

# Accredited Training Organization and Accredited Trainer SCHEME

for ITIL<sup>®</sup>, PRINCE2<sup>®</sup>, PRINCE2 Agile<sup>®</sup>, MSP<sup>®</sup>, M\_o\_R<sup>®</sup>, MoP<sup>®</sup>, MoV<sup>®</sup>, P3O<sup>®</sup>  
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[AXELOS.com](http://AXELOS.com)

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## Scope and Purpose of Document

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The purpose of this document is to set out the SCHEME rules which apply to all Accredited Training Organizations (ATOs) to become or remain accredited by an AXELOS accredited Examination Institute. It will be the ATOs' obligation to ensure third party compliance of Affiliates and Brokers with the obligations contained in this Scheme Brochure.

The document outlines the roles and responsibilities of all formally recognised parties within the qualification scheme, as well as the overarching principles and guidelines of the Scheme.

## Trade mark acknowledgement statements

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AXELOS Word Mark and symbology	Trade Mark Acknowledgement Statements
PRINCE2®	"PRINCE2® is a registered trade mark of AXELOS Limited"
PRINCE2 Agile®	"PRINCE2 Agile® is a registered trade mark of AXELOS Limited"
ITIL®	"ITIL® is a registered trade mark of AXELOS Limited"
M_o_R®	"M_o_R® is a registered trade mark of AXELOS Limited"
P3O®	"P3O® is a registered trade mark of AXELOS Limited"
MSP®	"MSP® is a registered trade mark of AXELOS Limited"
MoV®	"MoV® is a registered trade mark of AXELOS Limited"
MoP®	"MoP® is a registered trade mark of AXELOS Limited"

## 1. Overview

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### 1.1. AXELOS

AXELOS is a joint venture company between Capita and the Cabinet Office which came into being on 1st July 2013. AXELOS was formed to enhance delivery of the Global Best Practice Portfolio, accreditation and publishing services, including those products related to:

- portfolio, project and programme management
- IT service management
- cyber security

AXELOS owns the intellectual property rights in the Global Best Practice portfolio and will build on the existing business activities and develop products in new areas. The organization is intent on enhancing services and products to users through driving up quality, growth and innovation.

A primary focus is on stimulating the growth of a vibrant, open international ecosystem of accredited training, consultancy and examination organizations.

Further information on AXELOS can be found on the AXELOS website <https://www.axelos.com>

### 1.2. What does 'official SCHEME' mean?

The term "official SCHEME" refers to the rules documented in this and the Examination Institute (EI) scheme brochure for the administration of the qualifications to support the certification of individuals and third parties against specified AXELOS products.

This SCHEME has been reviewed alongside the new EI agreement, issued to EIs in October 2015. The revised SCHEME operates from 1<sup>st</sup> January 2016.

AXELOS has appointed several EIs who are responsible for the accreditation of their selected ATOs in accordance with the EI SCHEME Brochure. EIs that are part of the SCHEME are licensed and their details can be found on the AXELOS website.

This document outlines the roles of the ATOs within the SCHEME, the rules of the SCHEME, contact details and reference information for anyone wishing to check if a company is operating within the SCHEME.

AXELOS will provide marketing support to its accredited community through the Global Partner Programme.

## 2. Who is involved in the official SCHEME?

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### 2.1 AXELOS: the Owner

AXELOS owns the intellectual property rights of the AXELOS products which underpin this SCHEME. This includes guidance, qualification, syllabuses, sample papers and examination question databanks. The AXELOS products include internationally recognised products, including ITIL® for IT Service Management, PRINCE2® for project management and RESILIA™ for Cyber security. See *Annex A* for details of the products included within this SCHEME.

AXELOS is committed to maintaining and improving the guidance and related qualification in the SCHEME. Areas for improvement in quality that affect ATO service delivery are identified in *Annex B*. *Annex C* indicates aspects related to growth and innovation.

To achieve improvements AXELOS will work with organizations internationally to develop and share business and practitioner guidance within a world-class best practice framework. In particular AXELOS is responsible for initiating the consultation and update process to the official publications library. When a product update is planned, representatives from the accredited community will be invited to review products to ensure they remain appropriate to support the education and (personal) certification needs of the SCHEME.

Additionally AXELOS manages a Global Partner Programme to provide support to the accredited community. Joining details can be found on the AXELOS website.

Further information can be found on the AXELOS website <https://www.axelos.com>

### 2.2 AXELOS: The Accreditor

AXELOS is 'The Accreditor' for the products within the SCHEME and as such is responsible for the monitoring of the official SCHEME for EIs and training organizations.

The Accreditor:

- creates and maintains the qualifications SCHEME related to each of the products
- sets the standards and syllabuses throughout the market which any delivering EI must adhere to
- issues accreditation licences<sup>1</sup> to accredited organizations and recognized bodies (e.g. Operational Hubs) to enable delivery of training and examination services
- maintains a list of all licensed bodies and as appropriate, on receipt of a signed licence and accreditation licence fee, ensures these are listed on the AXELOS website
- accredits and monitors EI delivery to ensure these meet the SCHEME requirements, in particular the quality requirements. See *Annex B* for further details of quality improvements which are to be made during the life of the contract
- reserves the right to undertake spot checks on any of the bodies accredited by the EI and licensed within the SCHEME. These checks may include (but are not limited to) attendance at an exam centre or mystery shopper activity
- promotes awareness of the official SCHEME through a variety of international marketing activities, often in conjunction with the publisher, accredited organizations (e.g. EIs, ATOs and Accredited Examination Organizations (AEOs)) and/or industry recognized international bodies
- enables the accredited community to make AXELOS aware of non-compliance of organizations whether accredited or not
- sets up and chairs the governance bodies e.g. Qualifications Advisory Board - see *section 2.6*
- may generate and/or accredit<sup>2</sup> and/or appoint Courseware Providers to develop materials to

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<sup>1</sup> Previously known as "IP Licences"

<sup>2</sup> AXELOS expects to prepare some materials which an ATO may use to assist in building their courseware. These materials will require some amendment for use by the ATO (as a minimum to ensure they meet the ATO training style) and will need to be approved by the EI for the specific ATO before the material becomes operational.

support the educational activities. Designated materials to be made available to ATOs for use as part of accredited courseware

- AXELOS reserves the right to make changes to the SCHEME from time to time. EIs and accredited bodies will be notified of any changes and given a suitable period in which to implement them.

### 2.3 Examination Institutes (EIs)

An Examination Institute (EI) is an organization accredited and licensed by AXELOS which is thereby permitted to operate the qualification SCHEME through a network of accredited or approved organizations or partners.

All organizations accredited and duly licensed by AXELOS as EIs will be audited in accordance with good industry practice and those additional rules or standards being specific to this SCHEME. These are documented in the EI SCHEME brochure.

