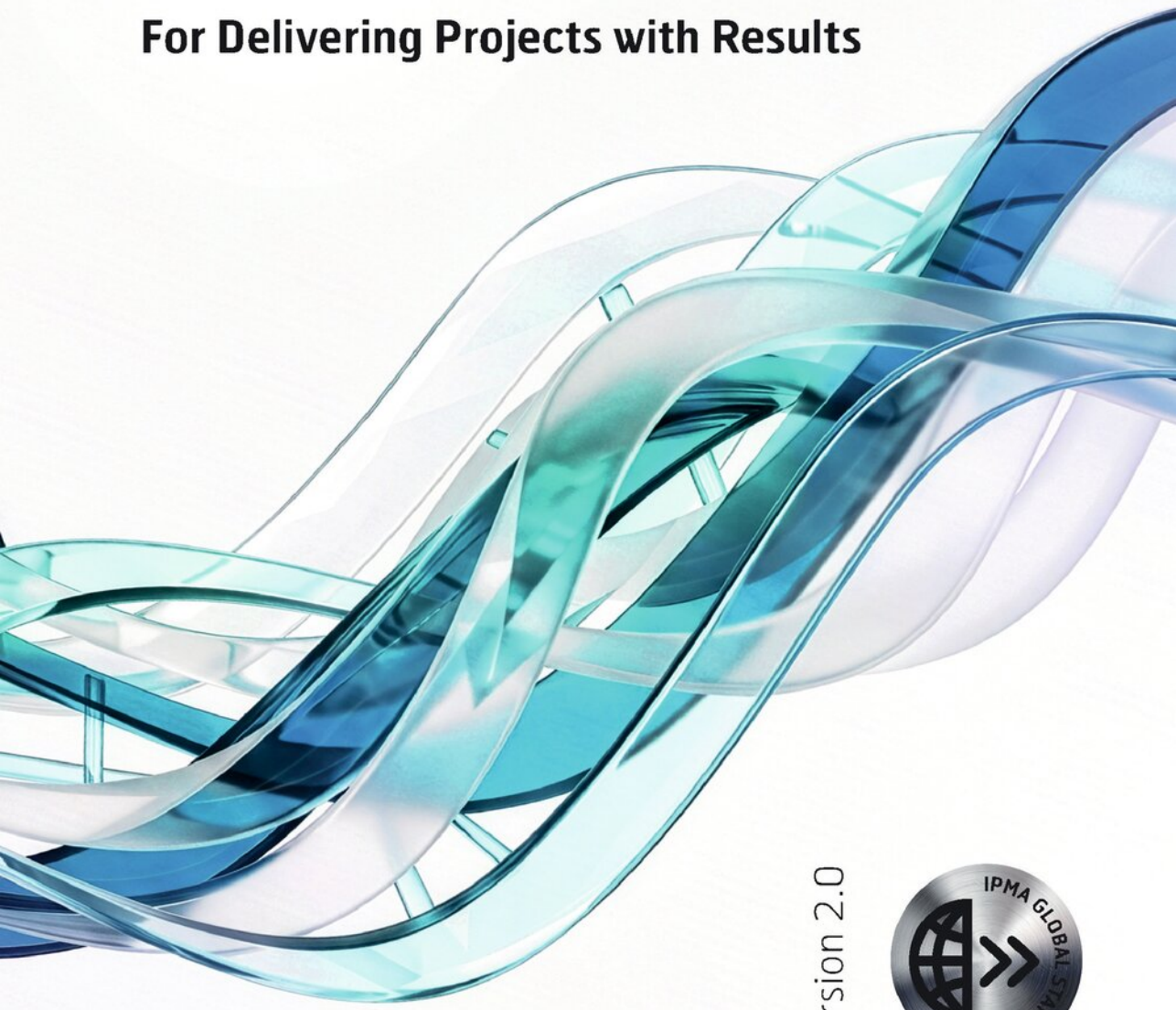
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IPMA

ORGANIZATIONAL COMPETENCE BASELINE

For Delivering Projects with Results



version 2.0

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ORGANIZATIONAL COMPETENCE BASELINE

For Delivering Projects with Results

version 2.0

Title:
ORGANIZATIONAL COMPETENCE BASELINE
For Delivering Projects with Results

Version 2.0

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Publisher: Van Haren Publishing BV, The Netherlands, www.vanharen.net
Layout and DTP: vizual media

ISBN Hard copy: 9789401815161
ISBN eBook: 9789401815178
ISBN ePub: 9789401815185

Edition: First edition, first impression, October 2026
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Foreword by IPMA President

Organizations today operate in an environment shaped by complexity, uncertainty, acceleration, and continuous transformation. Strategic ambitions are increasingly realized through projects, programs, and portfolios that translate intent into innovation, change, resilience, and lasting value. This creates a clear responsibility for senior executives and all those who direct project-related activities. It depends equally on the organizational conditions in which they work, the governance that guides them, the culture that supports them, the resources made available to them, and the competences that enable consistent and responsible delivery.

It is in this context that IPMA is proud to present the **IPMA Organizational Competence Baseline 2.0 (OCB2)**, the global IPMA standard for organizational competence in delivering projects with results.

The IPMA OCB 2.0 marks an important step in the continuing development of organizational project management. Since the first IPMA Organizational Competence Baseline was published in 2013, projects have become more numerous, more important, and more central to the way organizations implement strategy and accomplish change. Projects and project-oriented work represent a substantial part of the global economy, with available research placing project work at approximately one-third of economic activity in advanced economies. This continuing increase in *projectification* has created new demands on organizational structures, governance, culture, leadership, competence, and the relationship between the permanent organization and the temporary structures established to deliver projects and programs.

This standard therefore responds to these demands by defining the competences an organization should have available to govern, manage, support, and deliver projects, programs, and portfolios in line with its strategic ambitions. Results are understood in their broadest sense - not only as project outputs, but also as outcomes, benefits, organizational value, and lasting impact. The standard therefore encourages organizations to look beyond the successful completion of individual initiatives and to consider

whether their overall organizational system enables projects to contribute meaningfully, consistently, and sustainably to strategic success.

At the heart of the standard is the concept of **Organizational Competence for Delivering Projects with Results**. The OCB 2.0 brings together ten interrelated areas of organizational competence, covering strategy; project, program, and portfolio governance; project, program, and portfolio management; management and governance support; results assurance; functional and enabling competences; and organizational alignment. These areas are not intended to operate independently. Together, they form an integrated organizational system through which strategic intent relates to governance decisions, delivery execution, organizational learning, and measurable results.

A central message of the OCB 2.0 is that temporary and permanent organizations must be understood and developed together. Projects and programs are temporary structures created to deliver change, innovation, and transformation. The permanent organization provides continuity, strategic direction, governance, functional expertise, resources, institutional knowledge, and the environment in which the outcomes of projects and programs are ultimately absorbed and sustained. As *projectification* increases, the boundary between these two forms of organization becomes less distinct, making their alignment increasingly important.

Within this relationship, the **Project Management Office (PMO)** has a particularly important role as part of the permanent organization and as an essential organizational capability. It is not simply an administrative function but preserves knowledge, promotes common standards, enables learning, supports governance, and helps to ensure that experience strengthens the organization's ability to deliver future projects. PMOs may operate at different levels and with different mandates. **Strategic PMOs** support organization-wide and portfolio-level governance by strengthening transparency, consistency, prioritization, and alignment with strategic objectives. **Operational PMOs** support the practical application of governance and management practices at project and program levels. Together, they connect senior decision-making with delivery realities.

The OCB 2.0 also has a fundamental role within the **IPMA Delta® Assessment** of project-oriented organizations as the underlying organizational competence baseline. The competences, Key Competence Indicators, measures, and competence classes defined in the OCB establish the reference

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against which an organization's competence for delivering projects with results can be assessed and developed.

The OCB 2.0 remains deliberately non-prescriptive and does not prescribe a single organizational structure, PMO model, governance arrangement, or tools. Organizations differ in purpose, size, sector, strategy, culture, maturity, and operating environment. A PMO in a global project-based enterprise will not necessarily have the same mandate as a PMO in a public administration or an organization undertaking a major transformation.

This edition also reflects the wider responsibilities facing contemporary organizations. Sustainability, adaptability, agility, resilience, and digital capability are not treated as isolated project-level topics. The OCB 2.0 therefore encourages leaders to view organizational competence as a dynamic capability.

The IPMA OCB 2.0 forms an essential part of the wider **IPMA Standards Framework**. Together with the Individual Competence Baseline, the Project Excellence Baseline, and the Research Excellence Baseline, it connects competent individuals, excellent projects and programs, capable organizations, and the continuous advancement of professional knowledge. Each standard has a distinct purpose, but their greatest value is realized when they are applied together to turn strategy into results, create sustainable value, and generate lasting positive impact.

Organizational competence is ultimately a leadership responsibility. It concerns priorities, governance, structures, accountability, investment, assurance, benefits realization, culture, and learning. Therefore, I invite executives, governance bodies, portfolio leaders, PMO leaders, program directors, project professionals, consultants, assessors, educators, and researchers to actively use this standard. Use it as the foundation for organizational reflection and development, as the baseline for preparing for an **IPMA Delta® Assessment**, and as a means of strengthening the strategic role of the **PMO** within the permanent organization. Use it to assess your organization honestly, improve the connection between strategy and delivery, and create an environment in which people can perform, projects can succeed, and intended results can be achieved sustainably.

A standard of this significance can only be created through collective effort. On behalf of IPMA, I extend my sincere gratitude to our **Member Associations** and to the practitioners, executives, researchers, assessors, educators, and other experts they nominated and supported throughout its development. My

special appreciation goes to **A/Prof. Dr. Reinhard Wagner, Project Lead**, for his vision, leadership, perseverance, and commitment throughout this demanding undertaking. I also thank the members of the **core team and review team with Peter Pürckhauer**, the IPMA coordination colleagues, and everyone who supported the drafting, consultation, and review process. I offer my deep appreciation to **Mary Koutintcheva, Vice President for Standards and Qualification and sponsor of the project**, for her vision, confidence, and constant support.

To our Member Associations, Reinhard, the core and review teams, Mary, and every person who contributed to this journey: this standard is a testament to your professionalism, collaboration, and commitment to strengthening organizations through projects. On behalf of the entire IPMA community, you have our heartfelt thanks.



Prof. Dr. Mladen Vukomanović
President, International Project Management Association (IPMA)

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IPMA Standards Framework

Purpose of the Framework

Professional project management continues to evolve in response to changing organizational needs, growing complexity, technological advancement, and evolving societal expectations. Organizations increasingly rely on projects, programs, and portfolios to implement strategy, enable transformation, realize benefits, and create sustainable value. At the same time, expectations of project professionals and organizations have expanded beyond successful project delivery to include responsible leadership, organizational excellence, evidence-informed practice, and lasting positive impact.

These developments demonstrate that no single perspective can fully describe the project management profession. Sustainable success is achieved through the interaction of individual competence, project excellence, organizational capability, and the continuous advancement of professional knowledge through research.

For this reason, IPMA has developed the **IPMA Standards Framework** as an integrated system comprising four complementary baseline standards. Their relationship is illustrated through **the House of IPMA Standards** (Figure 1), which visually represents the framework and demonstrates how the standards operate as an integrated system to support sustainable value creation.

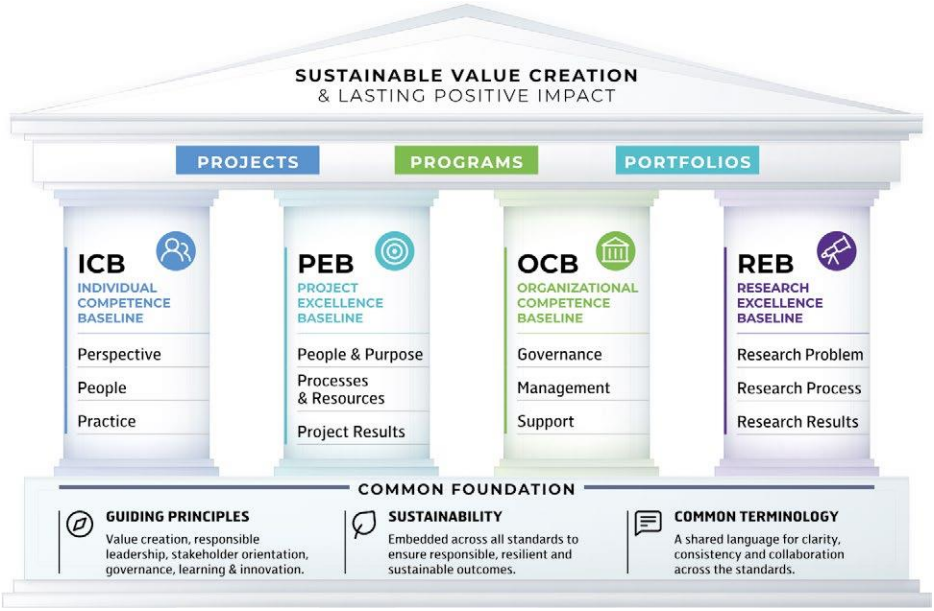


Figure 1: The House of IPMA Standards

The four baseline standards share a common foundation of guiding principles, harmonized terminology, sustainability, ethical behavior, stakeholder orientation, effective governance, and continuous learning. This common foundation ensures consistency across the framework while allowing each baseline to address a distinct perspective of professional project management.

The **IPMA Standards Framework** comprises four complementary baseline standards:

- **IPMA ICB** defines the competences required by individuals to successfully lead and contribute to projects, programs, and portfolios.
- **IPMA PEB** defines the characteristics of project and program excellence and provides a framework for assessing, recognizing, and continuously improving project performance.
- **IPMA OCB** defines the organizational capabilities required to consistently enable projects, programs, and portfolios to deliver intended results and contribute to strategic objectives.
- **IPMA REB** defines the criteria and approach for evaluating research excellence and provides a framework for assessing research quality, impact, and contribution to the advancement of the profession.

