

PM-ZERT

Certification body of the GPM

Guideline IPMA® Level B certification

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PM-ZERT ist die
Zertifizierungsstelle der
GPM Deutsche Gesellschaft
für Projektmanagement e. V.



Die GPM ist Mitglied der
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Management Association.



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Applicable documents

The PM-ZERT documents listed in the table below are required either for the preparation for certification or for the application documents to be submitted and are therefore to be understood as applicable documents. Their content also completes the comprehensive information provided in this guideline.

Please familiarize yourself with these documents before submitting your application.

Document		To be completed
No.	Name	Yes/No
	ICB, Individual Competence Baseline	No
	ICR public, IPMA Certification Regulation (public version)	No
	Dates and fees	No
	GPM Code of Ethics	No
Z01	General Guideline Certifications	No
R09-1	Taxonomy – Project Management	No
R09-2	Taxonomy – Programme Management	No
R09-3	Taxonomy – Portfolio Management	No
F01	Certification Record (for initial certification, upgrade certification, and renewal of an existing certificate (re-certification)) with self-assessment	Yes
F01RE	Candidate Legal Declaration	Yes
Report template	Report template (according to the requested level and domain)	Yes

Table 1: Applicable documents

List of abbreviations

Abbreviation	Explanation
ICB	Individual Competence Baseline
ICR (Public)	IPMA International Certification Regulations (Public)
CE	Competence Element
KCI	Key Competence Indicator
ESR	Executive Summary Report
LA	Lead Assessor
CoA	Co-Assessor
PM-ZERT	PM-ZERT is the certification body of the GPM Deutsche Gesellschaft für Projektmanagement e. V.

Table 2: List of abbreviations

Change compared to the previous version

Change	Page/s
Integration ISO 9001 in 17024 – DAkkS – Delete of TÜV Logo	1
Conformity check and process briefing	7
Explanation of the evaluation of exam questions with a classic and agile component	12
Information on “Upgrade Rounds”	13
Various clarifications and formatting	
New PM-ZERT Logo	

Table 3: Change history

Information on "gender-appropriate spelling"

In its publications, GPM attaches significant importance to a differentiated, responsible, non-discriminatory and gender-equitable use of language. Whenever the generic masculine is used, it is intended as a neutral grammatical expression and in no way implies discrimination against the other gender.

1. Validity

This document is valid from 28.02.2025.

In this version, clarifications, spelling and formatting have been made. For this reason, all previous versions are invalid.

2. The certification IPMA® Level B

Application requirements for an IPMA Level B certification

(Original to be found in ICR Public)

	Requirements	Suitability
Level: IPMA Level B Domain: Project management	Admission to the IPMA Level B project management certification requires that the candidate can provide evidence for operating in a complex project environment or being responsible for a complex project.	The candidate must provide evidence of the following for the 8 years prior to application: At least five years' experience as a project manager, including three years in a responsible management role in complex projects.
Level: IPMA Level B Domain: Program management	Admission to the IPMA Level B programme management certification requires that the candidate can provide evidence for acting in a complex programme, or for being responsible for a complex programme.	The candidate must provide evidence of the following for the 8 years prior to application: At least five years' experience as a programme manager, including three years in a responsible management role in complex programmes.
Level: IPMA Level B Domain: Portfolio management	Admission to the IPMA Level B portfolio management certification requires that the candidate can provide evidence for acting in a complex portfolio, or for being responsible for a complex portfolio.	The candidate must provide evidence of the following for the 8 years prior to application: At least five years' experience as a portfolio manager, including three years in a responsible management role in complex portfolios.

Table 4: IPMA Level B admission criteria

The period of eight years can be extended by a further four years with justification if an application for extension is made in the “certification record F01”.

The following parameters are taken into account when assessing the management experience required for IPMA Level B:

- Variety in type and size of projects / programmes / portfolios
- Complexity of projects / programmes / portfolios
- Evidence of the competence elements (CE)
- Role of the candidate in the projects / programmes / portfolios
- Time spent managing projects / programmes / portfolios
- Number of current projects.