In accordance with the agreement signed with AXELOS, EIs shall be authorized and licensed to undertake, internationally for the AXELOS products each EI has agreed to deliver, the following activities:

- accredit training organizations through the standards and mechanisms included within the SCHEME
- administer examinations provided by AXELOS through those appropriately licensed organizations they have accredited or approved using the standards and mechanisms included within the SCHEME.

EIs shall be appointed to the EI Operational Group. This appointment shall provide the EI with an opportunity to contribute to the decision-making processes which may result in changes to the SCHEME rules and requirements if ratified through the AXELOS Qualification Advisory Board.

### 2.4 Accredited Training Organizations (ATOs)

Accredited Training Organizations (ATOs) are organizations that have been assessed and approved by an accredited EI, and have been licensed by AXELOS to deliver accredited training courses (classroom or e-delivery) and administer examinations<sup>3</sup> for delegates of those accredited courses.

An ATO is accredited to deliver its own training materials<sup>4</sup> to delegates on the courses it runs directly, through electronic delivery or through its Affiliates, unless otherwise specified in this SCHEME. Aligned to this,

- exams must only be purchased from the accrediting EI to service the needs of the delegates of the ATOs own training delivery, which includes that training offered through its Affiliates
- for the qualifications that operate under the pilot Courseware Provider Scheme, an ATO is NOT permitted to provide courseware to its Affiliates, unless it is licensed by AXELOS as a Courseware Provider for such qualifications

An ATO is an organization that has:

- submitted their Quality Management System (QMS), training materials and trainers for assessment by an EI
- successfully met the criteria as set out in this SCHEME brochure and any additional requirements of the EI conducting the assessment

<sup>3</sup> See Annex B: AXELOS is considering the relationship with ATOs with regard to examination delivery

<sup>4</sup> In the context "own training materials" are materials the ATO presents for accreditation and can confirm it has the right to do so either because it has developed them directly or has the necessary permissions to use the material

- paid the relevant accreditation licence fee (to the EI)
  - signed the AXELOS product accreditation licence and returned it to AXELOS.
- NOTE: the accreditation licence will be issued by AXELOS, once notified by the EI that the minimum criteria are met and the fee has been paid. The licence signatory system may be online in which case signing through that system may be accepted as 'returned to AXELOS'**
- complies with the SCHEME rules and the IP guidelines
  - agreed to undergo regular surveillance and monitoring, including monitoring of their licensed use of AXELOS intellectual property, to ensure they continue to meet the standards as verified during their initial accreditation assessment.
  - As part of their assessment by an EI an ATO must submit:
    - their QMS detailing their processes for the administration of training courses for the AXELOS products they deliver. Where appropriate this will also cover the delivery of examination sessions for the delegates trained on accredited courses
    - the course material for every course they utilize in training candidates in support of qualifications relevant to the AXELOS products
    - the trainers they require to be assessed in order for them to be approved to deliver the relevant accredited course using the ATO courseware. An accredited course requires an approved/accredited trainer. Each trainer must be 'put forward' by the ATO for assessment by the EI to be accredited as part of the ATO accredited team, whether they are within the ATO or an Affiliate or work as a trainer with multiple ATOs.

An ATO may seek to engage the services of other third party organizations to support the marketing and delivery of accredited training. **Section 2.4.1** discusses the different organizations that the ATO may work with. These third party organizations (Affiliates and Brokers) shall be subject to specific rules relating to their operation, which may include the monitoring and auditing of their activities by EIs, and certain third parties will be required to enter into a licence with AXELOS.

For further details on the role of an ATO, and their third party providers please refer to **section 3** of this document.

ATOs should note that their accreditation may be at risk if they, or the third parties they work with, do not operate in accordance with the SCHEME rules.

**NOTE: SCHEME rules for an ATO that produces and provides courseware to other training organizations have changed from May 2015. ATOs will be required to adhere to the pilot Courseware Provider Scheme requirements as set out in Annex F.**

## 2.4.1 ATO Third Party Relationships

In accordance with the SCHEME, ATOs are permitted to enter into third party agreements with other organizations to aid them in the marketing, promotion and growth of their organizations.

The two types of relationships which have been defined and are therefore permitted under the SCHEME rules are Affiliate and Broker (or Reseller).

### 2.4.1.1 ATO Affiliates

An Affiliate is a training organization that enters into a commercial arrangement with an ATO, to enable the ATO to work in different countries or in different regions of their own country, through a third party. The ATO is responsible for ensuring the Affiliate operates in accordance with the SCHEME with the EI providing additional oversight of the arrangements. To support this, the ATO needs to complete sufficient documentation confirming the Affiliate's details and how they are working together with regard to the specific products. The EI must satisfy itself that the Affiliate can meet the requirements of the SCHEME prior to initiating the process of requesting AXELOS to issue the accreditation licence to the Affiliate. It is expected that there will be regular contact between the Affiliate and their accrediting ATO around the Affiliates' activities.

**Note: Annex G sets out the minimum information that is required to be gathered in order for**



*an Affiliate to be submitted to the accreditation process. The ATO may use the form in Annex G to provide the Affiliate's details to the EI. Where an ATO or an EI has an alternative form or system in place then that may be used, provided that the information gathered and held includes the minimum information required under the SCHEME. The ATO shall promptly inform the EI of any changes to the information gathered.*

The ATO will make their accredited material and may also make their approved trainers available to run training courses in the product for which they are accredited.

**NOTE:** *In the case of qualifications that operate under the pilot Courseware Provider Scheme (see Annex F), an Affiliate must only purchase courseware from their ATO who must also be licensed as an AXELOS Courseware Provider.*

An Affiliate may also train individuals working for the Affiliate to the appropriate standard to become approved trainers. The ATO needs to confirm they meet the EI requirements, and submit the trainer to be assessed by the EI, to be recognized under the SCHEME, as trainers for the ATO.

#### 2.4.1.2 Brokers/resellers

A Broker is an organization that enters into a commercial agreement with an ATO to advertise, sell and/or schedule courses on behalf of the ATO. AXELOS must be notified of these organizations so that they can be monitored to ensure they comply with the IP guidelines.

### 2.5 Courseware Providers

A Courseware Provider is an organization approved and licensed by AXELOS to produce and distribute courseware, on a B2B (Business to Business) basis for the delivery of training towards specified AXELOS qualifications.

Each ATO is permitted to develop their own courseware for accreditation by their EI, for use in the delivery of training to its own candidates (excluding training delivered through its Affiliates); for those products covered by the pilot Courseware Provider Scheme, only Courseware Providers are permitted to distribute AXELOS approved courseware to its own Affiliates and to other ATOs.

See *Annex F* for further details of the pilot Courseware Provider Scheme.

Details of the pilot Courseware Provider Scheme and the courseware provider materials available can be found through the Global Partner Programme at <https://partners.axelos.com/log-in>

### 2.6 AXELOS Qualifications Advisory Board

The Qualifications Advisory Board (QAB) exists to enable AXELOS to manage the qualification SCHEME with the major focus being on individuals achieving the specific qualification status. Members of the Qualifications Advisory Board are invited to consider matters fairly, objectively and unbiased from commercial influences.