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Together, these complementary baseline standards provide an integrated framework for developing competent individuals, achieving project excellence, strengthening organizational capability, and advancing professional knowledge through research. They support organizations and professionals in delivering projects, programs, and portfolios that achieve intended results, contribute to strategic objectives, create sustainable value, and generate lasting positive impact.

Although each standard serves a distinct purpose and may be applied independently, their greatest value is realized when they are applied together.

Relationship between the Standards

The **IPMA Standards Framework** recognizes that sustainable value is created through the combined contribution of competent individuals, excellent projects and programs, capable organizations, and the continuous advancement of professional knowledge.

Projects, programs, and portfolios are the primary mechanisms through which organizations implement strategy, enable transformation, and achieve intended results. This is realized through a progression in which **deliverables** become **outputs**, outputs enable **outcomes**, outcomes generate **benefits**, benefits create organizational **value**, and value delivers lasting organizational and societal **impact** (Figure 2).

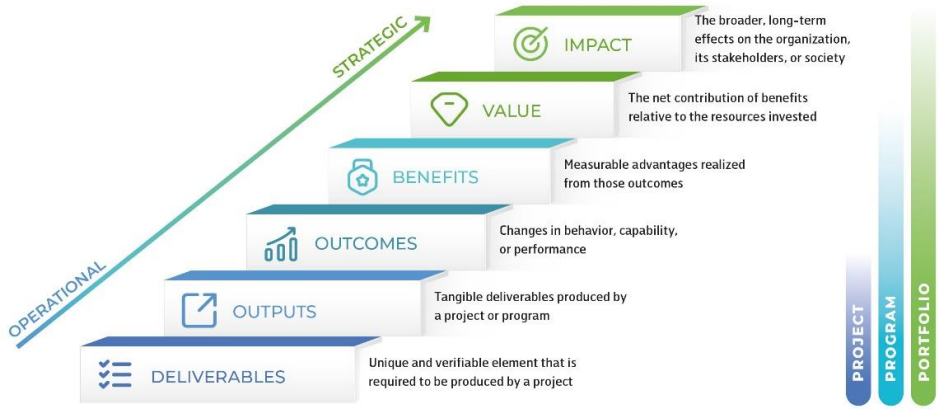


Figure 2: The IPMA Results Amplifier

Achieving all these results is a continuous and interconnected process. Competent individuals lead and contribute to successful projects and programs within organizations that provide the governance, leadership, culture, and support required for consistent delivery and the delivery of intended outcomes. Experience gained from practice strengthens organizational capability, while research continuously advances professional practice, education, and the future evolution of the framework.

These interactions create a continuous improvement cycle in which professional practice, organizational capability, and research reinforce one another, enabling organizations to continuously enhance the results created through projects, programs, and portfolios.

Common Foundation

Although each standard has a distinct purpose and intended users, they share a common conceptual foundation that establishes the principles, concepts, and terminology supporting the consistent interpretation and application of all baseline standards.

Guiding Principles

The IPMA Standards Framework is supported by a common set of guiding principles that underpin all baseline standards.

Collectively, the guiding principles promote:

- turning strategy into results;
- stakeholder orientation, collaboration, and ethical behavior;
- effective governance, accountability, and transparency; and
- sustainability and responsible leadership;
- continuous learning, research, innovation, adaptability, and improvement.

These principles should be applied according to the organization's context, objectives, governance environment, and the complexity of its projects, programs, and portfolios.

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Sustainability Principle

Sustainability is a fundamental consideration across the IPMA Standards Framework. Sustainable project management integrates environmental, social, governance (ESG) and economic considerations into governance, leadership, decision-making, project delivery, and organizational development.

The framework recognizes two complementary perspectives.

- **Sustainability of the project** focuses on ensuring that projects are governed and delivered responsibly, ethically, and with appropriate consideration of resources and ESG factors throughout the project life cycle.
- **Sustainability by the project** focuses on the lasting impact created through the project's outcomes, benefits, capabilities, and value delivered to organizations, stakeholders, society, and the environment.

Sustainability also requires sustainable leaders. Sustainable leadership integrates sustainability into organizational strategy, governance, culture, and project delivery. It promotes innovation, stakeholder engagement, and responsible decision-making in support of sustainable development.

Further guidance is provided in the IPMA Guide on Sustainable Project Management.

Common Terminology

Consistency across the IPMA Standards Framework is supported through the **IPMA Common Glossary**, which provides harmonized definitions of the terminology used throughout the standards. The glossary establishes a common language for practitioners, organizations, educators, researchers, assessors, certification bodies, and other stakeholders, enabling consistent interpretation and application of the standards across industries, sectors, cultures, and professional contexts.

Continuous Development of the Framework

The IPMA Standards Framework provides a stable international baseline for professional project management while recognizing that organizations, projects, and professional practice continue to evolve.

The standards focus on enduring competences, excellence characteristics, organizational capabilities, and guiding principles that remain relevant across industries, organizational contexts, cultures, and delivery approaches, while allowing the framework to evolve in response to significant developments in practice, research, technology, and society.

The framework is continuously informed by collaboration among practitioners, organizations, researchers, educators, Member Associations, certification bodies, and other stakeholders. This collaborative approach ensures that future editions continue to reflect internationally recognized good practice while responding to the evolving needs of the profession.

Future editions may incorporate developments arising from research, professional practice, organizational experience, and emerging technologies. Complementary publications, including Practice Guides, Reference Guides, implementation guidance, assessment guidance, and other supporting materials, provide practical guidance while remaining fully aligned with the baseline standards.



Mary Koutintcheva
Vice President for Standards and Qualification

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Abbreviations and Acronyms

AI	Artificial Intelligence
BSC	Balanced Scorecard
CB	Certification Body
DIV	Derived Investment Value
DoA	Delegation of Authorities
EPCM	Engineering, Procurement, and Construction Management
ERP	Enterprise Resource Planning
ESG	Environmental, Social, Governance
HR	Human Resources
IPD	Integrated Project Delivery
IPMA	International Project Management Association
IPMA ICB	IPMA Individual Competence Baseline
IPMA OCB	IPMA Organizational Competence Baseline
IPMA PEB	IPMA Project Excellence Baseline
ISO	International Organization for Standardization
IT	Information Technology
KCI	Key Competence Indicator
KPI	Key Performance Indicator
M&A	Mergers & Acquisitions
OCPR	Organizational Competence for delivering Projects with Results
OKR	Objectives & Key Results
P3G	Project, Program, and Portfolio Governance
P3M	Project, Program, and Portfolio Management

P3M&G	Portfolio, Program, Project Management & Governance
P3O	Project, Program, and Portfolio Offices
PBO	Project-based Organization
PM	Project Management
PMO	Project Management Office
POO	Project-oriented Organization
PPP	Projects, Programs, and Portfolios
PR	Public Relations
PSO	Project-Supported Organization
RASIC	Responsibility, Accountability, Support, Information, and Consulting
RBV	Resource-based View
REB	Research Evaluation Baseline
R&D	Research & Development
SMART	Specific, Measurable, Attainable, Realistic, and Time-bound
VUCA	Volatility, Uncertainty, Complexity, and Ambiguity

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1. Introduction

In response to growing complexity, uncertainty, acceleration, and transformation, organizations increasingly rely on projects to implement change, deliver strategic results, and remain adaptable. Over the past 20 years, this development has become increasingly evident and has further accelerated the *projectification* of organizations, which means that projects become more numerous, more important, and more central to how organizations operate, which in turn creates further transformation needs in structures, governance, culture, and competences.

For this reason, the IPMA published the first edition of its IPMA Organizational Competence Baseline (IPMA OCB®) in 2013, which complements the other standards, namely the IPMA Individual Competence Baseline (IPMA ICB®) and the IPMA Project Excellence Baseline (IPMA PEB®). All standards are interlinked, as organizations can use the IPMA ICB® to describe, assess, and develop the individual competences required to deliver projects, programs, and portfolios. The IPMA PEB®, on the other hand, is used as a guideline for projects and programs to describe, assess, and improve their implementation. The IPMA OCB® goes even further and outlines the competences an organization should have available to deliver projects, programs, and portfolios in line with both strategic ambitions and the associated results. In the IPMA OCB®, results are understood in a broad sense as an umbrella term for everything that emerges from a project, i.e., outputs, outcomes, benefits, value, and impact.

What makes the IPMA OCB® unique is that it describes the competences necessary for an organization seeking to implement projects effectively, placing less emphasis on methods and tools and focusing instead on implementing strategic objectives and achieving results. The focus of organizational competence in delivering projects with results is on aligning the governance, management, and support of projects, programs, and portfolios with the strategic direction and expected results. When delivering projects, enabling and functional competences contribute to their success.

The specific design of organizational competence varies depending on the characteristics, complexities, and requirements of the projects, the embedding organization, and its strategy, structure, and culture, among other relevant factors. Therefore, there is no one-size-fits-all design approach; instead, the appropriate approach must be tailored to the specific circumstances.

The IPMA OCB® sets out the fundamentals of organizational competence for delivering projects with results, including a detailed list of competences and Key Competence Indicators (KCIs). KCIs specify observable indicators and, together with several measures, are intended to support evidence-based assessment, prioritization of improvement actions, and demonstration of impact. Key definitions relevant to the IPMA OCB are included in this standard; additional definitions are also available in the IPMA Glossary.

The IPMA OCB® is a guide for executives, leaders of project and support functions (e.g. PMO), as well as organizational consultants who want to achieve better project results and improve their organization's overall performance. This can also be based on the results of an independent IPMA Delta® assessment, which leverages the expertise of national and international experts. However, the IPMA OCB® is neither a textbook nor a cookbook. It outlines WHAT should be done. IPMA will provide the HOW through a series of IPMA Practice Guides. Organizations are responsible for tailoring the concepts to their specific needs. The continuous development of organizational competence should be integral to an organization's activities.

Following this introduction, Chapter 2 explains the document's purpose and intended audience. Chapter 3 provides an organizational overview of the project-oriented part of the organization. It begins with the most significant challenges organizations face in managing projects and shows a project-oriented organization in its context. It then explains how an organization can link its mission, vision, and strategic objectives to results. Next, the roles of projects, programs, and portfolios in achieving results are described. Chapter 4 sketches the concept of organizational competence, defines it as the competence for delivering projects with results, and describes each component of this competence along with its KCIs. Chapter 5 focuses on the development of organizational competence for delivering projects with results over time and on the specific actions through which this competence can be enhanced.

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2. Purpose and intended users

The primary purpose of this standard is to outline the organizational competences for delivering projects with results. Ultimately, this enables the successful implementation of the organization's mission, vision, and strategic objectives. Each required competence is described in detail, along with its key competence indicators (KCIs), to enable the organization to continuously improve its competence.

Like all other IPMA standards, such as the IPMA Individual Competence Baseline (IPMA ICB®) and the IPMA Project Excellence Baseline (IPMA PEB®), this standard is generic and intended for use across all types of organizations, projects, and cultures. It is therefore up to the user to decide how the standard should be applied in a specific context and adapted to the needs of a particular organization. The IPMA OCB® provides a framework for the assessment, evaluation, development, and continuous improvement of the organizational competences needed for governing and managing projects, programs, and portfolios. It can also be used for the evaluation, benchmarking, or certification of organizations performing projects, programs, and portfolios. Finally, it can serve as a framework for training, education, and coaching of employees operating in the organizational context.

This standard has identified several typical user groups, which are explained below. However, because of the generic nature of this standard, these groups serve only to illustrate a typical organizational structure. Therefore, no attempt is made to define the role of each group in detail. The list of user groups is not exhaustive. Nevertheless, it provides an informative guide that can be adapted to each organization's context.

Senior executives within an organization can use the standard to better understand the role of projects, programs, and portfolios in achieving their strategic goals. It can help them gain a better understanding of their role within the organization and contribute effectively to assessing and evaluating organizational competence, identifying areas for improvement, and ultimately directing all stakeholders, resources, and activities focused on competence development. Alongside the IPMA PEB® standard for projects,

senior executives can use this standard as a basis for directing internal or external assessment, assurance, benchmarking, certification, and consulting activities.

Executives directing project management activities, such as the head of project management or the head of the PMO, can apply the standard in a similar way to senior executives. Given their direct involvement, they are better placed to understand the requirements for change (e.g. based on assessments) and ensure that organizational competences match the strategic needs of their organization and that the expected results are achieved. The standard is also intended to help executives interact more effectively with their senior executives (e.g. to demonstrate the value of project management) as well as with functional, project, and external staff by developing a common understanding of how projects, programs, and portfolios are executed for the intended results and how all stakeholders can proactively support that performance.

This standard provides a framework for **project, program, and portfolio professionals** to perform their activities. It complements the IPMA ICB®, which defines individual competences for professionals working in projects, programs, and portfolios. Like the IPMA ICB®, the IPMA OCB® guides them in managing projects, programs, and portfolios. The standard helps them understand the concept and their role within organizational competence for delivering projects with results. The standard enables project, program, and portfolio professionals to understand how to implement recommendations for changes to the most relevant and potentially effective elements of organizational competence and to report on their impact. They can use this standard as a basis for proactively improving the delivery of projects, programs, or portfolios.

Internal or external consultants can use the standard to work with senior executives, executives directing project management activities, project, program, and portfolio professionals, and their team members to develop organizational competences for delivering projects with the intended results. Consultants can offer advantages such as specific expertise, independent perspectives, additional capacity, and provide services such as assessment, benchmarking, consulting, facilitating, coaching, training, and continuing professional development.