2.1 Process steps

No.	Procedure for initial certification	Submission / Dates	Responsible party
1	Admission		
1.1	Application	Upload the documents to the PM-ZERT certification portal at least nine weeks before the conformity check	Candidate
1.2	Certification Record F01		
1.3	Self-assessment of knowledge and skills (part of the certification record F01)		
1.4	References (part of the certification record F01)		
1.5	Candidate Legal Declaration - F01RE		
1.6	List of abbreviations		
1.7	Curriculum vitae (with brief description of the company)		
1.8	Executive Summary Report		
1.9	Conformity check and process briefing	Approx. one to three weeks after submitting the admission documents	PM-ZERT
1.10	Decision regarding admission to the assessment	Approx. one week after conformity check and process briefing	PM-ZERT
2	Assessment		
2.1	Level B Report (max. 25 pages with max. 15 pages appendix)	Upload at least four weeks prior to the exam	Candidate
2.2	Written exam - 180 minutes		PM-ZERT
2.3	Assessment Centre		PM-ZERT
2.4	Interview <ul style="list-style-type: none"> Interview for initial certification candidates 90 minutes Extended Interview for upgrade certification candidates - 120 minutes 		PM-ZERT
3	Conclusion		
3.1	Assessment result	Two weeks after the exam	PM-ZERT
3.2	Certificate issued	Six weeks after the exam	PM-ZERT

Table 5: Process steps Certification IPMA Level B

Notes:

- The process must be completed within 18 months from the date of admission. After this deadline, a new application must be made
- Each examination step may be attempted twice. The re-sit must take place within twelve months of the first attempt. The maximum total duration of the process remains the same, however.

2.2 Requirement to pass the certification

- Level B in all examination elements in the domain Project 23 CE out of a total of 28 CE, or in the domains Programme / Portfolio 24 CE out of 29 CE
- The minimum requirements of passing a CE are met if the candidate was able to demonstrate the competence required for Level B in at least 50% of the KCIs belonging to the CE
- If fewer than the minimum number of CE are assessed as passed, PM-ZERT will inform the candidate which parts of the test must be repeated or improved
- Detailed results will not be disclosed.

2.3 Application and admission

The provisions of Chapter 2.2.4 from the “General Guideline Certifications” apply to the application.

2.3.1 Certification record F01

The level and domain-related provisions of Chapter 2.2.5 from the “General Guideline Certifications” apply to the “Certification Record F01”.

2.3.2 Curriculum vitae

CVs are not required to follow any formal template, but need to contain the following information (as applicable):

- School and vocational training
- Training in project management
- Professional career
- Brief description of current employer
- Experience in project -, program or portfolio management (Evidence)

2.3.3 Executive Summary Report

Compare the information on the Executive Summary Report in the “General Guideline Certifications” Chapter 2.2.6.

The three most important ESR projects are to be summarised in one document. The text of these three ESR projects should be limited to a maximum of 15 pages.

Project (ESR1)

Contains information on the project selected by the candidate as the basis for his report.

Direct reference to complexity elements should emerge from the ESR. The following questions must be answered explicitly in the context of the domain applied for:

- How is the project embedded in your own company?
 - Name, sector and core business of your own company
 - Which projects are being carried out?
 - How are projects carried out in the company?
 - Importance of this project for the company.
- Own role in the company and in the project
 - Organisational integration in the core organisation
 - Area of responsibility
 - Organisational form.
- Brief description of the content
 - Objectives set and results achieved
 - Key stakeholders
 - Explanations and reasons for the complexity information.
- Management and leadership
 - How was the management of the project leaders, sub-projects, programmes, or associated projects organised in interaction with the disciplinary superior? (Domain project / programme)
 - How was the candidate competently involved in the management of the projects or sub-projects? (Domain Programme / Portfolio)
 - What powers and responsibilities did the candidate have in various escalation situations?
 - Describe the use of management and leadership in the implementation and representation/negotiation of the project within your own organisation and externally (e.g. client or subcontractor)
 - What influence did the candidate have on the scope of the individual projects or projects in the programme / portfolio domains?
 - How did the certifier validate and improve the skills of the project managers / sub-project managers allocated to the project or programme (project / programme domain)?
 - What organisational competence has the candidate used to validate and improve the skills of the project / programme managers in Portfolio? (Domain Portfolio).

- Significant challenges in the project / programme / portfolio
 - Description of significant deviations from the plan and how they were dealt
 - How were the necessary resources in terms of skills identified and allocated?
 - How was the overall risk management set up and validated?
 - How was change management established and managed?
 - How did the candidate deal with socio-cultural diversity?
 - Description of possible conflicts and/or crises, how they were handled and the impact on the project.

Project 2 (ESR)

Contains information on the next most relevant project in the opinion of the certifier. If this project involves the same company and the same role, a reference to the information in ESR1 is sufficient.

Project 3 (ESR)

See statements on project 2 (ESR).

2.3.4 Admission to the certification scheme

After the assessors have fully reviewed the documents, the candidate receives the admission decision approximately seven weeks before the examination date.