At its discretion, AXELOS will invite parties to become members of the QAB. Representation will be invited from specific interested parties within the community from around the world, and shall include, though is not limited to representatives from AXELOS, the AXELOS Examination Panel (i.e. Chief or senior examiners), Strategic EI Partners, members of the ATO community, professional bodies, user groups and the AXELOS publisher.

The AXELOS QAB operates in accordance with terms of reference and all members will be required to sign a non-disclosure agreement before they can participate.

#### 2.6.1 AXELOS ATO Working Group

The AXELOS ATO Working Group exists to enable AXELOS to consult with the accredited training community to support the operation of the official SCHEME, with the major focus being on working together to improve processes and to develop a closer partner relationship with the wider community.

ATOs who have registered with AXELOS for the Global Partner Programme will be appointed to the group through a nomination process through the partner portal. AXELOS will consider all nominations and issue invitations as it feels appropriate to ensure adequate representation for each product and geographical region.

Unless specifically confirmed, with the exception of AXELOS, individual organizations will have single membership to the group and will retain their seat for a period of two years. Group members can request additional representation for specific agenda items, and if agreed by the chair, these representatives can join for the duration of the specific agenda item.

Members of the AXELOS ATO Working Group are invited to consider matters of operational and business concerns in support of the QAB.

The AXELOS ATO Working Group operates in accordance with terms of reference and all members will be required to sign a non-disclosure agreement before they can participate.

## 2.7 EI Third Party Relationships (for examination delivery)

EIs are permitted to appoint third party organizations to conduct specific operational support and delivery activities, in line with set terms and conditions.

The following sections briefly outline these permitted relationships (from a SCHEME perspective).

### 2.7.1 Approved Examination Organizations (AEOs)

An Approved Examination Organization (AEO) is any organization approved by an EI and duly licensed by AXELOS which provides examinations, but does not provide training or education services. Where an individual organization is separately accredited as an AEO and ATO they must be able to demonstrate sufficient separation of functions, personnel and branding to provide confidence that the AEO and ATO activities are operated independently<sup>5</sup>.

Under the basis of this arrangement, the AEO will provide a physical testing location for exams to be taken, which must be supervised by invigilators/proctors that have been approved, or provided, by the EI, in accordance with the EIs QMS.

AEOs are **permitted** to offer the following services to an EI **only**:-

- candidate examination scheduling and registration
- marketing or promotion of examinations offered on behalf of the EI
- examination administration, ensuring appropriate supervision by an EI approved proctor/invigilator
- return of examination papers in the permitted formats (electronic or paper based as confirmed by an EI), and candidate details to the EI for processing.

AEOs are **not permitted** to:

- offer training services related to AXELOS products or leading to certification (unless as a separately accredited organization with sufficient separation of functions, personnel and branding, as an ATO)
- offer accreditation services leading to certification

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<sup>5</sup> AXELOS is currently investigating whether there is adequate separation in all organisations operating as an AEO and ATO and so this part of the scheme may be subject to change

- sell/re-sell examination papers
- develop, purchase, license or make use of any courseware or AXELOS intellectual property for the purposes of offering training
- use any AXELOS intellectual property in the promotion, marketing or provision of certifications, other than in respect of the examinations offered on behalf of the EI and in accordance with the IP guidelines
- mark examination scripts or confirm results, whether provisional or final, to candidates following an examination unless the examination invigilator/proctor is an employee of the EI, in which case provisional results can be provided
- print or hold stocks of certificates
- make certification decisions.

**NOTE: activities involved in the operation of AEOs may be subject to Accreditor's audit in line with the accreditation licence held by the AEO.**

### 2.7.2 Operational Hub (OH)

An Operational Hub (OH) is any third party entity or organization appointed by an EI which has been licensed by AXELOS to deliver the following services on behalf of an EI, using appropriate procedures and systems as defined within the EI's QMS.

**An OH shall be permitted to perform the following only:**

- operational customer contact
- coordination of the ATO accreditation and surveillance process, using assessors approved by the EI only
- distribution of examination papers supplied by the EI to ATOs, AEOs and ATO Affiliates (if directed to do so by the EI) in the permitted formats (electronic or paper based as confirmed by the EI)
- collection of the examination scripts from examination locations for processing by the Operational Hub and return to the EI for processing
- directly run public examination sessions
- marking of examination papers
- distribution of certificates supplied by the EI to candidates who have succeeded in an examination

An OH should not be confused with an EI's International or Overseas offices which are wholly owned subsidiary offices of an EI operating in that country.

**An OH shall not be permitted to:**

- offer training leading to certification
- act as an ATO, AEO or Computer Based Testing Assessment Agent (CBTA)
- market examinations or services in the name of their organization - all activities conducted by the OH must be branded in the name of the EI
- make certification decisions relating to examination or ATO accreditation outcomes or results, which must be made by the EI
- approve AEOs, which must be approved by an EI
- issue accreditation marks to ATOs or AEOs which must be issued by the EI
- appoint, license or contract directly or on behalf of an EI with any third party organization including, but not limited to, ATOs, AEOs, CBTAs or other OHs, to administer any aspects of the EI scheme brochure in relation to examinations or accreditation
- consider appeals from candidates or training organizations relating to any certification decisions made.

*NOTE: EI appointed OHs may be subject to audit by AXELOS.*

### 2.7.3 Computer-Based Testing and Assessment Agents (CBTA)

A Computer-Based Testing and Assessment Agent (CBTA) is any third party organization, operating under a commercial agreement with an EI, appointed to deliver examinations via computer-based testing and assessment methods, to remote computer-based testing locations and duly licensed by AXELOS.

## 3. Becoming an Accredited Training Organization

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### 3.1 What can an ATO do?

An ATO is permitted to conduct the following activities:

- run a schedule of accredited training courses leading to a qualification for those courses which have been accredited and approved by an EI
- use AXELOS trade marks and IP relating to the AXELOS portfolio under the IP guidelines as issued by AXELOS in support of this SCHEME or as set out in an accreditation licence from AXELOS
- reproduce the text and diagrams from the core publications to supplement their approved training material under the licence from AXELOS

**NOTE:** *In the case of qualifications that operate under the pilot Courseware Provider Scheme, courseware must be either created by the ATO for training their candidates or purchased from a Courseware Provider, See Annex F for details of the pilot Courseware Provider Scheme*

- order<sup>6</sup> examinations from their accrediting EI in accordance with the guidance issued to them. An ATO can only order examinations:
  - from their accrediting EI for candidates on one of their accredited courses, or accredited courses run through their Affiliate, where the ATO and/or Affiliate have been licensed by AXELOS for the delivery to their candidates
  - where exams are for use through an Affiliate, the exams purchased must be from an EI which recognizes the Affiliate through their ATO, as operating within the SCHEME
  - where an ATO uses vouchers from an EI they need to ensure these are registered in accordance with EI's rules so that suitable accounting takes place.
- confirm to the EI they have approved an organization as an Affiliate to support their marketing and delivery activities. Such appointments can only be made after the appropriate checks have been made to ensure the organization can meet the requirements of the Affiliate within the SCHEME
- appoint Brokers to support marketing and delivery activities
- contribute to AXELOS ATO Working Group to support the QAB (*see Section 2.6*)
- use agreed logos and statements to promote themselves as an accredited body under this SCHEME for delivery of specific products (e.g. PRINCE2).

