	Assess, get agreement on, and implement project changes
1.16.	Control and reports	4.5.10.3.	Control project performance against the project plan and take any necessary remedial actions
		4.5.10.4.	Report on project progress

Element	IPMA ICB Version 3.0 competence elements	CE, KCI	IPMA ICB Version 4.0
1.17.	Information and documentation	4.5.5.1.	Assess and determine the needs of stakeholders relating to information and documentation
		4.5.5.3.	Establish infrastructure, processes and systems for information flow
1.18.	Communication	4.4.3.	Personal communication
1.19.	Start-up	4.5.10.1.	Start the project and develop and get agreement on the project
		4.5.10.2.	Initiate and manage the transition to a new project phase
1.20.	Close-out	4.5.10.6.	Close and evaluate a phase or the project
2.01.	Leadership	4.4.5.	Leadership
2.02.	Engagement and motivation	4.4.4.	Relationships and engagement
		4.4.5.2.	Take ownership and show commitment
		4.4.4.5.	Share own vision and goals in order to gain the engagement and commitment of others
		4.4.6.4.	Empower people by delegating tasks and responsibilities to teams
		4.4.1.3.	Identify, and reflect on, personal motivations to set personal goals and keep focus
2.03.	Self-control	4.4.1.	Self-reflection and self-management
		4.4.2.3.	Take responsibility for own decisions and actions
2.04.	Assertiveness	4.4.5.3.	Provide direction, coaching and mentoring to guide and improve the work of individuals and teams
		4.4.5.4.	Exert appropriate power and influence over others to achieve the goals
2.05.	Relaxation	4.4.1.4.	Organise personal work depending on the situation and own resources
		4.4.3.5.	Employ humour and sense of perspective when appropriate
		4.4.10.3	Create and maintain a healthy, safe and productive working environment
2.06.	Openness	4.4.8.1.	Stimulate and support an open and creative environment
		4.4.3.2.	Facilitate and promote open communication
2.07.	Creativity	4.4.8.1.	Stimulate and support an open and creative environment
		4.4.8.4.	Promote and apply creative techniques to find alternatives and solutions
2.08.	Results orientation	4.4.10.	Results orientation
2.09.	Efficiency	4.4.10.2.	Balance needs and means to optimise outcomes and success
2.10.	Consultation	4.4.4.4.	Show confidence and respect by encouraging others to share their opinions
		4.4.4.5.	Share own vision and goals in order to gain the engagement and commitment of others
2.11.	Negotiation	4.4.9.	Negotiation
2.12.	Conflict and crisis	4.4.7.	Conflict and crisis

Element	IPMA ICB Version 3.0 competence elements	CE, KCI	IPMA ICB Version 4.0
2.13.	Reliability	4.4.2.4.	Act, take decisions and communicate in a consistent way
		4.4.2.5.	Complete tasks thoroughly in order to build confidence with others
2.14.	Values appreciation	4.4.4.4.	Show confidence and respect by encouraging others to share their opinions or concerns
		4.3.5.	Culture and values
2.15.	Ethics	4.4.2.1.	Acknowledge and apply ethical values to all your decisions and actions
		4.3.3.3.	Identify and ensure that the project complies with all relevant codes of conduct and professional regulation
		4.4.2.2.	Promote the sustainability of outputs and outcomes
		4.3.3.4.	Identify and ensure that the portfolio complies with, relevant sustainability principles and objectives
3.01.	Project orientation	4.3.2.1.	Know the principles of project management and the way they are implemented
3.02.	Programme orientation	4.3.2.2.	Know and apply the principles of programme management and the way they are implemented
3.03.	Portfolio orientation	4.3.2.3.	Know and apply the principles of portfolio management and the way they are implemented
3.04.	Project, programme and portfolio implementation	4.3.3.6.	Assess, benchmark and improve the organisational project management competence
3.05.	Permanent organisation	4.3.2.	Governance, structures and processes
3.06.	Business	4.3.1.	Strategy
		4.3.2.5.	Align the project with the organisation's decision-making and reporting structures and quality requirements
		4.3.4.	Power and interest
3.07.	Systems, products and technology	4.3.2.	Governance, structures and processes
		4.3.3.3.	Identify and ensure that the project complies with, all relevant codes of conduct and professional regulation
		4.3.3.5.	Assess, use and develop professional standards and tools for the project
		4.3.1.5.	Determine, assess and review key performance indicators
3.08.	Personnel management	4.3.2.6.	Align the project with human resource processes and functions
3.09.	Health, safety, security and environment	4.3.3.2.	Identify and ensure that the project complies with, all relevant health, safety, security and environmental regulations (HSSE)
		4.3.3.4.	Identify and ensure that the portfolio complies with, relevant sustainability principles and objectives

Element	IPMA ICB Version 3.0 competence elements	CE, KCI	IPMA ICB Version 4.0
3.10.	Finance	4.3.2.7.	Align the project with inance and control processes and functions
3.11.	Legal	4.3.3.1.	Identify and ensure that the project complies with, all relevant legislation

Table 13: Cross-Reference ICB3/ICB4

11.5 Comparison of CE and KCI of ICB4 with ICB3 elements

A comparison of CE and KCI of the ICB4 with the elements of the ICB3 shows in particular the "measurands" which have been newly added.