Human resources (HR) professionals and internal or external educators, trainers, or coaches can use the standard as a basis for developing individual competences tailored to the needs of the organization. Training courses,

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knowledge sharing, individual studies, and other developmental activities should highlight the context of project-related activities within organizations and explain how this should be considered when delivering projects with results. These activities should also emphasize the contribution each individual can make to the continuous development of organizational competence in delivering projects with results.

Certification bodies and their assessors can use the standard as a basis for assessing and evaluating organizations against the competences outlined in the standard and for making recommendations to the organization on how to improve its competence in delivering projects with results.

Researchers can use this standard to support their research projects and conduct practice-oriented research using the results of assessment or benchmarking activities. The standard can also be used in research to extract data and validate changes based on internally generated or externally provided baseline data for trend analysis and continuous improvement, to identify best practices and innovations, and to enable new research activities in the field of project, program, and portfolio management.

3. The organizational view on projects

This chapter describes the organizational view of projects. It addresses the challenges organizations face in managing their projects in today's increasingly complex environment. It then outlines the organizational context for projects. This is followed by an explanation of how an organization's strategic ambitions are turned into results through projects, programs, and portfolios. The chapter defined what Projects, programs, and portfolios are and what their management functions comprise. An example illustrates how projects, programs, and portfolios may be organized. Finally, an organizational view is provided on selected topics, including sustainability, adaptability, agility, resilience, and digital competence.

3.1. Challenges for organizations in managing projects

Work has always been organized, but perhaps less structured and formally defined. The formalization of coherent work in projects is increasingly accepted as a means of achieving results more effectively. Many organizations are engaged in a growing number of projects in areas such as infrastructure development, IT, transformation and organizational change, research and development, product development, and marketing. Organizational competence often needs to evolve due to strategic transformation, not only to a growing project volume. Internationalization, more complex deliveries, and entering new markets or product areas can change project requirements, cause uncertainties, create competitive conditions for the organization, and therefore require new project management competences and organizational practices. To meet these and other complex and dynamic challenges, organizations should focus on project-related competences and develop them sustainably. However, it is not enough to have highly motivated and competent employees. Today's challenges require organizations to take a systematic approach to deliver projects with results.

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With the more intensive use of projects, programs, and portfolios, the demands on organizations in dealing with complexity are increasing. On the one hand, the increasing complexity can be attributed to the technologies, products, and content of the projects, which must be integrated and aligned with the overall objectives. On the other hand, the large number of internal and external stakeholders involved also creates complexity, necessitating professional stakeholder management, flexible communication strategies, information structures, and optimized interfaces. This is particularly important for internationally distributed organizations or project teams that often collaborate virtually. These require considerable effort and resources, and cultural sensitivities and differences must be considered. Finally, many political, regulatory, and legislative aspects must now be taken into account in project work, which certainly adds complexity and requires corresponding competences.

The increasing number and importance of projects and programs require organizations to undergo a transformation in which more consideration is given to the project organization and its temporary and permanent parts are better aligned. There is a growing need for dedicated organizational functions, such as project management offices (PMOs), to manage, govern, support, and develop projects and project-related competences across the organization. Portfolios encompass projects, programs, and sometimes even sub-portfolios, helping executive management align project activities with the organization's strategy and ensure achievement of results. There is also a need for a variety of enablers and functional competences to deliver projects successfully.

In an increasingly competitive environment, the project-oriented part of the organization must also address what added value it provides in the short, medium, and long-term for the organization, its strategy, and the many internal and external stakeholders with their diverse expectations. It is no longer enough to deliver the desired deliverables on time, on budget, and to specification with the projects. Instead, the question arises whether investment in project management is truly worthwhile, whether the desired benefits are achieved, and whether the projects and programs have the agreed-upon impact in the long-term. These are essential questions that the responsible executives must answer.

Sustainable development is becoming increasingly important for organizations operating in today's society. ISO 26000 defines sustainability as '*integrating the goals of a high quality of life, health and prosperity with social justice and maintaining the earth's capacity to support life in all its*

diversity.' These social, economic, and environmental objectives are interdependent and mutually reinforcing. Therefore, organizations should aim to reduce or eliminate negative impacts on society and the environment and to enhance positive impacts, while considering the interests of stakeholders. This also applies to the part of the organization that is responsible for implementing projects. Not only do projects contribute to sustainability through their results, but they should also be implemented sustainably. The IPMA has taken this into account with its '*IPMA Guide on Sustainable Project Management*' and several other publications.

Resource scarcity is driving many organizations to recognize the need to plan, deploy, and manage scarce resources across projects, programs, and portfolios, including finances, workforce, knowledge, facilities, materials, and equipment. Planning and controlling resources require a multi-project perspective (e.g. at the portfolio level) to ensure that the right projects are done right. In a competitive world, companies must constantly strive for better performance, maximize opportunities, and minimize risks. In many sectors, this is particularly true for the management of scarce resources.

Constant changes in society, the economy, political affairs, and technology require an organization to continuously review its organizational structure and adapt it as needed. In doing so, senior executives should maintain a balance between stability and flexibility, encourage their employees to be innovative and adapt their working methods, while simultaneously building upon past experiences, standards, and regulations. That is why change and transformation are permanent requirements for executives and employees of an organization, especially for those responsible for delivering projects. As in nature, an organization must evolve, using all its wisdom and knowledge to survive and grow.

Another challenge for organizations is meeting the expectations of their stakeholders. Customers demand high-quality results in a short time at competitive prices. Employees want to develop professionally through projects and expect an attractive workplace. Suppliers and partners expect an organization to build mutually beneficial relationships and cooperate on an equitable basis. The human factor plays an important role in the delivery of projects. Aspects such as leadership, motivation, trust, and relationship management are particularly important. Given the multifaceted nature of relationships within projects, it is important to take into account the diversity of the people involved and all their different perspectives. That is why interpersonal skills are important not only for individuals, whether they are

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project managers, team members, or executives at all levels, but also for the relationship between an organization and all associated people.

These challenges vary from organization to organization. That is why organizations should continuously identify relevant trends and align their strategies, processes, structures, cultures, and competences accordingly. While simple solutions may be easy to apply, they reach their limits in a complex world. To be successful in this environment, an organization's leadership should adopt tailored approaches that build on a long-term mission, vision, and strategy, respond adaptively to external challenges, and contribute to delivering desired results.

3.2. The organizational context of projects

Organizations are social systems that focus all their activities and the use of required resources to achieve a specific purpose. Organizations can be viewed from different perspectives. One of the most common perspectives is that of organizational structures and processes. However, the organization can also be considered in terms of its people, mindsets, cooperation, and the culture that has evolved. Given the significant change and volatility in the organization's environment, the organization's strategic adaptability, with a dynamic view of thinking and acting, is gaining prominence today. Ultimately, an organization can also be viewed through the lens of its effectiveness. Are the resources used efficiently and sustainably to achieve the desired results? This matters both in times of increasingly scarce resources and with a greater focus on sustainability, as well as for the longevity of the organization.

The term '*organization*' in the IPMA OCB® is a widely understood concept. It can refer to a public administration agency, a for-profit business, a social enterprise, a non-profit organization, or an entity such as a club. The term can refer to an entire organization within its boundaries, or only to a part of it (e.g. the part of an organization dedicated to project delivery). This may also refer to an organization, such as a joint venture or a project network, that involves several organizations. The organization in focus should be clarified before applying the IPMA OCB®.

As the share of work in projects increases due to projectification, temporary organizations develop alongside permanent organizations. These temporary organizations for projects and programs exist only for a limited time and can be structured in various ways. Projects can be organized within a specialist department or as a cross-functional matrix organization. They can be set up

as autonomous organizational units with far-reaching powers and their own resources, or even as separate project entities that exist alongside their '*mother*' organization. Due to the increasing number of projects and thus temporary forms of organization, the differences between permanent and temporary organization are becoming increasingly blurred. Many organizations, for example, have established specialized functional departments responsible for managing projects as a permanent task.

In 2014, John P. Kotter proposed a '*Dual Operating System*', arguing that the conventional organization alone is insufficient to cope with rapid change and that projects play an increasingly important role in enabling adaptability and performance. The permanent ('*conventional*') organization is primarily responsible for handling the ongoing operations as efficiently as possible. This typically requires predictable planning and a hierarchical system that controls the operations in a '*command & control*' manner. Conversely, temporary organizations focus on innovation, change, and transformation achieved through projects and programs. They are designed to be flexible and agile, enabling experts within the organization to self-organize (see Figure 3, a schematic illustration, shown for explanatory purposes only). As the number and importance of projects in organizations increase, there is a shift in organizational logic toward greater use of temporary organizational structures. However, it is crucial to ensure that permanent and temporary organizations are closely aligned. In practice, with only a few exceptions, both types of organizational structures will be necessary. Which side outweighs the other depends on factors such as market demand, strategic goals, operational requirements, and top management decisions.

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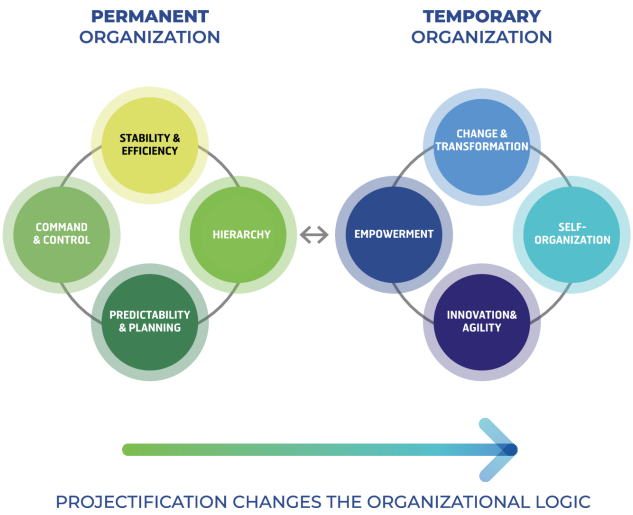


Figure 3: Schematic illustration of the Dual Operating System

When aligning both parts of the organization, it is essential to ensure that the change activities of the projects are coordinated with the routine processes of the permanent organization. For example, the activities of a modernization project in a production facility need to be closely coordinated with the head of production, including the start and expected end dates of the modernization, as well as any intervening steps during ongoing production. On the other hand, know-how and resources of the functional departments are required for delivering the projects. Therefore, they should be carefully managed by project leadership.

The literature (see the Bibliography) contains various terms used to express the extent to which projects are used relative to conventional organizations. However, there are no exact definitions for these terms, which is why they should be used with caution. A Project-Based Organization (PBO) is one that primarily operates through projects. In contrast, a '*Project-Supported Organization (PSO)*' undertakes only a few projects and leverages its capabilities to effect change within the functional organization. In practice, most organizations use projects as a strategic approach to systematically translate goals into results, with functional departments continuing to play an important role. This is referred to as a project-oriented organization (POO). The POO leverages the expertise and resources of the functional departments and collaborates closely with them.

Organizations often use project portfolio management to ensure alignment between both parts of the system. A primary goal is to ensure that both

permanent and temporary organizational units align with strategic objectives and do not pursue their own particular interests. Project portfolio management also helps manage the use of scarce resources continuously and supports senior executives in decision-making and other governance functions.

Each organization can be defined from both internal and external perspectives (see Figure 4). The external context of an organization may include, but is not limited to, customers, regulators, partners, science and technology, the economy, legislation, society, and the natural environment. The internal context includes all permanent and temporary organizational units. Permanent units include top management structures and functional departments.

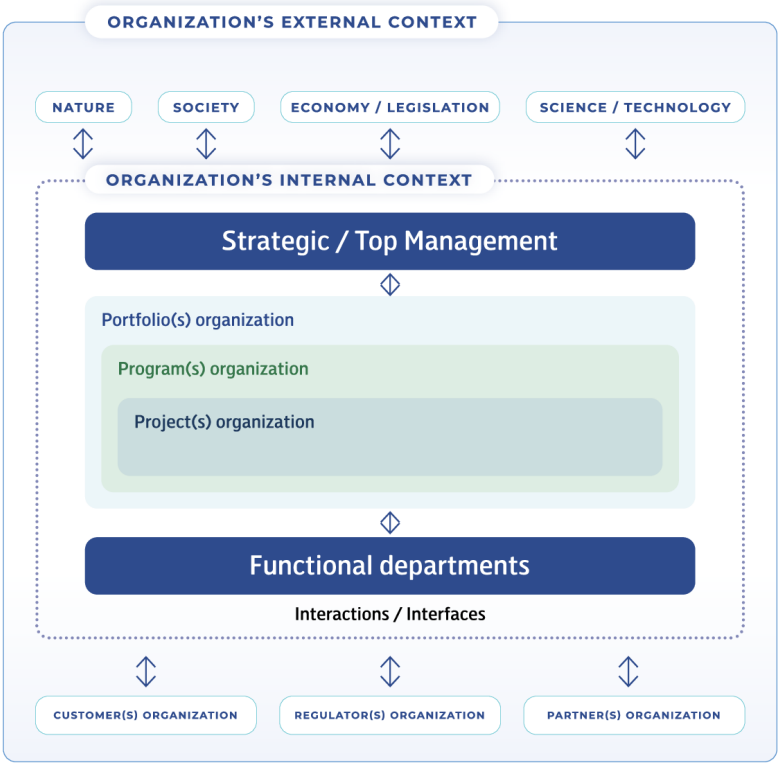


Figure 4: A project-oriented organization in its context

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3.3. Turning strategic ambition into results

Organizations exist to serve a specific purpose, achieved through a range of activities aimed at particular objectives. Most organizations describe their intentions as a **purpose, mission, vision, and strategy**, which together form a coherent framework explaining why they exist, what they seek to achieve, and how they intend to do so. The **purpose** defines the organization's fundamental reason for being, and its enduring contribution to stakeholders and society beyond financial or operational goals. The **mission** translates this purpose into a clear statement of what the organization does, for whom, and to what end in the present, providing direction and guardrails for the daily activities and decisions. The **vision** articulates a compelling picture of the desired future state that the organization aspires to create, serving as a long-term ambition that inspires and aligns stakeholders. The **strategy** then outlines the deliberate choices and priorities the organization makes to move from its current position toward its vision, including where it will compete, how it will differentiate itself, and how resources will be allocated to achieve lasting success. The strategy is usually decomposed into several objectives, to which all activities should contribute. **Values** complement the purpose, mission, vision, and strategy by defining the principles and standards that guide behavior across the organization. They express what the organization stands for in terms of ethics, culture, and decision-making, guiding how people interact with one another, with customers, and with external partners. When consistently lived rather than merely stated, values provide a shared moral and cultural compass that influences leadership conduct, employee engagement, and the credibility of the organization's actions in pursuit of its strategy.