### 3.2 What can an ATO not do?

An ATO is not permitted to:

- claim their accreditation is beyond the scope as awarded by their EI or multiple EIs if they hold concurrent accreditations
- significantly amend or change their approved QMS without first having this reviewed and signed off by their accrediting EI(s)
- act in any manner which would bring the market, their EI and / or AXELOS into disrepute
- create their own, or amend the official syllabuses
- create their own, retain or amend the official examination papers issued to them by their EI
- act in any manner that contravenes their contract with their EI

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<sup>6</sup> *Where ATOs are no longer allowed to administer exams directly, processes will be put in place to deal with candidate information. Candidate details will be passed onto EIs: - particularly where participation in an accredited training course is mandated (i.e. for ITIL Intermediate).*

- act in any manner that contravenes their accreditation licence from AXELOS
- in the case of qualifications that operate under the Courseware Provider Scheme, ATOs are not permitted to sell courseware on a B2B basis, unless the ATO is also a Courseware Provider. See *Annex F* for qualifications that operate under the pilot Courseware Provider Scheme
- sub-license or grant any rights associated with the use of AXELOS trade marks, copyright or other related intellectual property. This includes the appointment of any partner organizations to use any intellectual property (including trade mark words and/or logos) to market, sell or distribute the ATOs training courses or exams. The appointment of any such partner must be within the rules authorized by the ATOs, EIs and AXELOS
- reproduce core material of any commercial product for resale or redistribution, and may only reuse IP or copyright in the creation of, and in the direct support of, their accredited training courses
- republish or distribute content for profit without an appropriate licence from AXELOS
- offer examination services (including ordering examinations) for anyone other than for candidates they or their Affiliates have put through an accredited course.
- take over responsibilities from an EI, such as the:
  - creation of exam papers
  - accreditation of training organizations or Affiliates to deliver specific training
  - development of programmes leading to particular qualifications or perform supporting accreditation activities on behalf of the EI
  - marking of exam papers or providing provisional or final results<sup>7</sup>
  - selling examinations to candidates directly, independently of an accredited training service (unless as a separately Approved Examination Organization (AEO)).
- an ATO may not operate as an EI, Operational Hub or Computer Based Testing Agent. If the appropriate protections are in place a single organization may operate as an ATO and AEO. In addition
  - an ATO cannot be registered as an Affiliate for delivery of any product for which it is already accredited as an ATO
  - an ATO producing courseware for qualifications that operate under the pilot Courseware Provider Scheme must be licensed by AXELOS as a Courseware Provider in order to distribute the courseware to third parties on a B2B basis

### 3.3 What conditions do ATOs have to meet?

An organization will need to be able to show documented evidence to an accredited EI that they can satisfy a set of criteria which includes, but is not limited, to the following:

- an organization management structure, governance structure, legal status and financial viability (including financial probity)
- an organization quality control system including management review, internal audit, appeals and complaints procedures
- a course quality control system including any delegate acceptance criteria (including candidate identification checks where required)
- a course enrolment system and pre-course processing information
- logistical organization systems and procedures
- a document control system
- an administration staff training and appraisal system
- submit names of proposed trainers (who will need to meet the acceptance criteria set by the

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<sup>7</sup> PPM ATOs are currently permitted to provide provisional marks for PPM Foundation exams, where the course includes foundation and practitioner examinations. Once AXELOS, in conjunction with EIs and the QAB, confirms alternative processes this will no longer be an option. AXELOS will provide notice of such a change

EI)

- a full set of training material which covers the product syllabus for the qualification for which they are seeking accreditation
- must notify their EI and AXELOS (where appropriate) of third parties they intend to use as Affiliates and Brokers. This will enable appropriate licences to be provided as well as support any infringement investigations
- must provide evidence they are able to provide the candidate data to the EI in the required format.

Minimum requirements for accreditation of ATOs are as laid out in this document. Each EI may set additional requirements that an ATO must meet in order to apply for accreditation, in addition to the specific rules as outlined within this document. It is recommended that ATOs contact their accrediting EI for further clarification on the requirements that they will be expected to meet.

### 3.4 How can an organization apply to become an ATO?

An organization wishing to become an ATO may apply to any EI. They will be able to consider the fees and specific requirements from the EI and, should they feel they meet them, proceed with the application in accordance with the EI's processes.

#### 3.4.1 Can an ATO be recognised by multiple EIs?

Within the SCHEME it is possible for an ATO to choose to work with more than one EI. It will be up to the ATO to confirm the basis of their arrangements (e.g. may be focused on territory or subject matter).

Each EI will have specific arrangements for accrediting training organizations which the ATO will need to adhere to. Where the EI's QMS does not formally cover "cross recognition" then AXELOS expects the EI to undertake a full assessment as if the ATO only works for them.

#### 3.4.2 Training Organizations with existing accreditation at end of a calendar year

Those organizations recognized within the SCHEME are listed on the AXELOS websites. Existing accreditation of training organizations at the end of a calendar year is dependent upon the training organization meeting the EI requirements, paying the accreditation licence fee to the EI and then signing an AXELOS accreditation licence.

AXELOS will issue the relevant accreditation licence to the ATO provided that the EI has notified AXELOS that the ATO has been appointed. Additionally the ATO must also confirm their Affiliates and Brokers to the EI so these can also be registered / licensed as may be required under the SCHEME.

Should the SCHEME requirements not be met and / or the accreditation licence fee not be settled in the appropriate timeframe then AXELOS will deem the ATO accreditation to have lapsed. In this event the ATO will be removed from the website listings and must cease to offer accredited courses. Any EI they were working with will also need to ensure they update their records to show that the accreditation has lapsed and that an appropriate exit management plan is in place to support the outgoing ATO's third parties.

#### 3.4.3 ATO Exit Management

The exit management plan in the accreditation licence sets out the main activities for the orderly exit of an ATO from the SCHEME. This includes an obligation to ensure Affiliates also exit the SCHEME in an orderly manner.

The purpose of the activities is primarily to ensure all matters related to the IP are suitably addressed and any obligations fulfilled in a timely manner.

