



City & Guilds Level 3 Certificate in the Principles of Online and offline Marketing (9628- 12)

Version 2.3 (January 2025)

Qualification Handbook

Qualification at a glance

Subject area	06.1 Digital technology (practitioners)
City & Guilds number	9628
Age group approved	16+
Entry requirements	Centres must ensure that any pre-requisites stated in the What is this qualification about? section are met.
Assessment	E-assessment , Multiple-choice exam
Grading	Pass/Fail
Approvals	Approval application required
Support materials	Sample assessments
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Title and level	City & Guilds qualification number	Regulatory reference number	GLH	TQT
City & Guilds Level 3 Certificate in Principles of Online and Offline Marketing	9628-12	603/1608/1	72	163

Version and date	Change detail	Section
2.0 April 2018	Test specification detail updated	Assessment
2.1 December 2019	Unit 312 and suggested learning resources	Assessment
2.2 July 2024	Addition of Quality Assurance	Centre Requirements
2.3 January 2025	Handbook transferred to latest version of the template. The section on Quality Assurance has been updated and sections on Inclusion and diversity, and Sustainability have been added.	All

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1 Introduction

This document tells you what you need to do to deliver the qualification:

Area	Description
Who is the qualification for?	This qualification is designed to support learners to develop a full range of underpinning knowledge that can be used in a variety of businesses and industries that demonstrate confidence and transferability in a Digital Technology Environment.
What does the qualification cover?	<p>A successful Digital Marketer will be expected to understand, use and review a variety of online and offline marketing techniques to support the delivery of marketing campaigns. This qualification provides the successful learner with the underpinning knowledge of a range of marketing channels and their appropriate uses. This will allow them to define, design, build and implement digital campaigns across a variety of online and social media platforms, enabling them to drive the acquisition, engagement and retention of customers.</p> <p>Some of the topics covered include:</p> <ul style="list-style-type: none">• The key components of a marketing campaign• The different channels to engage different customers within different segments• The benefits, limits and risks of customer relationship marketing• The importance of collaboration in delivering marketing campaigns, including typical team structures, shared objectives and how to influence others.
What opportunities for progression are there?	<p>This qualification is part of the Digital Industries Apprenticeship programme and are not offered as standalone products.</p> <p>On achieving this qualification the learner will have completed a section of the knowledge element as part of their apprenticeship journey.</p>

Area	Description
Who did we develop the qualification with?	It was developed in collaboration with employers, sector experts and training providers using the Standard as the baseline. The Standards have been created by The Tech Partnership and their Employer Groups for the specific areas. The qualification embodies the required learning for an apprentice to have the opportunity to successfully gain the relevant knowledge for their chosen career path in a Digital Technology environment.
Is it part of an apprenticeship framework or initiative?	Yes - Digital Marketer (9648-04)

Structure

To achieve the City & Guilds Level 3 Certificate in the Principle of Online and Offline Marketing, learners must achieve:

City & Guilds unit number	Unit title	GLH
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Mandatory units:

Learners must achieve the mandatory unit.

312	The Principles of Online and Offline Marketing	72
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Total Qualification Time (TQT)

Total Qualification Time (TQT) is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected for a learner to demonstrate the achievement of the level of attainment necessary for the award of a qualification.

TQT consists of the following two elements:

- 1) the number of hours that an awarding organisation has assigned to a qualification for guided learning
- 2) an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but, unlike guided learning, not under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Title and level	GLH	TQT
City & Guilds Level 3 Certificate in the Principles of Online and Offline Marketing	72	163

2 Centre requirements

Approval

Fast-track approval

If your centre is approved to offer the existing Digital Apprenticeships at Level 3 or above then you can apply for fast-track approval for the new 9628-12 using the fast-track approval form, available from the City & Guilds website.

Centres should use the fast-track form if:

- there have been no changes to the way the qualifications are delivered
- they meet all of the approval criteria in the fast-track form guidance notes.

Fast-track approval is available for 12 months from the launch of the qualification. After 12 months, centres will have to go through the standard Qualification Approval Process. The centre is responsible for checking that fast-track approval is still current at the time of application.

Please refer to the document **Centre Approval Process: Quality Assurance Standards** for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Resource requirements

Centre staffing

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent or technically knowledgeable in the area(s) for which they are delivering training and/or have experience of providing training (this knowledge must be to the same level as the training being delivered)
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but cannot internally verify their own assessments.

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and quality assurance, and that it takes account of any national or legislative developments.