Developing this strategic framework for the organization is an intensive process. Top management should engage key personnel and stakeholders in such a process, including the executives responsible for project management (offices). The process usually starts with a strategic analysis of the present situation and of past and future developments in the organization's context, using scenario techniques or other methods. Next, the organization's position and those of all relevant competitors are analyzed and compared, considering current strengths and weaknesses, as well as future opportunities and threats relative to competitors.

Strategy development can be done in various ways: top-down and/or bottom-up. At the end of this process, it should be transparent to all stakeholders how the organization intends to achieve its purpose and vision

within the guardrails of explicitly formulated mission and values and the strategies that guide day-to-day activities (see Figure 5).

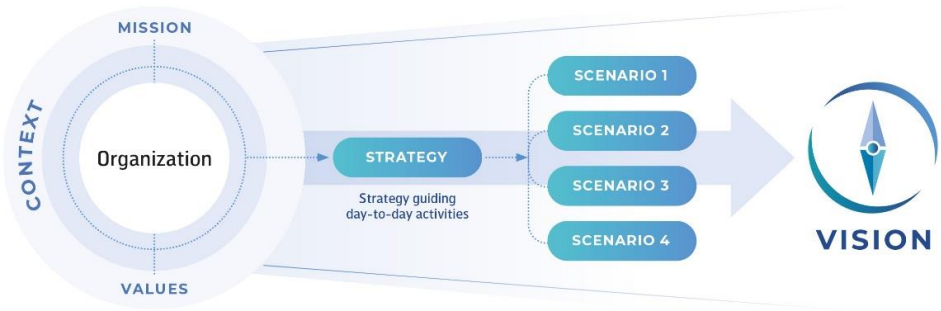


Figure 5: Strategies guiding day-to-day activities

To ensure that the organization's day-to-day activities align with its strategy, a strategic planning process formulates short-, medium-, and long-term objectives, taking into account available resources and capabilities. Since projects and programs are vital means of implementing strategies, they must align with the strategic plan and its objectives. As a means of alignment, a Balanced Scorecard (BSC) can be used to 'translate' strategic goals into the project perspective. The goals are specified with target values and a number of **Key Performance Indicators** (KPIs) to guide the implementation of appropriate measures. The same approach can be used to monitor and control strategy implementation in projects and to report performance against the defined KPIs (see Figure 6).

Another method is **Objectives and Key Results (OKRs)**, a goal-setting and alignment framework that helps organizations translate strategic ambitions into focused, measurable progress delivered through projects, programs, and other activities. **Objectives** describe what the organization wants to achieve and why it matters. They are qualitative, ambitious, and directional statements that provide inspiration and focus, rather than detailed SMART targets. **Key Results** define how progress toward an objective will be assessed. They consist of a small set of quantitative, outcome-oriented measures that indicate whether meaningful progress has been achieved. OKRs complement, but do not replace, established management instruments such as KPIs and the Balanced Scorecard. They add a more dynamic and adaptive layer by focusing attention on a limited number of ambitious priorities, enabling regular review, learning, and adjustment.

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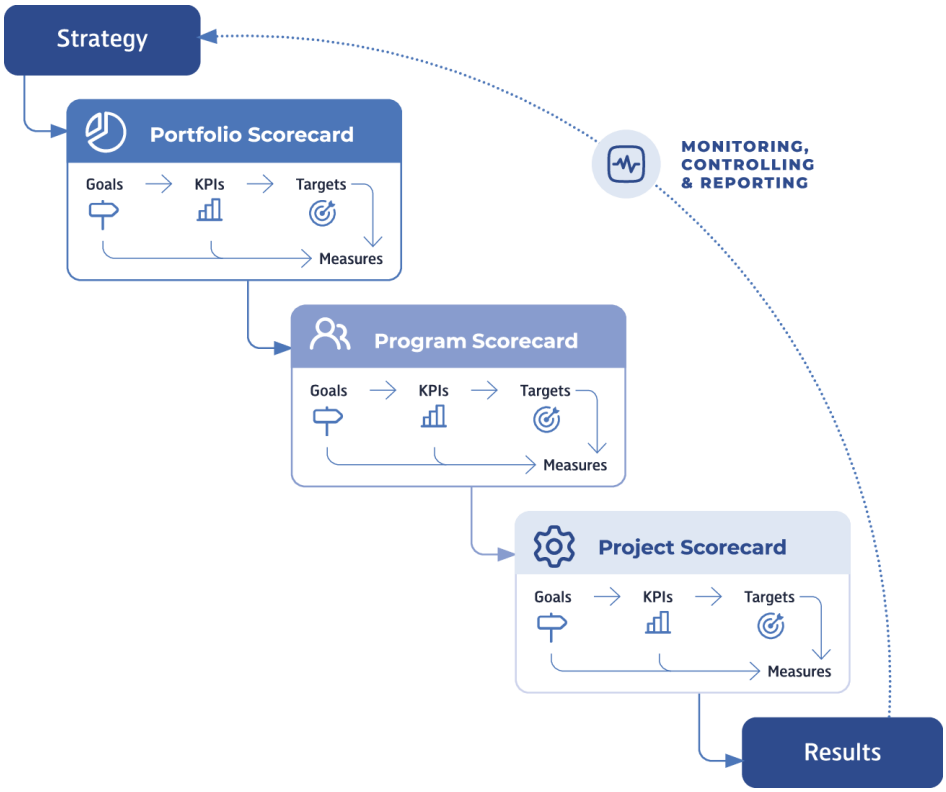


Figure 6: Linking projects with strategy using the BSC

Projects and programs aim to deliver the intended results. Based on traditional beliefs, emphasis was placed on ensuring that project **deliverables** or results were achieved within a limited time and budget and in accordance with the requirements set out in the specifications. This is commonly referred to as **project management success**. However, this is a narrow view of results, which are now seen more strategically (see Figure 7).

In the context of projects and programs, **outputs, outcomes, benefits, value, and impact** form a results chain that turns strategic ambition into results through projects. Outputs are the tangible deliverables produced by a project or program (such as implementing a new application for virtual collaboration) and are directly controllable through scope, schedule, cost, and quality management. **Outcomes** describe the changes in behavior, capability, or performance (such as employees actively collaborating in Teams, reduced reliance on email, faster information sharing, and more effective virtual meetings) that occur when outputs are used. At the same time, **benefits** are the measurable advantages realized from those outcomes, often expressed in

financial, operational, or strategic terms (such as a 20 percent reduction in internal email volume, shorter decision-making cycles, lower travel costs due to virtual collaboration, or improved cross-functional coordination in the aforementioned example).

Value reflects the net contribution of these benefits relative to the resources invested, considering trade-offs, opportunity costs, and stakeholder priorities (such as increased productivity and efficiency in collaboration, which outweigh the costs of licensing, training, and change management). **Impact** captures the broader, long-term effects on the organization, its stakeholders, or society. It aligns delivery with purpose and strategic objectives (such as a more agile, connected organizational culture, improved employee engagement, and an enhanced capability to support flexible and hybrid ways of working that align with the organization's strategic objectives). If the project achieves results in all these categories, we can speak of **project success**.

Whether benefits can be achieved during a project's life cycle depends heavily on the project design. With most projects, benefits are typically realized only after completion, i.e., in the post-project or utilization phase. In programs, on the other hand, the life cycle usually extends into the utilization phase to ensure that the benefits materialize. That is why program managers are typically responsible for the benefits realization.

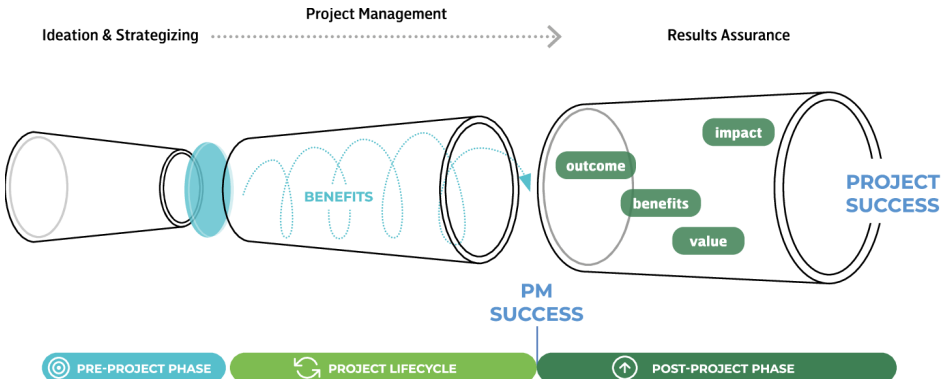


Figure 7: Turning strategy through projects into results

All these results categories are interrelated and can be planned and controlled through practices such as benefits management, including transparent results mapping, benefit ownership, key performance indicators, and ongoing review to ensure that projects and programs remain focused on realizing intended value rather than merely delivering outputs. Another

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practice is a **business case** that quantifies the resources and effort to be invested in a project or program in relation to the expected added value, helping decision-makers determine whether a project or program is worthwhile.

3.4. Projects, programs, and portfolios as a means for achieving results

At IPMA, we define a project as 'a unique, temporary, multidisciplinary and organized endeavor undertaken to realize agreed deliverables and intended outcomes within defined requirements and constraints,' and subsequently, project management as 'the application of methods, tools, techniques and leadership practices to plan, organize, monitor and steer a project in order to realize its agreed deliverables and intended outcomes within defined requirements and constraints.' The ISO 21502:2020 highlights the objectives more generally in its definition for a project as 'a temporary endeavor to achieve one or more defined objectives.' Moreover, project management is described as 'coordinated activities to direct and control the accomplishment of agreed objectives.' Both definitions emphasize that projects must be delivered within the framework of specific objectives and constraints (time, cost, quality, etc.) and that their management ensures they achieve the desired results. What is not mentioned in any of the definitions is that project success depends on outcomes, benefits, value, and impact, which should be considered in the project's mandate, business case, and governance.

IPMA defines programs as 'a temporary organization of interrelated projects and other related activities managed in a coordinated way to enable change and realize benefits in support of a strategic goal.' Building on this definition, program management is defined as 'the coordinated management of interrelated projects and other related activities to enable change and realize benefits in support of a strategic goal.' The ISO 21503:2022 defines a program as 'a group of program components (projects, programs, or other related work) managed in a coordinated way to realize benefits' and program management as 'coordinated activities to direct and control the realization of identified benefits and deliverables.' Both definitions emphasize the realization of benefits, which is why programs tend to be more strategic and long-term in nature and require greater coordination among the interrelated program components.

Finally, a project portfolio is defined according to IPMA as 'a set of projects, programs and other related work brought together to optimize the use of

organizational resources and support the achievement of strategic goals.' Project portfolio management builds on this definition and can be summarized as 'the coordinated prioritization, selection and oversight of projects, programs and other related work to optimize the use of organizational resources and support the achievement of strategic goals.' In the context of projects and programs, one can speak of portfolio management in a simplified sense. However, given that many organizations also have product portfolio management, among other types of portfolio management, it is essential to note that managing a portfolio of projects and programs should be referred to as project portfolio management. Portfolio management is a permanent function that is usually centralized to achieve a better overview of all related activities and to support optimization. It aims to align projects and programs with the organization's strategy by selecting and prioritizing them to achieve strategic goals most effectively and efficiently.

Figure 8 shows how ISO 21500:2021 views the link between an organization's strategic level and the delivery of results by projects, programs, and portfolios. The strategic level defines the objectives that the organization intends to achieve. These are derived from an assessment of the opportunities and threats facing the organization and are described using specific business cases or requirements as the starting point for the projects. The projects, programs, and portfolios help achieve deliverables, outputs, and outcomes, and, in turn, the organization's strategic goals through the benefits.