**Section 9** of the licence covers consequences of termination or expiry.

Subsections from the ATO Licence requirements:

Subsection 9 from ATO licence	Description
"The licence granted under clause 2 shall terminate immediately"	As soon as notification is received, the ATO must stop delivering courses related to the SCHEME
You shall if so requested by Us, execute an assignment in favour of Us (or such other person as We may direct) of (i) any and all goodwill in the Trade Marks as may have accrued to You by reason of the use of the Trade Marks or by Your being connected with the Trade Marks in the course of trade and/or (ii) all such rights (if any) as may have accrued to You in relation to the Trade Marks by reason of such use"	Any outstanding payments due to AXELOS as a result of the activities under the licence must be paid to AXELOS
"You shall not later than 5 Working Days from the date of termination or expiry provide any outstanding reports required by Us or Your Examination Institute in accordance with Clause 10"	Submit outstanding reports within the timeframe stated. Reports can be to both or either AXELOS or the EI
"You shall not later than 5 working days from the date of termination or expiry remove or destroy the Trade Marks and/or Copyright Material from all and any materials comprising or used in connection with the Products in Your possession, custody or control;"	An ATO is not permitted to use the Trade Marks or copyrights on any training, marketing or any material making reference to the SCHEME
"use reasonable endeavours to notify persons in possession of a copy of the Product that has not yet been supplied to an end-user"	An ATO must ensure that partners are made aware of the termination and limitations of the material in their possession
"You shall promptly but not later than 6 weeks from the date of termination or expiry cause the Trade Marks and the Copyright Material to be removed or obliterated from all and any materials comprising or used"	An ATO must ensure that all reference to the AXELOS IP is removed ensuring their association with AXELOS is terminated within 6 weeks
"Subject to the provisions of this Clause 9 You shall do nothing after the expiry or termination of this Licence Agreement which might lead any person to believe that You are still licensed to use the Trade Marks or Copyright Material or are in any other way connected with Us"	A training organization is prohibited from offering or be seen to be offering the services that of a licensed ATO following the termination

### 3.4.4 Associate Trainer arrangements

Within the SCHEME it is possible for a trainer to work with multiple ATOs though the focus is on the ATO to ensure the trainer meets their quality requirements. When being appointed as an associate trainer to a second or subsequent ATO, the associate trainer must:

- be an approved trainer for the product they are due to train in
- confirm their contract with their sponsoring ATO does not prohibit them working for other



ATOs<sup>8</sup>

- confirm their contract with each ATO does not prohibit them from working for multiple ATOs
- have successfully undergone trainer familiarization training with the ATO that they are an associate of, and
- have their familiarization recorded (registered) by the EI of the ATO that they are an associate of

An ATO using associate trainer(s) shall ensure they meet the above requirements.

### 3.5 ATO Third Party Relationships

Under the SCHEME, ATOs are permitted to enter into third party agreements with other organizations to aid them in the marketing, promotion and growth of their organization.

AXELOS has defined three types of relationship which are permitted under the SCHEME, i.e. Courseware Provider, Affiliate and Broker (or Reseller) relationships. Where an ATO works with bodies under these categories then the ATO must have documented procedures as part of their QMS covering the assurance and monitoring of their partner organization(s) and provide such documentation to the accrediting EI in accordance with their reporting requirements.

The ATO is also responsible for confirming these appointments to the EI so that any accreditation licence fees and licensing requirements can be met.

#### 3.5.1 ATO Affiliates

##### 3.5.1.1 What is an Affiliate?

An Affiliate is a training organization which enters into a commercial arrangement with an ATO, to enable that ATO to work in different countries or in different regions of their own country, through a third party.

Subject to the requirements of the pilot Courseware Provider Scheme, the ATO will make its accredited material and may make their approved trainers available to run training courses in the product for which they are accredited.

##### 3.5.1.2 What rules apply to Affiliates?

Under the SCHEME, the following rules apply to Affiliates:

- Affiliates must use training material provided by their ATO partner, as accredited by their EI

***NOTE: In the case of qualifications that operate under the pilot Courseware Provider Scheme (see Annex F), Affiliates must only use courseware from their ATO partner, who must also be licensed by AXELOS as a Courseware Provider***

- Affiliates must be licensed by AXELOS and adhere to the relevant IP guidelines before they can offer the related training course
- Affiliates can only use AXELOS IP for the material that it has been licensed to use. In advertising it must clearly state that they are an Affiliate of the ATO who holds the accreditation
- Affiliates must market courses in the name of the ATO (e.g. as delivered by the ATO or by stating the course is run in association with the ATO)
- Affiliates must work in accordance with the QMS of the ATO, which has been approved by the

<sup>8</sup> Note, individuals approved by AXELOS, e.g. chief or senior examiners on AXELOS Examination Panel, are recognized as associate trainers and do not have a sponsoring ATO, this continues to be acceptable as long as the familiarization and training delivery elements meet the EI assessment.

EI. In cases where they do not use this then their QMS must be approved by the EI (who will confirm the consistency of the ATO approach - or detail how any inconsistencies are being dealt with)

- all trainers working on behalf of the Affiliate must be assessed by the EI which has accredited the ATO as if they were trainers working for the ATO
- Affiliates will be subject to spot checking and audit by the EI, and AXELOS, in the same way that the ATO would be subject to audit
- Affiliates must only use the “Licensed Affiliate” mark and must not use the “Accredited by” (EI) mark which is for use by ATOs only
- the Affiliate logo will only be provided to Affiliates once the accreditation licence has been signed and returned to AXELOS and the fee has been paid and the Affiliate has been signed off by the EI
- Affiliates must sign a licence for the use of associated IP directly with AXELOS
- Affiliates must work within the limitations of the SCHEME as described by the ATO and in all other ways as determined by this SCHEME brochure and the contract between the ATO and their EI
- Affiliates must adhere to all AXELOS guidance regarding the correct use of IP and trade marks as outlined within the accreditation licence issued to the Affiliate by AXELOS. The Affiliate’s ATO is responsible for ensuring that the Affiliate complies with these guidelines
- the ATO has a responsibility to ensure that the Affiliate adheres to all requirements of their accrediting EI and the SCHEME. The ATO and the Affiliate may incur sanctions from the EI, or AXELOS, where this is not the case depending on where the non-conformity lies. In particular the ATO is responsible for ensuring that an Affiliate who leaves the SCHEME adheres to the exit requirements in relation to the use and destruction of AXELOS IP
- each EI can determine the method they use to process examination orders from Affiliates
- AXELOS expects orders to be made by the ATO on behalf of the Affiliate, but acknowledges that the (physical) exam papers may be delivered directly to the Affiliate. The EI processes will confirm any checks and constraints they make in this regard
- before an Affiliate is provided with examinations directly from an EI, the EI must be provided with details of the scope of products offered by the Affiliate through their agreement with the ATO
- the EI will confirm that the Affiliate is not already registered with AXELOS as an ATO for the product they are delivering as part of their arrangement with this ATO
- EIs must report all Affiliates to AXELOS for licensing purposes
- reports must be provided as often as the ATO reports to the EI and AXELOS unless otherwise notified.