Quality assurance

Approved centres must have effective quality assurance systems to ensure optimum delivery and assessment of qualifications. Quality assurance includes initial centre approval, qualification approval and the centre's own internal procedures for monitoring quality. Centres are responsible for internal quality assurance and City & Guilds is responsible for external quality assurance. All external quality assurance processes reflect the minimum requirements for verified and moderated assessments, as detailed in the Centre Assessment Standards Scrutiny (CASS), section H2 of Ofqual's General Conditions. For more information on both CASS and City & Guilds Quality Assurance processes visit: the **What is CASS?** and **Quality Assurance Standards** documents on the City & Guilds website.

Standards and rigorous quality assurance are maintained by the use of:

- Internal quality assurance
- City & Guilds external quality assurance.

In order to carry out the quality assurance role, Internal Quality Assurers must

- have appropriate teaching and vocational knowledge and expertise
- have experience in quality management/internal quality assurance
- hold or be working towards an appropriate teaching/training/assessing qualification
- be familiar with the occupation and technical content covered within the qualification.

External quality assurance for the qualification will be provided by City & Guilds EQA process. EQAs are appointed by City & Guilds to approve centres, and to monitor the assessment and internal quality assurance carried out by centres. External quality assurance is carried out to ensure that assessment is valid and reliable, and that there is good assessment practice in centres.

The role of the EQA is to:

- provide advice and support to centre staff
- ensure the quality and consistency of assessments and marking/grading within and between centres by the use of systematic sampling
- provide feedback to centres and to City & Guilds.

Learner entry requirements

City & Guilds does not set entry requirements for this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Age restrictions

City & Guilds cannot accept any registrations for learners under 16 as these qualifications are not approved for learners under 16.

Access arrangements and reasonable adjustments

City & Guilds has considered the design of this qualification and its assessment in order to best support accessibility and inclusion for all learners. We understand however that individuals have diverse learning needs and may require reasonable adjustments to fully participate. Reasonable adjustments, such as additional time or alternative formats, may be provided to accommodate learners with disabilities and support fair access to assessment.

Access arrangements are adjustments that allow candidates with disabilities, special educational needs, and temporary injuries to access the assessment and demonstrate their skills and knowledge without changing the demands of the assessment. These arrangements must be made before assessment takes place.

The Equality Act 2010 requires City & Guilds to make reasonable adjustments where a disabled person would be at a substantial disadvantage in undertaking an assessment.

It is the responsibility of the centre to ensure at the start of a programme of learning that candidates will be able to access the requirements of the qualification.

Please refer to the JQC access arrangements and reasonable adjustments and Access arrangements - when and how applications need to be made to City & Guilds for more information. Both are available on the **City & Guilds website**

3 Delivering the qualification

Initial assessment and induction

An initial assessment of each learner should be made before the start of their programme to identify:

- if the learner has any specific training needs
- support and guidance they may need when working towards their qualification
- any units they have already completed or credit they have accumulated which is relevant to the qualification
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the learner fully understands the requirements of the qualification, their responsibilities as a learner and the responsibilities of the centre. This information can be recorded on a learning contract.

Inclusion and diversity

City & Guilds is committed to improving inclusion and diversity within the way we work and how we deliver our purpose which is to help people and organisations develop the skills they need for growth.

More information and guidance to support centres in supporting inclusion and diversity through the delivery of City & Guilds qualifications can be found here:

[Inclusion and diversity | City & Guilds \(cityandguilds.com\)](#)

Sustainability

City & Guilds are committed to net zero. Our ambition is to reduce our carbon emissions by at least 50% before 2030 and develop environmentally responsible operations to achieve net zero by 2040 or sooner if we can. City & Guilds is committed to supporting qualifications that support our customers to consider sustainability and their environmental footprint.

More information and guidance to support centres in developing sustainable practices through the delivery of City & Guilds qualifications can be found here:

[Our Pathway to Net Zero | City & Guilds \(cityandguilds.com\)](#)

Centres should consider their own carbon footprint when delivering this qualification and consider reasonable and practical ways of delivering this qualification with sustainability in mind. This could include:

- reviewing purchasing and procurement processes (such as buying in bulk to reduce the amount of travel time and energy, considering and investing in the use of components that can be reused, instead of the use of disposable or single use consumables)
- reusing components wherever possible

- waste procedures (ensuring that waste is minimised, recycling of components is in place wherever possible)
- minimising water use and considering options for reuse/salvage as part of plumbing activities wherever possible.

Support materials

The following resources are available for this qualification:

Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems, including our own, Learning Assistant, an easy-to-use and secure online tool to support and evidence learners' progress towards achieving qualifications. Further details are available at: www.cityandguilds.com/eportfolios.