CE, KCI	IPMA ICB Version 4.0	Element	IPMA ICB Version 3.0 competence elements
4.3.1.	Strategy	3.06.	Business
4.3.1.1.	Align with organisational mission and vision		
4.3.1.2.	Identify and exploit opportunities to influence organisational strategy		
4.3.1.3.	Develop and ensure the ongoing validity of the business / organisational justification		
4.3.1.4.	Determine, assess and review critical success factors	1.01.	Project management success
4.3.1.5.	Determine, assess and review key performance indicators	3.07.	Systems, products and technology
4.3.2.	Governance, structures and processes	3.05.	Permanent organisation
		3.07.	Systems, products and technology
4.3.2.1.	Know the principles of project management and the way they are implemented	3.01.	Project orientation
4.3.2.2.	Know and apply the principles of programme management and the way they are implemented	3.02.	Programme orientation
4.3.2.3.	Know and apply the principles of portfolio management and the way they are implemented	3.03.	Portfolio orientation
4.3.2.4.	Align the project with the project supporting functions		
4.3.2.5.	Align the project with the organisation's decision-making and reporting structures and quality requirements	3.06.	Business
4.3.2.6.	Align the project with human resource processes and functions	3.08.	Personnel management
4.3.2.7.	Align the project with finance and control processes and functions	3.10.	Finance

CE, KCI	IPMA ICB Version 4.0	Element	IPMA ICB Version 3.0 competence elements
4.3.3.	Compliance, standards and regulations		
4.3.3.1.	Identify and ensure that the project complies with all relevant legislation	3.11.	Legal
4.3.3.2.	Identify and ensure that the project complies with all relevant health, safety, security and environmental regulations (HSSE)	3.09.	Health, safety, security and environment
4.3.3.3.	Identify and ensure that the project complies with all relevant codes of conduct and professional regulation		
4.3.3.4.	Identify and ensure that the project complies with relevant sustainability principles and objectives		
4.3.3.5.	Assess, use and develop professional standards and tools for the project		
4.3.3.6.	Assess, benchmark and improve the organisational project management competence		
4.3.4.	Power and interest	3.06.	Business
4.3.4.1.	Assess the personal ambitions and interests of others and the potential impact of these on the project		
4.3.4.2.	Assess the informal influence of individuals and groups and its potential impact on the project		
4.3.4.3.	Assess the personalities and working styles of others and employ them to the benefit of the project		
4.3.5.	Culture and values	2.14.	Values appreciation
4.3.5.1.	Assess the culture and values of the society and their implications for the project		
4.3.5.2.	Align the project with the formal culture and corporate values of the organisation		
4.3.5.3.	Assess the informal culture and values of the organisation and their implications for the project		
4.4.1.	Self-reflection and self-management	2.03.	Self-control
4.4.1.1.	Identify and reflect on the ways in which own values and experiences affect the work		
4.4.1.2.	Build self-confidence on the basis of personal strengths and weaknesses		
4.4.1.3.	Identify, and reflect on, personal motivations to set personal goals and keep focus	2.02.	Engagement and motivation

CE, KCI	IPMA ICB Version 4.0	Element	IPMA ICB Version 3.0 competence elements
4.4.1.4.	Organise personal work depending on the situation and own resources	2.05.	Relaxation
4.4.1.5.	Take responsibility for personal learning and development		
4.4.2.	Personal integrity and reliability		
4.4.2.1.	Acknowledge and apply ethical values to all decisions and actions	2.15.	Ethics
4.4.2.2.	Promote the sustainability of outputs and outcomes	2.15.	Ethics
4.4.2.3.	Take responsibility for own decisions and actions	2.03.	Self-control
4.4.2.4.	Act, take decisions and communicate in a consistent way	2.13.	Reliability
4.4.2.5.	Complete tasks thoroughly in order to build confidence with others	2.13.	Reliability
4.4.3.	Personal communication	1.18.	Communication
4.4.3.1.	Provide clear and structured information to others and verify their understanding		
4.4.3.2.	Facilitate and promote open communication	2.06.	Openness
4.4.3.3.	Choose communication styles and channels to meet the needs of the audience, situation and management level		
4.4.3.4.	Communicate effectively with virtual teams		
4.4.3.5.	Employ humour and sense of perspective when appropriate	2.05.	Relaxation
4.4.4.	Relations and engagement	2.02.	Engagement and motivation
4.4.4.1.	Initiate and develop personal and professional relationships		
4.4.4.2.	Build, facilitate and contribute to social networks		
4.4.4.3.	Demonstrate empathy through listening, understanding and support		
4.4.4.4.	Show confidence and respect by encouraging others to share their opinions or concerns	2.10.	Consultation
		2.14.	Values appreciation
4.4.4.5.	Share own vision and goals in order to gain the engagement and commitment of others	2.02.	Engagement and motivation
		2.10.	Consultation
4.4.5.	Leadership	2.01.	Leadership
4.4.5.1.	Initiate actions and proactively offer help and advice		
4.4.5.2.	Take ownership and show commitment	2.02.	Engagement and motivation