### 3.5.2 ATO Brokers (Reseller)

#### 3.5.2.1 What is a Broker (Reseller)?

A Broker is an organization which enters into a commercial agreement with an ATO to advertise, sell and/or schedule courses on behalf of the ATO. The rules below relate to those services offered in relation to the AXELOS accredited courses that the ATO is accredited to run.

#### 3.5.2.2 What rules apply to Brokers (Reseller)?

Under the SCHEME, the following rules apply to Brokers:-

- ATOs must ensure that their Brokers / Resellers include the following statement when advertising courses on behalf of the ATO (together with the appropriate IP acknowledgement statement): “Accredited (COURSE NAME) training is provided by (NAME OF ATO), accredited by (NAME OF EI) Examination Institute”.

- Brokers / Resellers must adhere to AXELOS guidance on the correct and permitted reuse of IP and trade marks. This guidance must be provided to the Brokers / Resellers by the ATO
- The ATO will be responsible for ensuring that Brokers / Resellers must not:
  - contract/employ trainers
  - license, develop or purchase course materials
  - provide or claim to provide training
  - provide or claim to provide examinations directly
  - order examination papers from an EI or ATO/Affiliate
  - Brokers / Resellers will not be issued with an accreditation licence or IP licence by AXELOS and therefore cannot reproduce any IP other than the word mark, which must be correctly acknowledged in line with the IP guidelines provided to the ATO
  - Brokers / Resellers are permitted to use material from the syllabuses but are not permitted to use sample examination papers or questions to promote ATO courses.

## 4. Criteria for Delivery of Accredited Training Courses and Accredited Trainers

The following information outlines the basic requirements for accredited trainers and ATOs delivering training at all levels of the current official accredited training programme.

### 4.1 Minimum requirements for trainer application

In order to be accredited as a trainer, each applicant must:-

- hold the AXELOS Certification in the subject they intend to train
- have a minimum of 3 years practical experience in the subject
- demonstrate the ability to manage, run and deliver training courses
- have a minimum of 10 days experience delivering classroom based training (this could be as “trainer under instruction”):
  - this may include delivering AXELOS courses with an accredited trainer present
  - where the experience is not from an AXELOS product, the applicant trainer must have delivered material in a related subject for the minimum period to demonstrate competence as a trainer. Their subject knowledge will then be assessed by the EI. Course delivery will be monitored in the classroom, including checking feedback from delegates. If there is a problem in the classroom the assessor may stop the course if a suitable alternative trainer cannot be assigned
  - meet the qualification specific trainer criteria detailed in *Annexes D and E*.

### 4.2 Minimum requirements for course delivery

In order for a course to be deemed accredited it must:

- be provided by an ATO, or an Affiliate
- use accredited courseware (classroom or distance learning) of the ATO. This may be material created by the ATO or offered under licence from a Courseware Provider and potentially amended to ensure that it is correctly branded for the ATO and meets the requirements of the IP guidelines and the SCHEME
- be delivered by an accredited trainer, or where a trainer is ‘under instruction’ the course must be run in the presence of an accredited trainer or EI assessor
- be held in an appropriate venue
- meet the SCHEME criteria for delegate class size and trainer/delegate ratios (where these exist)
- provide all delegates with access to the official manual for courses leading to an open book exam (e.g. PRINCE2 practitioner).

**Note:** Where the course leads to an open book examination ATOs must either:

- provide a manual as part of the course or ensure that the candidate has access to a manual during the examination or
- ensure that the candidate knows where to obtain a copy of the manual.

Where exams are bundled with the training course, the ATO must order exams through their accrediting EI and must:

- ensure that there is a suitably qualified invigilator/proctor<sup>9</sup>
- ensure the room is set up as an exam centre
- comply with the requirements of the EI in terms of the delivery, collation and return of exam

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<sup>9</sup> A trainer may be a ‘qualified invigilator’

papers and all related materials

- ensure candidate pre-requisites are met and recorded prior to the appropriate examinations.

**Note:**

- where candidates are taking distance learning courses, the ATO should ensure that the candidate is issued with a voucher for the examination to be taken with a suitable examination centre
- where exams are NOT bundled with the training course the ATO should ensure the candidate is informed of the options available to sit the examination.

## 5. Glossary of Terms and Acronyms

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AEO	Approved Examination Organization	A third party organization which is approved by an EI to hold examination sittings only, via approved mechanism within an EIs QMS or Quality material.
Affiliate	Affiliate	A third party training organization which enters into a commercial arrangement with an ATO, is approved by their accrediting EI and is licensed by AXELOS to offer training.
AO	Accredited Organization	Is the collective term for an organization within the AXELOS accreditation scheme (i.e. EIs, ATOs, AEO, Affiliates, and Brokers).
ATO	Accredited Training Organization	An organization accredited by an EI and licensed by AXELOS to run training courses leading to AXELOS qualifications.
AXELOS	The (Official) Accreditor	A function of AXELOS as The Official Accreditor for the AXELOS qualification and accreditation SCHEME and specific licensing activities.
Broker	Broker or Reseller	A third party organization which enters into a commercial agreement with an ATO to advertise, sell and/or schedule courses on the behalf of the ATO.
CBTA	Computer-Based Testing and Assessment Agent	A third party organization which provides online examination delivery services to an EI to remote computer-based testing locations.
Courseware Provider	Courseware Provider	An organization approved and licensed by AXELOS to develop courseware leading to specified AXELOS qualifications.
EI	Examination Institute	An organization accredited and licensed by AXELOS to administer the assessment of ATOs and delivery of examinations to the market place.
Global Partner Programme	Global Partner Programme	AXELOS marketing support service designed to give the accredited community the best possible help, advice and support across AXELOS product suites.
OH	Operational Hub	A third party organization appointed by an EI to support examination delivery services which has been authorised and licensed by AXELOS.
QAB	Qualifications Advisory Board	A board convened and chaired by AXELOS that includes representation from all interested parties including, but not limited to representatives of AXELOS, Strategic EI Partners, ATOs, professional bodies, user groups and the examination panel. The QAB is responsible for providing advice on the standards for certification and examination schemes.
QMS	Quality Management Systems	The documented Quality approach of an organization including details of the organization's processes, procedures and policies. There may be an associated quality manual.
Third Party	Third Party	A third party organization appointed by an EI to administer examinations provided by the EI directly to candidates.

## Annex A: Products that can be offered by an ATO under this SCHEME

An EI must be able to offer examinations/qualifications in the available languages as provided by AXELOS and offered under the Qualifications SCHEME. These materials may be updated from time to time as directed by AXELOS.

The following list covers those examinations currently considered to be part of the SCHEME. Some accredited EIs may choose not to offer all exams in all languages. In that case they will clearly identify on their website which qualification/language combinations they do offer as well as the distribution channels through which these are available.