City & Guilds has developed a set of Recording forms including examples of completed forms, for new and existing centres to use as appropriate. Recording forms are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre. Amendable (MS Word) versions of the forms are available on the City & Guilds website.

4 Assessment

Assessment of the qualification

Candidates must:

- successfully complete one evolve test for the unit

Assessment types			
Unit	Title	Assessment method	Where to obtain assessment materials
312	Principles of Online and Offline Marketing	EvolveTest	www.cityandguilds.com

Assessment strategy

City & Guilds has written the following assessment to use with this qualification:

- live assignments that can be downloaded from the City & Guilds website
- sample assignments that can be downloaded from the City & Guilds website.

Time constraints

The following must be applied to the assessment of this qualification:

Qualification registration is valid for 3 years.

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification.

RPL is not allowed for this qualification.

Test specifications

The way the knowledge is covered by the Evolve test is laid out in the table below:

Permitted materials: No there are no permitted materials

Graded: Pass/Fail

Pass mark: 24/35 68%

Test:	Duration: 1 hour 15 minutes		
Unit	Outcome	Number of questions	Marks
312	Topic:1.1: Explore the philosophies of the seven different principles of marketing (7Ps)	2	2
	Topic 2.1: The structure of a typical team, common roles and a hierarchal approach/ Wider business functions	1	4
	Topic 2.2: Shared Objectives / Collaboration practices and tools.		
	Topic 2.3: Principle methods and behaviours in influencing others	3	
	Topic 3.1: Stages of the customer lifecycle Key pinch points in the life cycle journey	4	6
	Topic 3.2: Different channels to engage different customers and different market segments	2	
	Topic 4.1: The components of a marketing campaign	4	15
	Topic 4.2: Segmentation of customers to facilitate customer relationship marketing/customer categorisation	2	
	Topic 4.3: Types of customer relationship marketing/ Benefits of customer relationship marketing/ Limitations, risks and constraints of customer relationship marketing	6	
Topic 4.4: Matching audience engagement to appropriate channels and messaging	3		

Topic 5.1: The legal, regulatory and ethical requirements related to the business of selling or marketing	3	8
Topic 5.2: Components of a risk management framework	2	
Topic 5.3: Return on investment (Roi) and measuring the outcome pf a campaign	3	
Total	35	35 marks

5 Units

Structure of the units

These units each have the following:

- City & Guilds reference number
- Title
- Level
- Guided learning hours (GLH)
- Learning outcomes, which are comprised of a number of topics

Guidance for delivery of the unit

This qualification comprises a **unit**. A unit describes what is expected of a competent person in particular aspects of their job.

The **unit** is divided into **learning outcomes** which describe in further detail the skills and knowledge that a candidate should possess.

Each **learning outcome** has Topic (performance and knowledge and understanding) which specify the desired criteria that must be satisfied before an individual can be said to have performed to the agreed standard.

Unit 312

The Principles of Online and Offline Marketing

Level:	3
GLH:	72
Assessment type:	Multiple choice examination
Aim:	<p>In this unit, learners will be able to</p> <ul style="list-style-type: none">• Identify and apply the core principles of marketing theory• Understand the importance of collaboration in delivering successful marketing campaigns• Recognise and apply the different stages of the customer lifecycle• Recognise the benefits, limits, risks and constraints of customer relationship marketing• Understand how digital marketing and social media can form part of an inclusive marketing

What is this unit about

The aim of this unit is to extend learners' knowledge and awareness of the different principles of marketing theory from both an online and offline perspective. Learners will be able to develop a rounded appreciation in both the value and the importance of delivering a blended and successful marketing campaign. Over time the core principles of successful marketing campaigning have been evolutionary, rather than revolutionary.

This unit enables learners to examine key underpinning marketing theory for both online and offline marketing campaigns. Learners need to be able to understand and recognise the importance of working collaboratively to deliver successful marketing campaigns. As marketing campaigns become more complex and individually personalised, learners need to be able to consider and recognise not only the potential benefits but also understand the limitations and risk in taking a particular approach.

Finally, learners need to understand how different components from both digital marketing and social media can be combined with more traditional methods of marketing to form a blended, inclusive and complementary approach.

Learners should consider the following questions as a starting point to this unit: -
How do you utilise the range of marketing channels to target different customer segments?

- How can new technology-led approaches to marketing be utilised to compliment and underpin traditional approaches to marketing?
- What knowledge is required to create a marketing campaign for a specific target segment?
- What are the benefits, limits, risks and constraints of customer relationship marketing?
- How to do digital and social media strategy fit together to achieve shared business?