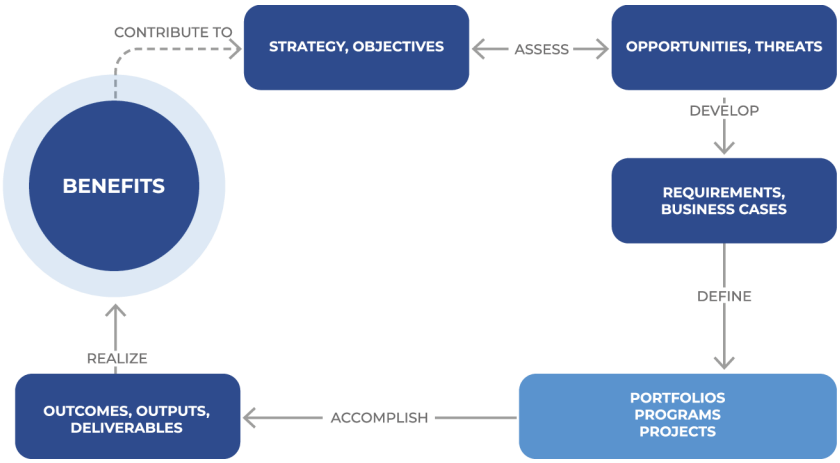


Figure 8: Strategy implementation according to ISO 21500:2021

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Figure 9 shows an example of how projects, programs, and portfolios can be structured within an organization. An automotive supplier can serve as an example to illustrate this, an organization that develops, produces, and delivers high-tech products to its clients, with an extensive portfolio of R&D projects and programs, as shown on the right of Figure 9. One of the programs in this portfolio focuses on coordinating all projects for a key customer, while another program consolidates all projects for a new market in Asia. The other projects serve other customer projects. The sub-portfolio is used to develop innovative technologies that, once ready for series production, are applied to customer projects. On the upper-left side of Figure 9 is another portfolio representing IT projects and programs. This is where all projects within the organization's IT budget are bundled, planned, and managed. In addition to smaller IT projects, such as renewing a software application, there are more complex programs related to upgrading the company's ERP system. A single program is shown in the bottom-left of the figure. As the supplier is in the process of acquiring another company, the program bundles all activities related to the Merger and Acquisition (M&A) process. The other projects listed individually represent smaller internal projects, such as the upcoming trade fair appearance or the cafeteria renovation. All projects must be visible to everyone in the organization. Projects and programs often require the same resources at the same time, which is why management from a relatively central perspective, e.g. through a portfolio, a PMO, or a senior executive, is needed.

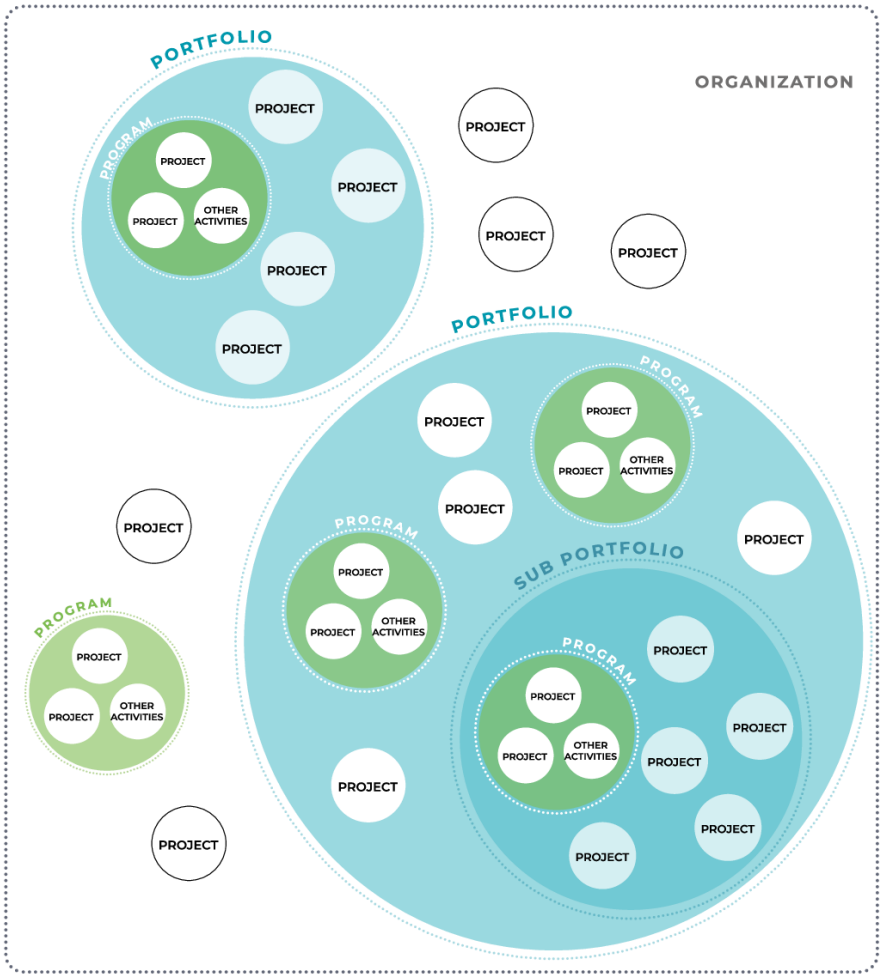


Figure 9: Projects, programs, and portfolios in an organization

3.5. An organizational view on sustainability

Organizations increasingly rely on projects, programs, and portfolios (PPP) to implement strategy, drive change, and deliver results. Thus, the competence for delivering projects with results is inherently linked to sustainability. Sustainability is understood as the capacity of a system to endure and adapt over time, maintaining its essential functions, integrity, and resilience. The organization's leadership bears accountability for shaping the organizational system within which PPP are delivered. This includes setting strategic

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direction, establishing governance, enabling competences, and ensuring that results are realized and sustained beyond formal project closure.

Strategizing for Sustainable Value Creation

At the strategic level, leadership ensures that sustainability is embedded in the organization's purpose, objectives, and strategic choices. Strategy defines not only what the organization intends to achieve but also how results are delivered to satisfy the expectations of stakeholders over time.

Leadership aligns PPP objectives with strategic goals, ensuring that portfolios are composed and prioritized based on their contributions to economic performance, societal benefits, and environmental responsibility. Strategic decision-making is informed by impact and materiality considerations, recognizing that projects and programs influence complex systems beyond immediate organizational boundaries. In accordance with the IPMA OCB®, governance frameworks provide transparency, ethical orientation, and accountability, enabling leadership to balance competing interests and time horizons. Strategy is treated as a dynamic capability. Through regular reviews and feedback from PPP performance and results, leadership adapts strategic intent to emerging risks, opportunities, and stakeholder expectations, thereby strengthening organizational resilience and relevance.

Delivering Projects, Programs, and Portfolios with Integrity

Leadership responsibility continues throughout the delivery of projects, programs, and portfolios. In line with IPMA standards such as the Sustainable Project Management ICB4 Reference Guide, delivery is understood as a socio-technical process in which people, structures, and methods interact to create results. Leadership ensures that sustainability considerations are treated as primary objectives and integrated into mandates, business cases, and definitions of success.

Projects and programs are governed with clear roles, sponsorship, and decision rights, enabling responsible trade-offs between scope, resources, risks, and long-term impact. Portfolio management provides a holistic view, allowing leadership to steer investments toward initiatives that collectively advance strategic objectives. Ethical conduct, stakeholder engagement, and transparency are promoted as essential leadership behaviors throughout the PPP lifecycle.

From an organizational competence perspective, successful delivery is not measured solely by adherence to plans but by the organization's capability to manage complexity, uncertainty, and interdependencies while maintaining alignment with strategic intent.

Assuring and Maintaining Results

Delivering outputs does not guarantee that desired outcomes, benefits, value, or impact will materialize. Leadership, therefore, establishes mechanisms to ensure that PPP results are realized and maintained, and that they contribute to long-term value. In alignment with IPMA's emphasis on results orientation, benefits realization management extends beyond project completion into operational use and lifecycle performance.

Leadership defines clear success criteria, including sustainability-related objectives, and ensures that performance measurement and reporting systems capture both quantitative and qualitative impacts. Post-project and post-program evaluations are used to assess not only immediate results, but also longer-term effects, unintended consequences, and systemic interactions. Assurance activities, including reviews and audits, support learning and accountability rather than control alone. Through these mechanisms, leadership maintains oversight of whether PPP are fulfilling their strategic and societal purpose.

Enabling Organizational Competence

Organizational competence for delivering projects with results is enabled through a coherent set of enablers. Leadership invests deliberately in individual and collective competences, ensuring that people involved in PPP possess not only technical skills, but also contextual, behavioral, and ethical capabilities such as systems thinking, stakeholder engagement, and adaptive leadership. Partners and suppliers are selected and managed based on competence and shared expectations, recognizing that value creation increasingly occurs within extended networks.

Organizational culture plays a critical role: leadership fosters a culture of responsibility, openness, and learning, where reflection and constructive challenge are encouraged. Learning is institutionalized through structured lessons learned, knowledge sharing, and continuous improvement processes. Change and transformation competences are strengthened so that projects and programs can function as effective instruments of organizational and societal change. Leadership acknowledges that sustainability requires

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adaptability and the capacity to evolve in response to complex and changing environments.

Integrating Organizational Functions

Finally, leadership ensures that sustainability through PPP is supported across all organizational functions. Projects and programs do not exist in isolation; their results must be absorbed, operated, and maintained by the permanent organization. Functions such as Marketing and Sales, Product Management, Operations, Human Resources, Finance, Controlling, Purchasing, and Quality each contribute specific capabilities that influence whether PPP results translate into lasting value.

Leadership aligns functional objectives, processes, and performance measures with sustainability-oriented PPP outcomes. This integration ensures coherence between temporary and permanent structures and reinforces organizational competence as a system-level capability rather than a collection of isolated practices.

From a leadership perspective, organizational competence for delivering projects with results is a strategic responsibility. By aligning strategy, governing PPP delivery, assuring results, enabling competences, and integrating organizational functions, leadership ensures that projects, programs, and portfolios become reliable vehicles for sustainable development.

3.6. An organizational view on adaptability, agility, and resilience

Within the IPMA OCB®, organizational competence is defined as the capability to consistently translate strategic intent into results through projects, programs, and portfolios (PPP). In environments characterized by Volatility, Uncertainty, Complexity, and Ambiguity (VUCA), this capability increasingly depends on three interrelated factors: adaptability, agility, and resilience.

From a leadership perspective, these capabilities are not attributes of individual projects or teams, nor are they reducible to the adoption of specific methods or frameworks. They are systemic properties of the organization that emerge from strategy, governance, culture, competences, enablers, and functional integration. Leadership is accountable for deliberately shaping these properties so that the organization can respond to changes and

disruptions, absorb shocks, learn from experience, and continue to create value.

Adaptability enables long-term evolution, agility enables rapid short-term response, and resilience ensures continuity and recovery under stress. Together, they form organizational readiness for change.

Strategic adaptability and resilience

Within the IPMA OCB®, adaptability and resilience are reflected in the organization's capacity to adjust direction while maintaining coherence and identity. Leadership ensures that strategy provides a stable mission and vision, while remaining open to revision when fundamental assumptions are no longer valid. Adaptability manifests in leadership's willingness to revise strategic priorities, business models, and governance structures in response to long-term environmental shifts. Resilience complements this by ensuring that the organization can withstand disruption without losing its strategic orientation. Leadership establishes governance mechanisms that support sensing, seizing, and transforming the organization to anticipate risks, absorb shocks, and recover effectively.

Portfolio management aligns projects, programs, and renewal initiatives with organizational strategy. It enables leadership to prioritize investments, balance stability and change, and direct resources toward initiatives that create lasting organizational value. Leadership uses portfolio governance not only to systematically prioritize initiatives but also to balance exploitation and exploration. Adaptability ensures long-term relevance, while resilience assures continuity of value creation during periods of stress or disruption.

Delivering projects, programs, and portfolios in an agile and resilient way

Agility and resilience determine how effectively PPP respond to uncertainty, dynamics, and disruption. Leadership ensures that governance, decision processes, and delivery approaches enable rapid response without compromising integrity or strategic alignment. At the project and program levels, agility is expressed through iterative planning, short feedback loops, and self-organizing, empowered teams that can rapidly adjust scope, priorities, and solutions. Resilience is expressed through robust yet flexible structures, proactive risk management, and the capability to recover from setbacks without cascading failure. Leadership promotes hybrid, context-

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sensitive approaches, recognizing that uncertainty demands learning-driven delivery rather than rigid control.

At the portfolio level, agility enables rapid reprioritization and reallocation of resources, while resilience ensures that critical initiatives and capabilities are protected during periods of turbulence. Scaling agility from teams to programs and portfolios requires alignment mechanisms that balance autonomy with coherence. Reference frameworks for scaling agility provide guidance, but, in line with the IPMA OCB®, leadership tailors these approaches to an organization's context, overall competence, and risk profile.

As with sustainability, agility and resilience in PPP are not pursued as ends in themselves but as means of maintaining value delivery under changing conditions.

Results and benefits: Adaptive, agile, and resilient value creation

Leadership ensures that adaptability, agility, and resilience translate into meaningful and enduring outcomes. Agility, for example, will improve responsiveness, time-to-value, and stakeholder satisfaction. Adaptability ensures that lessons learned are institutionalized and inform future strategy. Resilience ensures the continuity of operations, protects critical value streams, and enables recovery from disruptions.

Leadership defines success not only by delivery performance, but by the organization's capability to maintain effectiveness under pressure and emerge stronger from change. Reviews and retrospectives assess whether PPP have contributed to improved learning capacity, reduced vulnerability, and enhanced strategic robustness. In this way, resilience reinforces the same long-term results logic as sustainability: safeguarding value over time while enabling continuous renewal.

Competence, culture, learning, and robustness as organizational enablers

Leadership establishes the conditions under which adaptability, agility, and resilience can develop coherently. Individual competences emphasize mindset and behavior, including openness to change, systems thinking, collaboration, stress tolerance, and reflective learning. Leadership development strengthens trust, empowerment, and responsible decision-making in the face of uncertainty.

Organizational culture supports psychological safety, constructive handling of failure, and learning from disruption. Learning is institutionalized through structured reflection, lessons learned, and cross-project knowledge exchange. Change and transformation competences enable the organization to translate learning into structural and behavioral adjustments.