ATOs can choose how many of the qualifications they wish to support with accredited training as well as the languages in which they deliver the training. In some cases examinations will not be available in all languages, but ATOs can help promote the approach by teaching in the local language. Where candidates take an exam in a different language they can be given additional time (max 25% extra, e.g. for a one hour exam allowance is 15 minutes extra, on a three hour exam there is an additional 45 minutes).

**NOTE: Some of the listed qualifications below do not carry a need for accredited training (e.g. re-registrations). Re-registration examinations passed lead to a new practitioner certificate being awarded with a revised renewal date.**

### AXELOS Examinations

#### ITIL

- ITIL Foundation Certificate in IT Service Management
- ITIL Practitioner Certificate in IT Service Management
- ITIL Intermediate Certificates:
  - Service strategy
  - Service design
  - Service transition
  - Service operation
  - Continual service improvement
  - Service offerings and agreements
  - Release, control and validation
  - Operational support and analysis
  - Planning, protection and optimization
- ITIL Managing Across the Lifecycle leading to the ITIL Expert Certificate
- ITIL Master Qualification

#### PRINCE2

- PRINCE2 Foundation certificate in Project Management
- PRINCE2 Practitioner certificate
- PRINCE2 re-registration
- PRINCE2 Professional (assessment centre run by an ATO)

#### PRINCE2 Agile

- PRINCE2 Agile Practitioner certificate in Agile Project Management

### MSP

- MSP Foundation certificate in Programme Management
- MSP Practitioner certificate
- MSP Advanced Practitioner certificate
- MSP Practitioner re-registration
- MSP Advanced Practitioner re-registration

### M\_o\_R

- M\_o\_R Foundation certificate in Risk Management
- M\_o\_R Practitioner certificate
- M\_o\_R re-registration

### MoP

- MoP Foundation certificate in Portfolio Management
- MoP Practitioner certificate

### MoV

- MoV Foundation certificate in Value Management
- MoV Practitioner certificate

### P3O

- P3O Foundation certificate in Portfolio, Programme and Project Offices
- P3O Practitioner certificate
- P3O re-registration

*NOTE: AXELOS will provide updates to exam materials to Els as frequently as deemed necessary to maintain the integrity of the exam delivery. For those materials that impact training delivery (syllabus and sample papers) AXELOS will aim to provide an update no more than twice annually per product. AXELOS reserves the right to provide additional updates where serious quality issues or security breaches need rapid resolution.*



## Annex B: Driving quality improvements

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AXELOS is committed to driving up quality across the whole delivery of qualification and education services to support the official SCHEME. Where appropriate, timelines will be associated with these improvements as AXELOS gains further understanding of the implementation aspects that will bring benefit to candidates as well as additional protection of intellectual property. AXELOS has made some progress and expects to continue working in the areas listed below with the support of the accredited community.

Areas which ATOs are expected to improve, or support implementation of improvements, include:

- all exam candidate identities to be thoroughly checked before they sit an exam. Default is through provisions of formal photographic identification e.g. National ID card/passport, driving licence, military card, employer identification card. Where the candidate legitimately does not possess such identification then 2 forms of documented evidence of identification/address must be sought
- additional clarity on the checks on pre-requisites before a candidate sits an exam - in particular, examination and training elements should be confirmed before a candidate sits an exam rather than withholding results until checks can be completed
- ensure messages are accurately passed to an ATOs third party, in a timely manner
- submit trainers for evaluation by the EI on their ability to deliver the specific training course using the accredited ATO courseware
- ATO adherence to the IP guidelines to be more consistent so EIs will be scrutinizing this element more closely; includes ensuring the accredited materials are only used in accordance with the SCHEME (i.e. not separately issued through commercial channels without appropriate accreditation licences)
- providing feedback to AXELOS on areas that can be improved as well as quality failings within the marketplace
- grey training - where an ATO believes this is happening is required to provide AXELOS with details so this can be investigated. AXELOS anticipates setting up a portal to enable this to be a totally secure system
- AXELOS will issue updates no more than 2 per year for a given product. Specifically this material covers updates to syllabuses and sample papers. Once released by AXELOS, through EIs, ATOs will be expected to make the changes to their materials in an agreed timeframe (expected to be 3 to 6 months and will be confirmed on a case by case basis). Additional consideration also needs to be given (and confirmed) concerning the release of translated materials.
- AXELOS will explore “universal recognition of ATOs” and how this might be implemented to support improvements in quality.

## **Annex C: Growth and innovation**

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AXELOS is committed to driving growth and innovation in the delivery of the SCHEME and ensuring it remains relevant to individuals and organizations.

To support growth AXELOS will undertake joint marketing with accredited bodies.

AXELOS will endeavor to balance the quality and security elements appropriately when developing or changing processes to enable innovations to be implemented.

### **AXELOS Global Partner Programme**

AXELOS Global Partner Programme is an initiative of the Sales and Marketing team that comes with the AXELOS badge of quality.

AXELOS accredited organizations can register online and in doing so organizations are recognized as a Certified Partner. The Global Partner Programme offers access to a members-only library of sales and marketing support documents, information and additional resources.

Further information on the Global Partner Programme and registration can be found on the website: <https://partners.axelos.com/home>

## Annex D: ITIL Trainer Requirements

All trainers must be subjected to an assessment by the EI to ensure the high standard of the training course is maintained. All trainers must satisfy the generic trainer requirements in *section 4.1*.

### D.1 ITIL Foundation Certificate in IT service management Trainer Requirements

The ITIL Expert Qualification is not mandatory to deliver the ITIL Foundation training course, although it is recommended

<p>All new trainers must meet the following criteria:</p>	<p>Hold the current ITIL Foundation Certificate - includes foundation + bridge (2 credits)</p> <p>Hold a minimum of an additional seven credits from ITIL Intermediate qualifications</p> <p>Meet the EI delivery requirements</p> <p>Note re non-English delivery: Trainers must hold a minimum of 9 credits through ITIL qualifications (Foundation, Intermediate or ITIL Expert) within six months of launch of exams in the language in which they intend to deliver ITIL training.</p> <p>Where the qualifications have existed in the language for more than six months then the trainer needs to meet the nine credit requirement to become accredited in delivery in that language.</p>
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### D.2 ITIL Practitioner Certificate Trainer Requirements

The ITIL Expert Qualification is not mandatory to deliver the ITIL Practitioner training course, although it is recommended.