Scope of content

Learning outcome

The learner will:

LO1 Identify and apply the core principles of marketing theory

Topic:

1.1 Seven principles of marketing (7Ps)

In this learning outcome the learner will gain an appreciation of the underpinning principles of marketing. It is anticipated that the learner will not only understand the concept but also apply them in their own work environment.

Topic 1.1

Explore the philosophies of the seven different principles of marketing (7Ps):

Product

Place

Price

Promotion

Packaging

People

Positioning

Learning outcome

LO2 Understand the importance of collaboration in delivering successful marketing campaigns

Topics

2.1 Team structure

2.2 Shared objectives and collaboration

2.3 Influencing

In this learning outcome the learner will identify the contribution different team members make to the planning of marketing campaigns. They will understand different approaches to fostering collaboration and gaining the input of other team members and the methods to influence the success of a campaign

Topic 2.1

The structure of a typical team, common roles and a hierarchal approach (Owners, Directors, Senior Managers, Middle Managers, First Line Managers, Specialists, Front Line Staff and Trainees/ Juniors)

Wider business functions

- HR, Marketing
- Accounts/Finance
- R&D
- Sales
- Operations
- Production
- Customer Service
- Recruitment

Topic 2.2

Shared Objectives:

- Business objectives, team objectives, personal objectives, project objectives
- Company Vision, Values, Mission Statement

Collaboration practices and tools:

- Team work for the stakeholders
- Best practice
- Shared common goals
- Online collaboration
- Offline collaboration

Topic 2.3

Principle methods and behaviours in influencing others:

- Meredith Belbin's model of team roles
- Leadership
- Organisational behaviour
- Inclusivity
- Negotiation
- Presentation

- Consultation
- Idea generation
- Receiving, encouraging and giving constructive feedback
- Early involvement and participation
- Professional behaviours
- Developing strong relationships
- Positivity
- Confidentiality
- Integrity
- Trust
- Availability of resource

Learning outcome

LO3 Recognise and apply the different stages of the customer lifecycle

Topics:

3.1 Customer lifestyle

3.2 Engagement methodologies

In this learning outcome the learner will identify the stages of the lifecycle and how this applies to their business. They will understand the different pinch points for dropout and methods and channels for engagement. It is important to cover topic 3.2 in relation to the different segments identified in 4.2

Topic 3.1

Stages of a Business to Business (B2B) customer lifecycle:

- Awareness
- Nurturing
- Desire
- Purchase
- Support
- Loyalty
- Advocacy

Key pinch points in the life cycle journey:

- Different drop out points
- Poor point of sale
- Broken links
- Lack of trust
- Lack of suitable returns policy
- No follow up
- Reviews - poor or none
- Payment options
- Hidden costs/ additional hoops

Topic 3.2

Different channels to engage different customers and different market segments:

- Emails
- TV/ Radio
- Paid search / Organic search
- Social Media
- Cold calling
- Online/ Offline
- Third party referrals/ word of mouth/ refer a friend

Learning outcome

LO4 Recognise the benefits, limits, risks and constraints of customer relationship marketing

Topics

4.1 Marketing campaign

4.2 Segmentation

- 4.3 Customer relationship marketing
- 4.4 Appropriate audience engagement

In this learning outcome the learner will understand the opportunities and challenges of using customer relationship marketing.

Topic 4.1

- The components of a marketing campaign:
- Research and Analysis
- Competitor analysis
- SWOT
- PEST
- Marketing Brief
- Audience identification or segmentation
- Different media types
- Value proposition and positioning
- Call to Action
- Mechanisms/ Tools
- Measurement
- Evaluation
- SMART targets/ Return on Investment/ Measures of success

Topic 4.2

Segmentation and reverse segmentation of customers to facilitate customer relationship marketing:

- Age
- Gender
- Demographic
- Interests/ Hobbies
- Income
- Religion or culture
- Lifestyle

Customer categorisation:

- Business 2 Business (B2B)
- Business 2 Consumer (B2C)
- New customers
- Repeat customers
- Sales leads
- Business customer
- Leisure/personal customer

Topic 4.3

Types of customer relationship marketing:

- Basic marketing
- Reactive marketing
- Accountable marketing
- Proactive marketing

- Partnership marketing
- Targeted marketing
- Community management
- Soft Selling- personalisation, rewards and reminders

Benefits of customer relationship marketing:

- Trust building
- Individualistic
- Low cost
- Perception
- Feedback
- Repeat business
- Cross selling opportunities
- Upselling opportunities
- Referrals - word of mouth - trust
- Customer retention

Limitations, risks and constraints of customer relationship marketing:

- SPAM perception
- Timebound
- Personalisation can be time consuming
- Measurement
- Legal compliance
- Data protection

Topic 4.4

Matching audience engagement to appropriate channels and messaging:

- Appropriate channels and platforms matched to target audience
- Targeted Search Engine Optimisation (SEO)
- Email marketing campaigns
- Web site
- Biogs/ Thought Leadership/ Rich content
- Visual applications (Infographics) vs text based content (Biogs)
- Multimedia content
- Accessibility of content
- Legalities of advertising or promoting certain products
- Demographics of different applications, channels and platform

Learning outcome

LO5 Understand how digital marketing and social media can form part of an inclusive marketing strategy

Topics

5.1 Legal, regulatory and ethical marketing

5.2 Risk management

5.3 Return in investment (ROI) and measuring the outcome of a campaign

In this learning outcome the learner will gain an awareness that there are a number of key acts and codes relating to marketing and doing business online. It is not expected that the learner will know the content of the acts but rather an awareness of the areas they govern. Learners are expected to cover risk management and return on investment for a number of business models and explore the traditional and emerging business types.

Topic 5.1

The legal, regulatory and ethical requirements related to the business of selling or marketing:

- Consumer Contracts Regulations (replaced Distance Selling Regulations)
- Copyright Laws and Creative Commons (different licences, attribution, Intellectual Property)
- Equality Act
- Data Protection Act incorporating the General Data Protection Regulation (GDPR)
- Gambling Act
- Sale of Goods Act
- Trades Description Act
- Consumer Protection for Unfair Trading Regulations
- Unsolicited Goods Act
- Charities Act
- ASA Advertising Codes
- British Code of Advertising, Sales Promotion and Direct Marketing.
- OMA Code of Practice

Topic 5.2

Components of a risk management framework:

- Strategies
- Policies and procedures
- Social media policy
- Behaviour in and out of work
- Appropriate use
- Privacy
- Corporate code of practice

Topic 5.3

Return on Investment (Roi) and measuring the outcome of a campaign

- Measuring conversion rates and Click-Through-Rates (CTRs)
- Measuring and evaluating User Experience (UX)
- Customer service - retention, support, queries
- Impact of drop out points/ pinch points
- Open rates/ response rates
- Evaluation, review and analysis of marketing brief
- Measuring ROI of a campaign

Unit 312

The Principles of Online and Offline Marketing

Supporting information

Suggested learning resources

Books

Principles and Practice of Marketing 9th edition

Published by McGraw-Hill Education

ISBN-10: 1526847232x

ISBN-13: 978-1526847232

David Jobber and Fiona Ellis-Chadwick

Websites

CIM <https://www.cim.co.uk>

CIM7Ps <https://www.cim.co.uk/files/7ps.pdf>

Creative commons: <https://creativecommons.org>

Online and distance selling businesses/overview <https://www.gov.uk/online-and-distance-selling-for-businesses/overview>

Appendix 1 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centre document library** on **www.cityandguilds.com** or click on the links below:

Centre Handbook: Quality Assurance Standards

This document is for all approved centres and provides guidance to support their delivery of our qualifications. It includes information on:

- centre quality assurance criteria and monitoring activities
- administration and assessment systems
- centre-facing support teams at City & Guilds/ILM
- centre quality assurance roles and responsibilities.

The Centre Handbook should be used to ensure compliance with the terms and conditions of the centre contract.

Centre Assessment: Quality Assurance Standards

This document sets out the minimum common quality assurance requirements for our regulated and non-regulated qualifications that feature centre-assessed components. Specific guidance will also be included in relevant qualification handbooks and/or assessment documentation.

It incorporates our expectations for centre internal quality assurance and the external quality assurance methods we use to ensure that assessment standards are met and upheld. It also details the range of sanctions that may be put in place when centres do not comply with our requirements or actions that will be taken to align centre marking/assessment to required standards. Additionally, it provides detailed guidance on the secure and valid administration of centre assessments.

Access arrangements: When and how applications need to be made to City & Guilds provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **Centre document library** also contains useful information on such things as:

- conducting examinations
- registering learners
- appeals and malpractice.

Useful contacts

Please visit the **Contact us** section of the City & Guilds website.

City & Guilds

For almost 150 years, we have worked with people, organisations and economies to help them identify and develop the skills they need to thrive. We understand the life-changing link between skills development, social mobility, prosperity and success. Everything we do is focused on developing and delivering high-quality training, qualifications, assessments and credentials that lead to jobs and meet the changing needs of industry.

We partner with our customers to deliver work-based learning programmes that build competency to support better prospects for people, organisations and wider society. We create flexible learning pathways that support lifelong employability because we believe that people deserve the opportunity to (re)train and (re)learn again and again – gaining new skills at every stage of life, regardless of where they start.

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