Notes:

- The certification fee is due upon admission
- If possible, reductions according to the fee schedule have not been entered, these cannot be taken into account retrospectively
- If the billing address has been entered incorrectly, additional fees will be charged.

The candidate will be informed of the names of the responsible assessors. An objection to the assessor allocation can be lodged with PM-ZERT within one week, stating the reasons. PM-ZERT will decide whether to recognise the reasons given.

The project, programme or portfolio selected for the report and its suitability for the desired level and domain is the responsibility of the candidate. The selection must fulfil the requirements for Level B in terms of complexity and domain. The validity of the selection is checked by the assessors as part of the authorisation process. If the selection is rejected, the assessors will provide a justification, which the candidate can respond to once.

In the event of non-admission, the assessors may request subsequent submissions.

During the admission process, a conformity check can be carried out by the assessors. The expectations of such a conversation will be communicated to the candidate in advance. As part of the direct discussion, aspects from the approval documents are scrutinised or checked for plausibility. The appointment is arranged by PM-ZERT in coordination with the applicant and the assessors.

The applicant can also prove fulfilment of the required prerequisites by making suitable additions to the application documents if this has been agreed with the assessors as part of the conformity check.

Following a positive decision in the conformity check, the applicant is admitted to the certification procedure in question. In the event of a domain change (deviating from the domain applied for) due to findings from the conformity interview, the domain change is confirmed in writing by PM-ZERT.

If a certificate applicant is not admitted despite subsequent delivery, he/she will be informed of the reasons for the decision in writing. In this case, an appeal can be lodged (see “General Guideline Certification”).

The certification procedure is divided into several procedural steps and components. The candidate is admitted to each step of the procedure on the basis of the performance demonstrated up to that point. This can lead to interruptions in the certification procedure if the candidate is unable to fulfil the requirements for the next stage of the procedure immediately. The continuation of the procedure is agreed between the candidate and PM-ZERT on the recommendation of the assessors.

All documents submitted are treated in accordance with the applicable data protection regulations and are not passed on to third parties or published without consent (see “General Guideline Certifications”).

2.4 Certification

2.4.1 Initial certification process

For initial certification, the steps in Table 5: IPMA Level B certification process steps must be completed.

2.4.1.1 Creation of a report based on the ESR

Please note the specifications in the chapter Creating a report based on the ESR in the "General Guideline Certification".

The **Level B Project, Programme or Portfolio** report must cover the candidate's personal experience in 16 mandatory CE and exactly 6 optional CE, at the specified competence levels.

The report will be rejected if the number of mandatory elements and the number of optional elements are not met or exceeded.

The report must provide evidence of the management challenges experienced during project, programme, or portfolio execution, and how they were met. The CEs against which the evidence needs to be provided, along with the respective target competence levels.

The report should identify the experiences in the project, programme or portfolio of the candidate as follows:

- Challenges in the management of the project, the programme or the portfolio and their team members
- How these challenges were dealt with
- What results were achieved
- Reflection on the results and derived lessons learned.

Management challenges should be presented at KCI level following the STAR method. However, rather than using sub-headings for each STAR element (e.g., S: <text> T: <text> A: <text>, R: <text>, which is deprecated), candidates are expected to present each KCI as continuous text.

When using the report template provided by PM-ZERT, the selection elements that are not required should be deleted from the report.

Not all KCIs of a CE must be treated. However, candidates may wish to bear in mind that at least 50% of a CE's KCIs must be **successfully** evaluated as competent in order to pass that CE.

To illustrate the evidence of experience in the project, programme or portfolio, suitable readable practical examples, e.g. reports, evaluations of the KCIs described, can be added in the appendix.

Assessment: Formally, the required 22 CE (16 compulsory elements and 6 optional elements) must be described. A CE is passed if 50% of the KCIs of a CE are positively assessed. To pass the report, 50% (= 11) CE must be positively assessed.

If the required competence elements are recognised as not fulfilled, the assessors decide how they are to be revised. The candidate will be informed of the result of the assessment by PM-ZERT.

Assessment: Reports must cover 22 CE (16 mandatory elements and 6 of the optional elements). A CE is passed if at least half of the KCI of a CE are assessed as showing sufficient competence. To pass the report, at least half (= 11) CE must be assessed as passed.

If the report cannot be assessed as passed, the assessors will specify in which form a revision may be provided. The candidate will be informed of the result of the assessment by PM-ZERT.

2.4.1.2 Written examination

In the Level B certification procedure, the candidate's knowledge is assessed in a written test (duration: 180 minutes).

Before the examination begins, the assessor checks the identity of the candidate. An identification document issued by a government authority must be kept ready, this can be either an ID card, driving license or passport. The identity of the candidate must be clearly deducible from this document.