<p>All trainers must meet the following criteria:</p>	<ul style="list-style-type: none"> <li>• Hold the current ITIL Foundation Certificate - includes foundation + bridge (2 credits)</li> <li>• hold the ITIL Practitioner certificate</li> <li>• hold either the ITIL Expert certificate or hold a minimum of 12 total credits in the ITIL® examination programme:             <ul style="list-style-type: none"> <li>○ 2 Credits from ITIL Foundation</li> <li>○ 3 Credits from ITIL Practitioner</li> <li>○ 3 Credits from ITIL Intermediate Continual Service Improvement (CSI)</li> <li>○ 4 additional credits from the ITIL certification programme</li> </ul> </li> </ul> <p><b>Note:</b> Trainers who currently satisfy the requirement of 12 total credits but do not hold the required CSI credits, will have an additional period until 31<sup>st</sup> December 2016 to acquire those credits. From 1<sup>st</sup> January 2017, trainers are required to hold 3 CSI credits.</p>
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### D.3 ITIL Intermediate Module Certificate Trainer Requirements

Trainer Requirements	Trainers must hold the ITIL Expert Certificate and the certificate for the intermediate module they wish to teach Meet the EI delivery requirements
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### D.4 ITIL Managing Across the Lifecycle (MALC) Trainer Requirements

Trainer Requirements	Trainers must hold the ITIL Expert Certificate (i.e. M A L C qualification) Meet the EI delivery requirements
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### D.5 Applicable Exemptions for ITIL Trainers

Trainers, sponsored by their ATO, where attendance at a training course is mandatory have the option of not attending a training course for ITIL Intermediate examinations (i.e. are able to take the exam via an EI directly). This requirement may be subject to change as AXELOS look to ensure high quality delivery of training.

## Annex E: PPM Trainer Requirements

Trainers will be subjected to an assessment by their EI for the delivery of a training course using the specific training materials of the ATO. All trainers must satisfy the generic trainer requirements in *section 4.1*.

### E.1 PRINCE2 Trainer Requirements

Foundation/Practitioner	Must hold PRINCE2 Practitioner Have three years project management experience
PRINCE2 Professional Assessor	Must hold PRINCE2 Professional

### E.2 PRINCE2 Agile Trainer Requirements

Practitioner	Must hold PRINCE2 Practitioner Must hold PRINCE2 Agile Practitioner Have three years relevant experience across portfolio, programme and project management, including some agile experience
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### E.3 MSP Trainer Requirements

Foundation	Must hold MSP Practitioner Have three years programme management experience
Practitioner	Must hold MSP Practitioner Have three years programme management experience
Advanced Practitioner	Must hold MSP Advanced Practitioner Have three years programme management experience

### E.4 MoP Trainer Requirements

Foundation/Practitioner	Must hold MoP Practitioner Have three years portfolio management experience
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### E.5 M\_o\_R Trainer Requirements

Foundation/Practitioner	Must hold M_o_R Practitioner Have three years risk management experience
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### E.6 MoV Trainer Requirements

Foundation/Practitioner	Must hold MoV Practitioner Have three years value management experience
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## E.7 P30 Trainer Requirements

Foundation/Practitioner	Must hold P30 Practitioner Have three years relevant experience across portfolio, programme and project management
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PPM ATOs and trainers are expected to be able to run Foundation and Practitioner courses for all products they are accredited to deliver. Additionally for MSP the ability to run the Advanced Practitioner course is an advantage but not mandatory.

## Annex F Pilot Courseware Provider Scheme

A Courseware provider is an organization approved and licensed by AXELOS to produce courseware for the delivery of training leading to specified qualifications operating under the pilot Courseware Provider Scheme.

A Courseware Provider may operate as an ATO, however, must also obtain a Courseware Provider Licence from AXELOS in order to distribute their courseware to third party organizations.

### F.1 Qualifications that operate under the pilot Courseware Provider Scheme

The current pilot Courseware Provider Scheme applies to the following qualifications:

- PRINCE2 Agile
- ITIL Practitioner

### F.2 A Courseware Provider must:

- Be accredited by an EI as an ATO and meet the EI requirements for the delivery of certification training
- be approved and licensed by AXELOS as a Courseware Provider to distribute courseware
- adhere to AXELOS requirements in accordance with the Courseware Provider Agreement
- collate and send consolidated reports to AXELOS each month in accordance with the Courseware Provider Agreement

### F.3 What can a Courseware Provider do?

- Reproduce the text and diagrams from the core publications for the development of their courseware
- use AXELOS trade marks and IP relating to the AXELOS portfolio under the guidelines as issued by AXELOS in support of this SCHEME or as set out in an Courseware Provider Agreement with AXELOS
- distribute courseware for the delivery of qualifications operating under the pilot Courseware Provider Scheme to ATOs or under their own ATO accreditation to their Affiliates
- use agreed logos and statements in accordance with the Courseware Provider Agreement

### F.4 What can a Courseware Provider not do?

- Claim their agreement is beyond the scope as awarded by AXELOS
- act in any manner which would bring the market and / or AXELOS into disrepute
- create their own, or amend the official syllabuses
- act in any manner that contravenes the Courseware Provider Agreement with AXELOS
- act in any manner that contravenes the accreditation licence from AXELOS
- sub-license or grant any rights associated with the use of AXELOS trade marks, copyright or other related intellectual property. This includes the appointment of any partner organizations to use any intellectual property (including trade mark words and/or logos) to market or distribute the approved courseware
- offer any training services other than those under their ATO accreditation
- offer any examination services

#### F.5 How can an organization apply to become a Courseware Provider under the pilot Courseware Provider Scheme?

An organization which meets the eligibility criteria may apply to become a Courseware Provider by completing an application form available at [Accreditation@AXELOS.com](mailto:Accreditation@AXELOS.com) or <https://www.axelos.com>



Affiliate checklist form  
December 2015

AXELOS.com

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# 1 Introduction

This form is to be completed by the ATO and submitted to their Examination Institute as part of the accreditation process for Affiliates. The form may be held in electronic or paper form but must be stored and made available upon request for audit purposes.

This form sets out the minimum information that is required to be gathered for an Affiliate in order for them to commence the accreditation process. Where an ATO or an Examination Institute has an alternative form or system in place then that may be used in place of this form; provided that the information gathered and held meets the minimum requirements detailed below.

It is the ATO's responsibility to ensure that this accreditation process has taken place.

## 2 Affiliate details

Please ensure all sections are completed fully. Your Examination Institute must be informed of any changes to the information below. Failure to provide up to date information may result in your Affiliate not receiving their Accreditation licence.

Affiliate name:	
Affiliate Address:	
Company Registration Number:	
VAT number:	
Affiliate Contact Name:	
Affiliate Contact Name:	
Affiliate Contact Email:	
Licence Signatory Name (if different to above):	
Licence Signatory Email (if different to above):	
Affiliate Contact Telephone Number:	
Name of ATO Affiliated to:	
Primary Accrediting Examination Institute:	
Accredited Product(s):	
Date of Agreement between ATO and Affiliate (for Affiliate activities):	

### 3 Scope of Affiliate activities

Please provide details around your organizations relationship with your Affiliate and how you will work with them. If this differs for different products please supply details. All sections must be completed. Your Examination Institute must be informed of any changes to the information below.

Scope of Affiliate activities:	
Scope of Affiliate activities for each product e.g. provision of facilities, trainer, invigilator, etc.:	
Name of trainer (if applicable) for each product:	