Resilience is further supported by organizational design choices that balance redundancy and efficiency, as well as flexibility and reliability. Clear principles, values, and standards provide orientation in times of uncertainty, while teams retain autonomy in execution. Partnerships and supplier relationships are designed to support continuity and recovery, extending resilience across the organizational ecosystem.

Integrating adaptability, agility, and resilience into organizational functions

Leadership ensures that adaptability, agility, and resilience are integrated into key organizational functions, enabling sustained PPP results. Human Resources (HR), for example, builds adaptive and resilient capability through competence development, leadership pipelines, and performance systems that value learning, collaboration, and well-being. Finance and Controlling support agility and resilience through flexible budgeting, scenario planning, and investment models that balance short-term efficiency with long-term robustness. Operations ensure that agile and adaptive outcomes can be absorbed without compromising reliability or quality. Quality management integrates continuous improvement with resilience-oriented assurance. Purchasing and partner management enable responsiveness and continuity through flexible contracting and collaborative relationships. Marketing, Sales, and Product Management provide rapid feedback from markets and customers, supporting adaptive strategy and agile delivery.

Through functional integration, leadership ensures coherence between temporary PPP structures and permanent organization, reinforcing adaptability, agility, and resilience as system-level competences.

Adaptability, agility, and resilience constitute core organizational capabilities for delivering projects with results. Adaptability enables long-term evolution, agility enables effective short-term response, and resilience ensures continuity and recovery in the face of disruption. Embedded across OCB dimensions, they transform projects, programs, and portfolios into instruments of sustained value creation, learning, and change. From a leadership perspective, cultivating these capabilities ensures that the

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organization can respond to uncertainty without losing direction, recover from disruption without losing momentum, and continuously deliver results that remain relevant in a changing world.

3.7. An organizational view on digital capabilities

Digital technologies have become a decisive factor in how organizations compete, operate, and innovate. From an organizational competence perspective, using digital technologies is not primarily a technical challenge, but a leadership and governance challenge. It concerns the organization's capability to purposefully use digital capabilities, including data analytics, automation, platforms, and various forms of artificial intelligence, to translate strategy into results by delivering projects, programs, and portfolios (PPP).

Digital technologies comprise a broad and evolving set of capabilities. These include information and communication technologies, cloud and platform solutions, data and analytics, automation and robotics, and multiple forms of artificial intelligence, such as rule-based systems, machine learning, natural language processing, computer vision, agentic AI, and generative AI. While technologies differ in maturity and application, their organizational purpose is consistent: to enhance competitiveness, improve efficiency, and enable innovation by augmenting human decision-making, accelerating delivery, and creating new forms of value.

Leadership bears accountability for ensuring that digital technologies are integrated coherently into strategy, governance, and delivery systems. In alignment with the IPMA OCB®, digital capabilities are the organization's capability to purposefully use digital technologies to deliver PPP and achieve sustainable, measurable results.

Framing Digital Technologies as a Strategic Capability

Leadership establishes the foundation for effective use of digital technologies. This begins with articulating a clear vision and mission for digitalization that explains how digital technologies support the organization's purpose, strategic objectives, and value proposition. Digital strategy is not an IT strategy; it is an organizational strategy that defines where, why, and how digital technologies create value.

Leadership ensures that digital ambitions are translated into coherent strategic priorities and investment decisions, which are subsequently delivered through projects and programs. This includes defining target outcomes such as improved customer experience, operational excellence, data-driven decision-making, or accelerated innovation. Governance frameworks provide clarity on decision rights, accountability, ethical boundaries, and risk management, particularly when using artificial intelligence. Transparency, data responsibility, cybersecurity, and compliance with legal and ethical standards are integral to digital governance. Portfolio governance plays a central role in aligning digital initiatives with strategy. Leadership uses portfolios to balance innovation and stability, experimentation and scalability, and short-term efficiency gains with long-term capability building. As with sustainability, adaptability, agility, and resilience in PPP, digital capabilities are framed as enablers of strategic intent rather than ends in themselves.

Enabling Projects, Programs, and Portfolios with Digital Capabilities

Leadership ensures that digital capabilities are effectively embedded into how PPP are designed, managed, and delivered. Projects and programs increasingly rely on digital tools for collaboration, planning, monitoring, controlling, and stakeholder engagement. Data-driven portfolio dashboards, real-time project reporting, and predictive analytics enhance transparency and support informed decision-making at all levels.

Artificial intelligence further expands these capabilities by enabling pattern recognition, forecasting, scenario analysis, and decision support. It can assist in scope prioritization, risk identification, schedule optimization, resource allocation, and benefits tracking. When used responsibly, these technologies augment human judgment rather than replace it, improving speed, consistency, and insight while preserving accountability.

At the portfolio level, digital capabilities enable a holistic view of performance, dependencies, and value streams. Leadership leverages advanced analytics and AI-supported portfolio management to dynamically prioritize initiatives, allocate resources, and assess strategic fit. This supports faster response to change and strengthens the organization to deliver results across multiple concurrent initiatives.

Leadership ensures that the use of digital capabilities in PPP is purposeful and context-sensitive. Methodologies, tools, and solutions are tailored to

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complexity, uncertainty, and stakeholder needs, consistent with IPMA's situational and competence-based approach.

Digital Enablement of Value Creation

Aligned with the OCB's focus on delivering results, leadership ensures that investments in digital capabilities yield tangible and intangible benefits.

These include increased delivery efficiency, improved predictability, enhanced stakeholder satisfaction, and accelerated innovation. Digital capabilities also enable new forms of value, such as data-driven services, scalable solutions, and improved organizational learning. Leadership defines clear success criteria for digital initiatives and ensures that benefits extend beyond technical implementation, resulting in sustained operational and strategic impact. Reviews and evaluations assess not only whether digital solutions were delivered but also whether they improved decision-making, reduced friction, and strengthened the organization to deliver results through PPP. In essence, digital capabilities are judged by results, not by the sophistication of technology alone.

Organizational Enablers for Digital and AI-Enabled Performance

The organization's leadership establishes the conditions necessary to leverage digital capabilities effectively. Individual competences include digital literacy, data awareness, critical thinking, and ethical judgment, particularly when working with AI-supported systems. Leadership development emphasizes understanding the implications of digital capabilities for decision-making, power distribution, and accountability.

Organizational culture supports experimentation, learning, and responsible innovation. Psychological safety enables teams to explore digital solutions, learn from failure, and adapt practices based on feedback. Learning mechanisms ensure that insights gained from digital projects are institutionalized and shared across the organization.

Organizational structures, processes, and infrastructure support interoperability, data quality, and scalability. Cybersecurity, data governance, and AI ethics are embedded as foundational enablers rather than external constraints. Partnerships with technology providers and ecosystem actors extend digital capabilities while maintaining strategic control and ownership of competence.

Organizational Functions Enabling Digital Value Delivery

Moreover, leadership ensures that digital technologies are embedded across organizational functions, enabling PPP results to be realized and sustained. For example, Human Resources supports digital competence through recruitment, development, and performance systems that value learning and collaboration between technical and non-technical roles. Finance and Controlling enable digital initiatives through investment models, benefit tracking, and transparency on value creation. Operations ensure that digital solutions delivered by PPP can be reliably integrated into daily work. Quality management integrates digital tools for monitoring, assurance, and continuous improvement. Purchasing and partner management address digital sourcing, data access, and intellectual property responsibly. Marketing, Sales, and Product Management leverage digital insights and AI-driven analytics to translate customer and market signals into actionable requirements for PPP.

Through functional alignment, leadership ensures coherence between temporary digital initiatives and the permanent organization, reinforcing digital capabilities as a system-level capability.

In line with sustainability and adaptability, leveraging digital capabilities is key to delivering results. When embedded across strategy, governance, PPP management, enablers, and functions, digital technologies, including artificial intelligence, enhance the organization's capability to deliver value efficiently, innovatively, and responsibly. This is not achieved solely through tools, but by purposefully integrating technology, people, and governance to deliver results that strengthen competitiveness, efficiency, and innovation over time.

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4. Organizational Competence for Delivering Projects with Results

This chapter describes the concept of Organizational Competence in general and Organizational Competence for Delivering Projects with Results (OCPR) in particular. It describes the competences, with their Key Competence Indicators (KCIs), in detail and explains how they interact with contextual factors. As mentioned above, the IPMA OCB® is not a textbook or cookbook; the focus is on WHAT to do, not on HOW to do it. Each organization must adapt the concept to its specific needs. Supplementary publications, i.e., IPMA Practice Guides, provide detailed explanations of the HOW.

4.1. Organizational Competence

Organizational Competence refers to the collective, institutionalized capability of an organization to consistently achieve intended results across different contexts, over a long period of time, and on a large scale. In contrast to individual competence, which is based on the knowledge, skills, and abilities of individuals, organizational competence arises from the interaction among people, structures, processes, control mechanisms, culture, and enabling resources. The concept builds on the groundbreaking notion of '*The Core Competence of the Corporation*' (Prahalad & Hamel, 1990), which emphasizes the integration of different technologies and capabilities into distinctive organizational competence that enables competitive advantages. These ideas were later embraced by academia and further developed as the *resource-based view* (RBV). According to this view, an organization's (core) competence is understood as a configuration of valuable, rare, inimitable, and non-substitutable resources embedded in organizational routines and systems, not just in individual people. More recently, Teece (2009) has extended this perspective, describing it as a model of dynamic capabilities that emphasizes an organization's capability to identify opportunities and risks, exploit them through effective decision-making, and transform its resource base in response to changing environments. Subsequently, organizational competence is not the sum of individual competences.

While individual expertise is an enabler, organizational competence arises when individual contributions are coordinated and amplified by governance and management systems, organizational strategy, structure, processes, methods, tools, leadership, and culture. In this sense, organizational competence is inherently relational and systemic. It manifests itself in predictable patterns of action and decision-making, even when individuals change.

4.2. Organizational Competence for delivering Projects with Results

The IPMA OCB® defines organizational competence for delivering projects with results as the *capability of an organization to consistently turn strategy into results through the effective governance, management, support, and alignment of projects, programs, and portfolios, and by utilizing available enablers and functional expertise*. Figure 10 provides an overview of this in the internal and external context of the organization. It shows the IPMA OCB's overall focus. The center of the figure depicts the project-oriented part of the organization, responsible for delivering projects. Vital components of this part of the organization are governance and management, as well as support for the projects, programs, and portfolios it realizes. The project-oriented part of the organization is closely aligned with the organization's strategic function, which sets the objectives and other framework conditions for the projects to be delivered. A close alignment is also necessary with project, program, and portfolio results, which must conform to the objectives and framework conditions defined by the strategy. This alignment involves various feedback loops that promote organizational learning and the continuous development of these competences into dynamic capabilities, while integrating them with one another.

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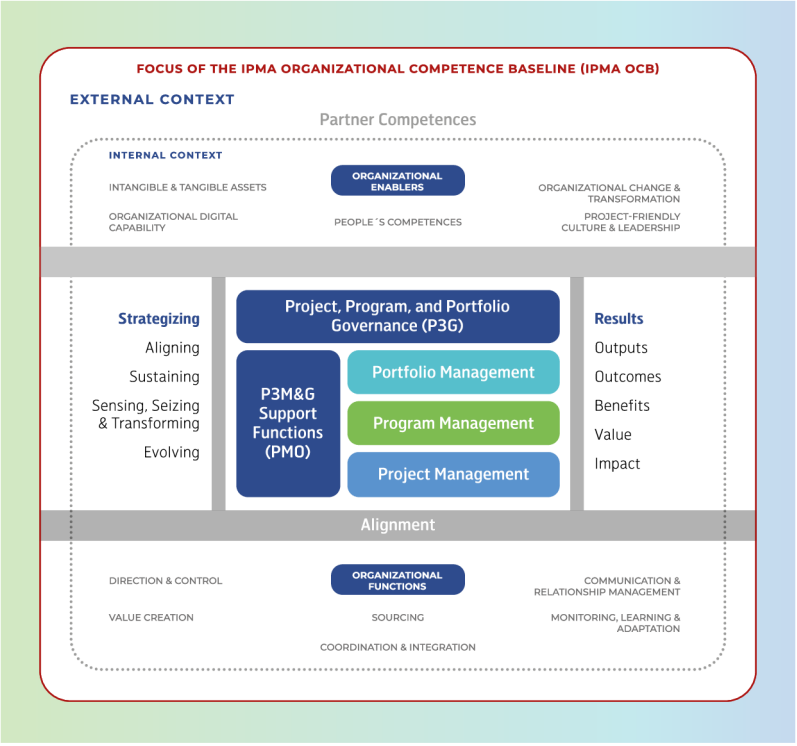


Figure 10: Focus of the IPMA Organizational Competence Baseline

The project-oriented organization uses the expertise of the functional departments to deliver projects. This includes, for example, HR, marketing and sales, research and development, finance, controlling, and procurement. On the other hand, many enablers are also necessary to deliver the projects. These include, for example, intangible assets, people´s competences, organizational digital capabilities, leadership, and culture, to name just a few. Some of the enablers may be external to the embedding organization, such as the competences of partners involved in delivering projects, including, but not limited to, customers, suppliers, and specialized service providers. Although the IPMA OCB® covers the entire organization, its guidelines focus on the project-oriented parts involved in delivering projects with results. The standard is generic and therefore unable to fully reflect the details of individual organizations. Emphasis has been placed on the key components of organizational competence; when applying the standard, consideration should be given to adapting it to the specific context.

Figure 11 provides an overview of the ten competences that constitute Organizational Competence for delivering Projects with Results. As a starting

point for OCPR, **Strategic Competence** provides a strategic orientation and sets specific objectives aligned with the organization's overall strategy. The **PPP Governance (P3G) Competence** ensures that the principles, policies, and frameworks that govern how projects, programs, and portfolios are directed and controlled are in place. This competence provides a frame for the other competences of the project-oriented organization. Key competences of the project-oriented part of the organization are **Project Management Competence, Program Management Competence**, and **Portfolio Management Competence**, which focus on managing the respective areas. Finally, it is worth mentioning the management and governance support competence for projects, programs, and portfolios, or in other words, the **P3M&G Support Competence**.