Note:

- Some exam questions have a classic and an agile subtask. To pass these questions, both subtasks must be answered correctly.

2.4.1.3 Assessment Centre

The assessment centre is conducted as a role-play-based scenario using a case study scenario within a workshop. It serves to verify the self-assessment and evidence for the candidates by reflecting on their own PM competence, and for the assessors by “experiencing” the candidates as they work on the given task.

The assessors gain impressions for the assessment of practical PM skills and social competence from observing the candidates and their work results in addition to the documents submitted.

Equivalent variants of the assessment centre are:

- An approximately six-hour workshop with a case study scenario, which is worked on by the certificant in the team
- or**
- a workshop divided into two days with unrelated tasks, which are worked on by the certificant as a team.

The assessment criteria for the assessors' observations are:

- The target group-oriented development of technical and methodological results in accordance with the skills and abilities required for Level B
- The social behaviour when acting in a group and the competence in the associated KCI in accordance with the abilities and skills required for Level B.

The requirements for performance in the role play are fulfilled if at least 40% of the KCIs have been assessed as passed.

Project teams can be composed of Level C and Level B certificates (max. 12 participants per workshop). A Level B programme or portfolio manager can also take part.

The allocation of roles within the groups is carried out by the groups themselves or specified by the assessors. The desired domain must be taken into account. The assessors will provide the necessary information. The assessors provide information on this.

Depending on the variant of the role play, the assessors can conduct a feedback round individually or together with all candidates.

A role play assessed as “fulfilled” is a prerequisite for admission to the interview.

Actions by the candidate that lead to exclusion from certification:

- Own documents prepared in advance (written or electronic notes, laptop) may be used in the role play
- Copies or photos may be made of documents from the role-play, including those created by the candidate. If the candidate violates any of these rules, he/she will be excluded from the further certification procedure.

2.4.1.4 Individual interview

The interview leads to the final assessment of the candidate. It is always the last step of the assessment after all the assessment steps required for the level have been completed. An interview takes place between the candidate and two assessors. The content of the interview is determined by questions prepared and compiled by the assessors and dealt with during the open, individually organized interview.

The interview is accompanied by a presentation by the candidate on his or her report. The candidate must have prepared this presentation in advance, and it should be designed to last 15 minutes. The presentation must contain a big picture, lessons learned and, from the candidate's point of view, CEs that need to be emphasized. Prepared flip charts, metaplan layouts or PowerPoint presentations are permitted as aids. The assessors reserve the right to take an active role at any time during the presentation by asking specific questions.

Throughout the certification process, the assessors have maintained a document that provides information on the coverage of 80% of all CE required in ICB 4, as well as on the “fulfilled” or “not fulfilled” regarding the requirements of the KCI through the assessment steps already fulfilled. The evidence required for the desired level is also recorded in this document.

The candidate receives appreciative feedback on their performance in the certification process and advice for their further development in project, program, and portfolio management.

2.5 Upgrade certification

An upgrade certification to the next higher level is possible if a valid Level C certificate is available on the approval date.

For an upgrade certification from Level C to B, the Table 5: Process steps Certification IPMA Level B for certification IPMA Level B must be followed.

Based on the documented experiences, a different domain than the previously certified domain can be applied for. The assessors check the assignment to the domain for higher certification.

In the event of a domain change (different from the domain applied for) due to findings from the conformity meeting, the domain change will be confirmed in writing by PM-ZERT.

Note:

- If initial and upgrade candidates take part in an assessment, the workshop is binding for all candidates
- Upgrade candidates can choose
 - the variant with an assessment centre and interview

or

- can register to a round exclusively for upgrade candidates.

2.6 Granting of a certificate

After a candidate passes all required tests, and after PM-ZERT confirms adherence to the correct process, PM-ZERT will issue a certificate in the candidate's name. The certificate is valid for 5 years.

All certificates are registered with PM-ZERT and published on IPMA's website at www.ipma.world after about three to four months.

The IPMA has introduced digital badges (certification certificates). The procedure is explained at <https://ipma.world/news/do-not-forget-to-claim-your-ipmas-certification-badge/>.

Parts of the examination that have not been passed may be retaken once, against a fee, within 18 months from the date of admission. The fees are published as part of PM-ZERT's official fee schedule.

Only one resit per assessment element is allowed.

Dates for resits must be agreed individually with PM-ZERT.

If the certification process cannot be completed successfully, the candidate can re-apply after a period for twelve months.

3. Recertification

The recertification process and requirements are described in the "Guideline Level C/B/A Recertification".

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