CE, KCI	IPMA ICB Version 4.0	Element	IPMA ICB Version 3.0 competence elements
4.4.5.3.	Provide direction, coaching and mentoring to guide and improve the work of individuals and teams	2.04.	Assertiveness
4.4.5.4.	Exert appropriate power and influence over others to achieve the goals	2.04.	Assertiveness
4.4.5.5.	Make, enforce and review decisions		
4.4.6.	Teamwork	1.07.	Teamwork
4.4.6.1.	Select and build the team		
4.4.6.2.	Promote cooperation and networking between team members		
4.4.6.3.	Support, facilitate and review the development of the team and its members		
4.4.6.4.	Empower teams by delegating tasks and responsibilities	2.02.	Engagement and motivation
4.4.6.5.	Recognise errors to facilitate learning from mistakes		
4.4.7.	Conflict and crisis	2.12.	Conflict and crisis
4.4.7.1.	Anticipate and possibly prevent conflicts and crises		
4.4.7.2.	Analyse the causes and consequences of conflicts and crises and select appropriate response(s)		
4.4.7.3.	Mediate and resolve conflicts and crises and/or their impact		
4.4.7.4.	Identify and share learning from conflicts and crises in order to improve future practice		
4.4.8.	Resourcefulness	1.08.	Problem resolution
4.4.8.1.	Stimulate and support an open and creative environment	2.06.	Openness
		2.07.	Creativity
4.4.8.2.	Apply conceptual thinking to define situations and strategies	1.08.	Problem resolution
4.4.8.3.	Apply analytic techniques to analysing situations, financial and organisational data and trends	1.08.	Problem resolution
4.4.8.4.	Promote and apply creative techniques to find alternatives and solutions	1.08.	Problem resolution
		2.07.	Creativity
4.4.8.5.	Promote a holistic view of the project and its context to improve decision-making	1.08.	Problem resolution
4.4.9.	Negotiation	2.11.	Negotiation
4.4.9.1.	Identify and analyse the interests of all parties involved in the negotiation		

CE, KCI	IPMA ICB Version 4.0	Element	IPMA ICB Version 3.0 competence elements
4.4.9.2.	Develop and evaluate options and alternatives with the potential to meet the needs of all parties		
4.4.9.3.	Define a negotiation strategy in line with own objectives that is acceptable to all parties involved		
4.4.9.4.	Reach negotiated agreements with other parties that are in line with own objectives		
4.4.9.5	Detect and exploit additional selling and acquisition possibilities		
4.4.10.	Results orientation	2.08.	Results orientation
4.4.10.1.	Evaluate all decisions and actions against their impact on project success and the objectives of the organisation	1.01.	Project management success
4.4.10.2.	Balance needs and means to optimise outcomes and success	2.09.	Efficiency
4.4.10.3	Create and maintain a healthy, safe and productive working environment	2.05.	Relaxation
4.4.10.4	Promote and 'sell' the project, its processes and outcomes		
4.4.10.5.	Deliver results and get acceptance	1.01.	Project management success
4.5.1.	Project design	1.01.	Project management success
4.5.1.1.	Acknowledge, prioritise and review success criteria		
4.5.1.2.	Review, apply and exchange lessons learned from and with other projects		
4.5.1.3.	Determine complexity and its consequences for the approach		
4.5.1.4.	Select and review the overall project management approach		
4.5.1.5.	Design the project execution architecture		
4.5.2.	Requirements and objectives	1.03.	Project requirements and objectives
4.5.2.1.	Define and develop the project goal hierarchy		
4.5.2.2.	Identify and analyse the project stakeholder needs and requirements		
4.5.2.3.	Prioritise and decide on requirements and acceptance criteria		
4.5.3.	Scope		
4.5.3.1.	Define the project deliverables	1.10.	Scope and deliverables
4.5.3.2	Structure the project scope	1.09.	Project structures
4.5.3.3.	Define the work packages of the project	1.09.	Project structures