To ensure that the results of projects, programs, and portfolios are achieved as required, **Results Assurance Competence** is included in the OCPR. Project implementation requires **Functional Competence** that integrates the specialized know-how of the functional departments into projects. In addition, a range of enablers, or **Enabling Competence**, such as digital competence, assets, and a project-friendly culture, is needed to deliver results. Finally, **Alignment Competence** is required to coordinate all competences and the organizational parts involved in delivering projects. The backbone of the OCPR is shown in the center of Figure 11: the link between strategic competence and results assurance, ensuring that projects, programs, and portfolios, together with their governance and support competences, turn strategy into results. Functional, enabling, and alignment competences contribute to achieving this.

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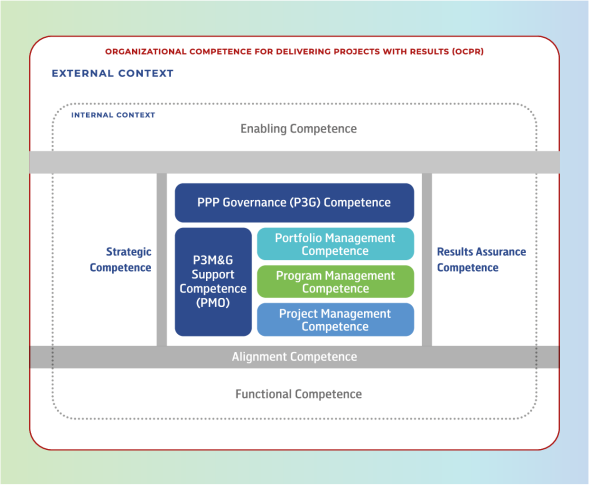


Figure 11: Organizational Competence for delivering Projects with Results (OCPR)

4.3. Description of the competences with their KCIs

This chapter provides a structured, detailed description of all competences, along with their Key Competence Indicators.

4.3.1. Strategic Competence

Definition
Strategic competence is the capability of an organization to provide strategic direction for projects, programs, and portfolios. This builds on the organization's overall mission, vision, and strategy, ensuring that project delivery consistently contributes to achieving the intended results.

Purpose
The purpose of strategic competence is to ensure that the organization invests its limited resources in the right projects and manages them to achieve intended results, support the organization's strategic objectives, and respond effectively to changes in the internal and external environment. It ensures that strategic objectives are translated into executable PPP objectives with measurable outcomes, benefits, and value indicators, and regularly evaluates their realization against strategic intent. Strategic

competence enables informed decisions and ensures consistency between strategic intent and its delivery through projects.

Description

An organization with well-developed Strategic Competence demonstrates a clear and explicit alignment between its overall mission, vision, strategy, and its project delivery system. This includes establishing a mission, vision, and strategic objectives for the PPP that align with the overall mission, vision, and strategy. Strategic objectives are translated into objectives for projects, programs, and portfolios with measurable results and respective criteria, guiding the selection, prioritization, and management of projects. Decision-making processes are transparent, consistent, and based on criteria such as strategic fit, impact, value, and sustainability.

Strategic Competence contributes to sustainable development by ensuring that projects and programs are selected, prioritized, and managed with consideration for long-term economic, social, and environmental impacts. The organization integrates sustainability principles into strategic objectives, investment criteria, and success measures, balancing short-term performance with long-term resilience, resource stewardship, and stakeholder well-being. In this way, Strategic Competence enables project delivery to actively support sustainable development goals while safeguarding the organization's long-term viability and legitimacy.

Strategic Competence supports the development and application of dynamic capabilities, enabling the organization to sense, seize, and transform in response to internal and external change. The organization systematically senses emerging trends, risks, and opportunities arising from its environment, strategy, and feedback. It seizes these insights by translating them into strategic choices, portfolio adjustments, and decisions that realign projects, programs, and portfolios with evolving priorities. Through structured change mechanisms, the organization transforms its capabilities and ways of working, ensuring that project delivery remains strategically adaptive and resilient.

Strategic competence enables organizations to evolve by promoting continuous development through ideation, innovation, and organizational learning. The organization actively generates and explores ideas grounded in strategic intentions, environmental insights, and project experiences. These ideas are translated into incremental and, where appropriate, transformative innovations within the portfolio, allowing strategic priorities, implementation approaches, and operational practices to be refined incrementally. By systematic learning, feedback loops, and continuous improvement

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mechanisms, the organization ensures that project implementation continues to evolve in line with new requirements, opportunities, and long-term strategic direction.

4.3.1.1. Align overall mission, vision, and strategy with objectives and results for PPP

Description
This key competence indicator assesses the organization's capability to determine a mission, vision, and strategic objectives for PPPs based on the overall organization's mission, vision, and strategic objectives. Moreover, strategic alignment should be ensured vertically across portfolios, programs, projects, and horizontally across different organizational units to leverage organizational synergies. Strategic intentions are systematically translated into measurable objectives and results, with criteria that guide the selection, prioritization, and delivery of projects. The progress and results of projects, programs, and portfolios are regularly compared with the strategic objectives to confirm ongoing alignment. Any discrepancies between the strategic direction and the delivery results are addressed early on through corrective or adaptive measures. In this way, the organization ensures that project delivery consistently contributes to achieving its long-term goals.

Measures
- Clearly align and maintain consistency between the mission statement, vision, and strategic objectives of the entire organization and those of the PPP.
- Establish transparent criteria for assessing strategic alignment during the selection and prioritization of projects and programs.
- Translate strategic objectives into objectives for PPP with respective results.
- Conduct regular portfolio reviews to assess alignment between strategic objectives and the results of projects and programs.
- Adapt, re-scope, or terminate projects, programs, and portfolios that no longer demonstrate sufficient strategic contribution.

4.3.1.2. Ensure that the organization contributes to sustainable development

Description
This Key Competence Indicator assesses the organization's capability to ensure that all activities, including but not limited to projects, programs, and

portfolios, contribute to sustainable development. Sustainability principles are embedded in strategic objectives and are reflected in the selection, prioritization, and management of PPP. Decisions consider long-term economic, social, and environmental impacts alongside short-term performance and delivery objectives. Success measures and benefits frameworks incorporate sustainability-related criteria to promote resilience, responsible resource use, and positive stakeholder outcomes. Governance and review mechanisms ensure that sustainability considerations remain integral throughout the life cycle of PPP. Through this approach, the organization safeguards its long-term viability, credibility, and legitimacy while contributing to broader sustainable development goals.

Measures

- Integrate economic, social, and environmental sustainability criteria into portfolio selection and prioritization processes.
- Define sustainability-related objectives that align with the overall strategy and derive results for projects and programs beyond the typical short-term perspective.
- Assess long-term societal, environmental, and economic impacts, risks, and opportunities as part of the strategic decision-making for PPP.
- Monitor and review sustainability performance and achieved results at project, program, and portfolio levels.
- Adjust, re-scope, or discontinue projects that do not sufficiently contribute to the organization's sustainable development objectives.

4.3.1.3. Sense, seize, and transform in response to internal and external change

Description

This Key Competence Indicator evaluates the organization's capability to develop and apply dynamic capabilities to remain effective amid internal and external change. The organization systematically senses emerging trends, risks, and opportunities through environmental scanning, strategic review, and feedback from projects, programs, and portfolios. These insights are seized through timely strategic choices and portfolio-level decisions that adjust priorities, investments, and governance arrangements. Projects, programs, and portfolios are realigned to reflect evolving objectives and changing conditions. Through structured change and learning mechanisms, the organization transforms its capabilities and ways of working, ensuring that project delivery remains adaptive, resilient, and strategically coherent over time.

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Measures

- Establish systematic processes for sensing internal and external trends, risks, and opportunities relevant to project delivery.
- Integrate insights from sensing activities into strategic decision-making, governance, and management of PPP.
- Enable timely portfolio adjustments, including re-prioritization, re-scoping, or termination of projects and programs.
- Implement structured change mechanisms to evolve organizational capabilities, processes, and delivery practices.
- Capture and apply lessons learned to support continuous adaptation and long-term organizational resilience.

4.3.1.4. Enable the organization to evolve through ideation, innovation, and organizational learning

Description

This Key Competence Indicator assesses the organization's capability to enable continuous evolution through structured ideation, innovation, and organizational learning. The organization systematically generates and explores ideas derived from strategic intent, environmental insights, and experience gained from projects, programs, and portfolios. Relevant ideas are evaluated and translated into incremental or, where appropriate, transformative innovations within the portfolio. These innovations support the progressive refinement of strategic priorities, delivery approaches, and operational practices. Through established learning processes, feedback loops, and continuous improvement mechanisms, the organization ensures that project delivery evolves in response to emerging requirements, opportunities, and long-term strategic direction.

Measures

- Establish structured mechanisms for ideation informed by strategy, experience, and co-creation activities.
- Evaluate and prioritize ideas based on strategic relevance, potential, and feasibility.
- Integrate approved innovations into delivery practices for projects, programs, and portfolios.
- Implement systematic learning and feedback processes across projects, programs, and portfolios and disseminate the findings across the organization.
- Apply lessons learned and improvement actions to continuously refine capabilities, processes, and ways of working.

4.3.2. PPP Governance (P3G) Competence

Definition
Governance of PPP Competence is the organizational capability to define, establish, and operate a coherent system for directing, overseeing, and making strategic decisions for projects, programs, and portfolios, ensuring alignment with the organization's overall governance framework, values, and strategic objectives.

Purpose
The purpose of Governance of PPP Competence is to ensure that projects, programs, and portfolios are governed in a consistent, transparent, and accountable manner that supports organizational strategy and stakeholder expectations. It provides values (such as respect, fairness, responsibility, honesty, and integrity), principles, guidelines, and decision-making arrangements necessary to balance value creation, risk, and resource use across PPP. It evaluates the effectiveness of governance structures and decision-making processes based on their contribution to intended results. By strengthening this competence, the organization ensures clarity of authority, effective oversight, and informed strategic decision-making, while safeguarding compliance, integrity, and long-term organizational interests.

Description
An organization with well-developed Governance of PPP Competence aligns the governance of projects, programs, and portfolios with general governance requirements, including organizational policies, regulatory obligations, and ethical standards. It establishes shared values, principles, and guidelines that define how PPP are overseen, directed, and controlled, ensuring consistency across organizational units and delivery contexts. The organization clearly defines and empowers governing bodies and roles with appropriate mandates, decision rights, and accountability for overseeing PPP. These bodies are enabled with timely, relevant, and reliable information to fulfill their oversight responsibilities effectively. Through structured oversight and strategic decision-making, the organization ensures that PPP remain aligned with strategic objectives, deliver intended value, and respond appropriately to changing conditions.

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4.3.2.1. Align Governance of PPP with general governance requirements

Description
This Key Competence Indicator assesses the organization's capability to align the governance of projects, programs, and portfolios with its overall governance framework. The organization ensures that arrangements for governing PPP are consistent with corporate governance requirements, including strategic direction, accountability, transparency, and compliance, as reflected in recognized governance standards such as ISO 21505. Governance of PPP is designed as an integral part of the organization's overall system for directing and controlling activities, rather than as a separate or isolated practice. Common governance principles and decision logic are applied consistently across PPP and other organizational domains. Through this alignment, the organization ensures coherence, integrity, and clarity in how PPP are directed and overseen.

Measures
- Identify and document how general internal and external governance requirements apply to the Governance of PPP.
- Align the Governance of PPP with organizational governance frameworks and/ or recognized standards such as the ISO 21505.
- Ensure consistency between the Governance of PPP and the organization´s policies, compliance requirements, and ethical standards.
- Establish clear interfaces between organizational governance arrangements and those applied to PPP.
- Periodically review and adapt PPP governance arrangements to reflect changes in organizational governance requirements or external standards.

4.3.2.2. Establish values, principles, and guidelines for the Governance of PPP

Description
This Key Competence Indicator assesses the organization's capability to define and embed a coherent set of values, principles, and guidelines for governing projects, programs, and portfolios (PPP). These elements provide a common foundation for how PPP are directed, overseen, and controlled across the organization. Values and principles reflect the organization's ethical standards, strategic intent, and expectations regarding behavior, decision-making, and accountability. Guidelines translate these values and principles into practical direction for the governance of PPP, enabling consistency while allowing appropriate flexibility. Through shared values,

principles, and policies, the organization ensures clarity, coherence, and integrity in the governance of PPP.

Measures
- Define and document organizational values and governance principles applicable to PPP.
- Ensure alignment of PPP governance values and principles with the organization´s overall strategy, ethics, and culture.
- Develop guidelines that translate governance principles into practical direction for PPP.
- Communicate and promote governance values, principles, and guidelines across the organization.
- Periodically review and update governance values, principles, and guidelines to reflect organizational learning and change.

4.3.2.3. Authorize and enable governing bodies for overseeing PPP

Description
This Key Competence Indicator assesses the organization's capability to formally authorize and enable governing bodies to oversee projects, programs, and portfolios. The organization establishes clear mandates that define the scope, authority, and decision rights required for effective oversight of PPP. Authorization ensures that governing bodies operate within the organization's overall governance framework and are empowered to fulfill their oversight responsibilities. The organization provides the necessary structures, information flows, and support to enable effective oversight. Through formal authorization, the organization ensures clarity, legitimacy, and consistency in the oversight of PPP.