CE, KCI	IPMA ICB Version 4.0	Element	IPMA ICB Version 3.0 competence elements
4.5.3.4.	Establish and maintain scope configuration	1.10.	Scope and deliverables
4.5.4.	Time	1.11.	Time and project phases
4.5.4.1.	Define / Establish the activities required to deliver the project		
4.5.4.2.	Determine the work effort and duration of activities		
4.5.4.3.	Decide on schedule and stage approach		
4.5.4.4.	Sequence project activities and create a schedule		
4.5.4.5.	Monitor progress against the schedule and make any necessary adjustments		
4.5.5.	Organisation and information		
4.5.5.1.	Assess and determine the needs of stakeholders relating to information and documentation	1.17.	Information and documentation
4.5.5.2.	Define the structure, roles and responsibilities within the project	1.06.	Project organisation
4.5.5.3.	Establish infrastructure, processes and systems for information flow	1.17.	Information and documentation
4.5.5.4.	Implement, monitor and maintain the organisation of the project	1.06.	Project organisation
4.5.6.	Quality	1.05.	Quality
4.5.6.1.	Develop, monitor the implementation of, and revise a quality management plan for the project		
4.5.6.2.	Review the project and its deliverables to ensure that they continue to meet the requirements of the quality management plan		
4.5.6.3.	Verify the achievement of project quality objectives and recommend any necessary corrective and/or preventive actions		
4.5.6.4.	Plan and organise the validation of project outcomes		
4.5.6.5.	Ensure quality throughout the project		
4.5.7.	Finance	1.13.	Cost and inance
4.5.7.1.	Estimate project costs		
4.5.7.2.	Establish the project budget		
4.5.7.3.	Secure project funding		
4.5.7.4.	Develop, establish and maintain a financial management and reporting system for the project		
4.5.7.5.	Monitor project financials in order to identify and correct deviations from the project plan		

CE, KCI	IPMA ICB Version 4.0	Element	IPMA ICB Version 3.0 competence elements
4.5.8.	Resources	1.12.	Resources
4.5.8.1.	Develop strategic resource plan to deliver the project		
4.5.8.2.	Define the quality and quantity of resources required		
4.5.8.3.	Identify the potential sources of resources and negotiate their acquisition		
4.5.8.4.	Allocate and distribute resources according to defined need		
4.5.8.5.	Evaluate resource usage and take any necessary corrective actions		
4.5.9.	Procurement	1.14.	Procurement and contract
4.5.9.1.	Agree on procurement needs, options and processes		
4.5.9.2.	Contribute to the evaluation and selection of suppliers and partners		
4.5.9.3.	Contribute to the negotiation and agreement of contractual terms and conditions that meet project objectives		
4.5.9.4.	Supervise the execution of contracts, address issues and seek redress where necessary		
4.5.10.	Plan and control		
4.5.10.1.	Start the project and develop and get agreement on the project management plan	1.19.	Start-up
4.5.10.2.	Initiate and manage the transition to a new project phase	1.19.	Start-up
4.5.10.3.	Control project performance against the project plan and take any necessary remedial actions	1.16.	Control and reports
4.5.10.4.	Report on project progress	1.16.	Control and reports
4.5.10.5.	Assess, get agreement on, and implement project changes	1.15.	Changes
4.5.10.6.	Close and evaluate a phase or the project	1.20.	Close-out
4.5.11.	Risk and opportunity	1.04.	Risk and opportunity
4.5.11.1.	Develop and implement a risk management framework		
4.5.11.2.	Identify risks and opportunities		
4.5.11.3.	Assess the probability and impact of risks and opportunities		
4.5.11.4.	Select strategies and implement response plan to address risks and opportunities		
4.5.11.5.	Evaluate and monitor risks, opportunities and implemented responses		
4.5.12.	Stakeholders	1.02.	Interested parties

CE, KCI	IPMA ICB Version 4.0	Element	IPMA ICB Version 3.0 competence elements
4.5.12.1.	Identify stakeholders and analyse their interests and influence		
4.5.12.2.	Develop and maintain a stakeholder strategy and communication plan		
4.5.12.3.	Engage with the executive, sponsors and higher management to gain commitment and to manage interests and expectations		
4.5.12.4.	Engage with users, partners, suppliers and other stakeholders to gain their cooperation and commitment		
4.5.12.5.	Organise and maintain networks and alliances		
4.5.13.	Change and transformation		
4.5.13.1.	Assess the adaptability to change of the organisation(s)		
4.5.13.2.	Identify change requirements and transformation opportunities		
4.5.13.3.	Develop change or transformation strategy		
4.5.13.4.	Implement change or transformation management strategy		

Table 14: Cross-Reference ICB4/ICB3

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