Measures
- Define and document formal mandates for governing bodies overseeing PPP.
- Authorize and empower governing bodies in accordance with organizational governance frameworks and policies.
- Specify decision rights and escalation paths related to oversight of PPP.
- Provide governing bodies with access to relevant, timely, and reliable information.
- Periodically review and confirm the authorization and effectiveness of governing bodies overseeing PPP.

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4.3.2.4. Perform oversight and strategic decision-making regarding PPP

Description
This Key Competence Indicator assesses the organization's capability to perform effective oversight and strategic decision-making for projects, programs, and portfolios. The organization ensures that oversight activities provide a comprehensive view of performance, risks, opportunities, and alignment with strategic objectives. It ensures that strategic decisions are traceable through comprehensible documentation of the rationale, decision outcomes, stakeholder communication, and related details. Strategic decisions are based on reliable information and support the prioritization, continuation, adaptation, or termination of PPP. Oversight enables the timely identification of deviations and emerging issues that may affect value delivery. Through structured oversight and informed decision-making, the organization ensures that PPP contribute to strategic objectives and deliver results.

Measures
- Establish standard practices for overseeing performance, risks, and strategic alignment of PPP.
- Ensure availability of consolidated, decision-relevant information to support strategic decision-making.
- Define decision criteria for (re-)prioritizing, adapting, or discontinuing PPP.
- Conduct regular reviews to assess the strategic contribution of PPP.
- Use oversight insights to inform strategic adjustments and continuous improvement of PPP management practices.

4.3.3. Project Management Competence

Definition
Project management competence is the capability of an organization to systematically establish, consistently apply, and continuously improve a coherent system of principles, practices, processes, methods, and tools, with associated roles, responsibilities, and collaboration tailored to the requirements of all projects.

Purpose
The purpose of Project Management Competence is to enable the organization to deliver projects in a predictable, efficient, and controlled way

while supporting strategic objectives and stakeholder expectations. It provides a commonly accepted foundation for how projects are initiated, designed, managed, and performed, reducing variability in performance. By strengthening Project Management Competence, the organization ensures that projects clarify objectives and scope, use resources efficiently, lead and engage people effectively, and deliver agreed-upon outputs within approved constraints.

Ultimately, this competence supports organizational learning, transparency, and accountability across the project portfolio.

Description
An organization with well-developed Project Management Competence establishes clear standards for managing projects throughout their entire lifecycle. Project objectives, scope, deliverables, and other results are clarified up front and maintained through systematic change control. Projects are designed and managed using appropriate processes, practices, methods, and tools to ensure efficient use of time, budget, and resources. The organization ensures that project leaders and teams are appropriately selected, supported, and empowered to organize work, collaborate across boundaries, and lead all people involved. The performance of projects is systematically monitored against agreed baselines for scope, schedule, cost, and quality, enabling timely corrective actions. Through consistent application of these practices and continuous improvement based on lessons learned, the organization achieves reliable project outcomes while strengthening its overall project delivery capability.

4.3.3.1. Clarify project objectives, scope, deliverables, and other results

Description
This Key Competence Indicator assesses the organization's capability to ensure that project objectives, scope, deliverables, and expected results are clearly defined, agreed upon, and communicated at the outset and throughout the entire project lifecycle. Strategic and stakeholder requirements are translated into unambiguous objectives and measurable results. The scope of work and expected deliverables are documented at an appropriate level of detail and are the basis for planning, decision-making, and control. Management mechanisms ensure that assumptions, constraints, and dependencies are explicitly addressed and systematically managed. Clear definitions enable consistent alignment among stakeholders and provide a stable foundation for effective project execution and change control.

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Measures

- Establish standard practices for defining and documenting project objectives, scope, deliverables, and results.
- Ensure stakeholder requirements and expectations are systematically captured, analyzed, and validated.
- Approve and baseline objectives, scope, and deliverables through formal decision-making processes.
- Communicate agreed-upon objectives, scope, and expected results consistently to all relevant stakeholders.
- Establish structured change control to manage and approve changes to objectives, scope, or deliverables.

4.3.3.2. Design and manage projects to deliver results efficiently

Description

This Key Competence Indicator assesses the organization's capability to design and manage projects in a structured and efficient manner for delivering agreed-upon results. The organization offers suitable approaches, such as agile, hybrid, and waterfall practices, principles, methodologies, and tools for designing project management to the needs of each project. Project categories have been established to determine the approach to planning and managing projects based on factors such as complexity, volume, risk, context, and others. The organization provides standards for systematically planning, monitoring, and controlling scope, schedules, resources, budgets, and risks to optimize performance and minimize waste. Control mechanisms support timely interventions and informed decisions throughout project delivery. Through consistent application of effective management practices, the organization enables projects to deliver intended results efficiently and reliably.

Measures

- Define and maintain a set of approved PM approaches, including agile, hybrid, and predictive practices, supported by common principles, methodologies, and tools.
- Establish and apply project categorization criteria (e.g. complexity, risk, volume) to determine the appropriate management and delivery approach.
- Provide organizational standards (e.g. based on ISO 21502) for integrated planning tailored to the selected project approach.
- Ensure consistent monitoring and control of project performance, enabling timely escalation, corrective action, and informed decision-making.
- Review and improve project management practices based on performance data, lessons learned, and efficiency outcomes.

4.3.3.3. Organize and lead all people involved in projects

Description

This key competence indicator assesses the organization's capability to create the conditions that enable it to organize and lead all people involved in projects effectively. This consists of the organization defining clear roles with tasks, authorities, and accountabilities together with responsibility matrices (RASIC) that determine how stakeholders collaborate across organizational units and interfaces. It provides policies, leadership principles, and support mechanisms that serve as guidelines for collaboration and decision-making among project managers, teams, and other stakeholders. The organization ensures that project managers and key personnel are empowered, supported, and held accountable within a uniform framework. Through these organizational arrangements, the organization enables effective leadership, collaboration, and involvement of all individuals who contribute to project delivery.

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Measures

- Define and maintain standard project-related roles, including tasks, authorities, and accountabilities, supported by responsibility assignment matrices (e.g. RASIC).
- Establish organizational policies and leadership principles that guide collaboration, behavior, and decision-making across projects.
- Provide support mechanisms (e.g. coaching, escalation paths, communities of practice) to enable effective leadership and collaboration.
- Ensure that project managers and key personnel are consistently empowered with the necessary authority and resources within a uniform organizational framework.
- Monitor the effectiveness of organizational arrangements for leadership and collaboration and improve them based on feedback and performance results.

4.3.3.4. Monitor and control the performance of project delivery

Description

This Key Competence Indicator assesses the organization's capability to establish and operate a consistent approach for monitoring and controlling the performance of project delivery. The organization defines common performance objectives, indicators, and tolerance thresholds that apply across all projects. Standardized monitoring and reporting practices provide timely and reliable information on project progress, risks, issues, and deviations from agreed plans. The organization enables early identification of performance trends and variances to support timely corrective actions. Through systematic monitoring and control, the organization ensures predictability, transparency, and continuous improvement in project delivery.

Measures

- Define standard performance indicators, targets, and tolerance thresholds applicable to all projects.
- Establish consistent monitoring and reporting practices for tracking project progress and performance.
- Provide mechanisms for identifying, analyzing, and addressing deviations from agreed plans.
- Ensure organization-wide transparency of project performance through consolidated views and summaries.
- Use performance data and lessons learned to continuously improve project delivery practices.

4.3.4. Program Management Competence

Definition
Program Management Competence is the organizational capability to establish, apply, and continuously improve a coherent system for initiating, structuring, and managing programs that coordinate related projects and activities to enable change and realize intended benefits aligned with strategic objectives.

Purpose
The purpose of Program Management Competence is to enable the organization to manage complex change initiatives in a structured and integrated manner and to ensure that benefits are systematically identified, realized, and sustained. It provides a common organizational framework for managing programs, including but not limited to defining program objectives and scope, managing interdependencies, coordinating stakeholders, and monitoring performance. By strengthening this competence, the organization increases its capability to translate strategic objectives into coordinated change and to deliver outcomes that extend beyond individual project results.

Description
An organization with well-developed Program Management Competence ensures that program objectives, scope, benefits, and expected results are clearly defined and aligned with strategic intent. Programs are designed and managed as vehicles for change, coordinating multiple projects, operational activities, and stakeholders to realize planned benefits. The organization provides standards, principles, and practices for managing interdependencies, sequencing initiatives, and adapting programs as change unfolds. Collaboration among all parties involved in programs is actively orchestrated through clear interfaces, communication practices, and alignment mechanisms. The program performance is systematically monitored and controlled against objectives, benefits, and key milestones, enabling informed decisions and timely adjustments. Through consistent application of these practices, the organization ensures that programs effectively enable change and deliver sustained value.

4.3.4.1. Clarify program objectives, scope, benefits, and other results

Description
This Key Competence Indicator assesses the organization's capability to ensure that program objectives, scope, benefits, and expected results are

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clearly defined, aligned with strategic objectives, and consistently applied across the organization. Strategic intent and change expectations are translated into coherent programlevel objectives and measurable benefits. The organization provides standards and guidance for defining program scope, expected benefits, and other results. Stakeholder expectations and dependencies are systematically considered when defining programs. Clear and shared definitions provide a stable foundation for managing change and realizing benefits.

Measures

- Establish organizational standards for defining and documenting program objectives, scope, benefits, and other results.
- Ensure alignment of program objectives and benefits with strategic objectives as well as change priorities.
- Provide guidance for identifying, structuring, and quantifying expected benefits and other results.
- Require formal approval and baselining of program objectives, scope, and benefits.
- Apply structured change control for modifications to program objectives, scope, or expected benefits.

4.3.4.2. Design and manage programs to enable change and realize benefits

Description

This Key Competence Indicator assesses the organization's capability to establish and apply a consistent approach for designing and managing programs as vehicles for change and benefits realization. The organization provides principles, practices, and structures for integrating projects, change activities, and ongoing operations within programs. Programs are designed to manage interdependencies, sequence initiatives, and progressively enable change. The organization ensures that benefits realization is planned, monitored, and supported throughout the program lifecycle. Through a structured and adaptive approach to program design and management, the organization enables sustained change and the realization of intended benefits.

Measures

- Establish organizational principles and practices for the design and management of programs, building on international standards such as ISO 21503.
- Provide standards for integrating projects, change activities, and other related work within programs.
- Define approaches for managing interdependencies, sequencing, and transition of program components.
- Require benefits realization planning and tracking as an integral part of program management.
- Review and improve organizational program management practices based on change outcomes and realized benefits.

4.3.4.3. Orchestrate collaboration of all parties involved in programs

Description

This Key Competence Indicator assesses the organization's capability to establish the conditions that enable effective collaboration among all parties involved in programs. The organization defines common principles, structures, and interfaces that support coordination across projects, operational units, and external stakeholders participating in programs. It provides guidance for communication, alignment, and decision-making across organizational boundaries. The organization ensures that responsibilities and interactions are clearly structured to support integrated program delivery. Through these organizational arrangements, collaboration is orchestrated to enable coherent change and effective benefits realization.

Measures

- Define organizational principles and frameworks for collaboration across projects and operational units within programs.
- Establish standard interfaces and communication practices to support coordination among program stakeholders.
- Provide guidance and support mechanisms for managing cross-organizational collaboration in programs.
- Ensure clarity and consistency in responsibilities and interactions among parties involved in programs.
- Monitor and improve collaboration practices based on feedback and program delivery results.

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4.3.4.4. Monitor and control the performance of program delivery

Description
This Key Competence Indicator assesses the organization's capability to establish and apply a consistent approach for monitoring and controlling the performance of program delivery. The organization defines common performance objectives, indicators, and thresholds that enable transparency and comparability across programs. Standardized monitoring and reporting practices provide timely information on progress, benefits realization, risks, and interdependencies. The organization enables early identification of deviations and trends to support timely corrective actions. Through systematic performance monitoring and control, the organization ensures that programs effectively enable change and deliver intended benefits.

Measures
- Define standard performance indicators and thresholds for program delivery and benefits realization.
- Establish consistent monitoring and reporting practices for program performance.
- Enable early identification and analysis of deviations, risks, and emerging issues.
- Provide mechanisms for timely corrective actions based on performance information.
- Use performance insights and lessons learned to improve organizational program management practices.

4.3.5. Portfolio Management Competence

Definition
Portfolio Management Competence is the organizational capability to establish, apply, and continuously improve a systematic approach for identifying, evaluating, selecting, prioritizing, balancing, and overseeing projects and programs as a portfolio to achieve strategic objectives and optimize value.

Purpose
The purpose of Portfolio Management Competence is to enable the organization to invest its resources in the right combination of projects and programs and to manage them as an integrated whole. It provides a structured framework for translating strategic objectives into investment decisions, balancing factors such as value, risk, capacity, and constraints. By

strengthening this competence, the organization ensures that the portfolio remains aligned with strategy, responsive to change, and focused on results.

Description
An organization with well-developed Portfolio Management Competence systematically identifies and evaluates potential components based on factors such as strategic relevance, expected value, risks, and constraints. Transparent criteria and processes are applied to select and prioritize projects and programs in line with strategic objectives and available capacity. The organization actively balances and optimizes the portfolio to achieve an appropriate mix of initiatives, considering factors such as risk, resource utilization, timing, and strategic impact. Portfolio performance is continuously monitored against defined objectives, indicators, and thresholds to ensure transparency and control. Through informed decision-making and regular adjustment, the organization maintains a portfolio of projects and programs that delivers intended results and supports long-term strategic objectives.

4.3.5.1. Identify and evaluate potential portfolio components

Description
This Key Competence Indicator assesses the organization's capability to systematically identify and evaluate potential projects and programs as portfolio components (see ISO 21504). The organization establishes consistent processes for capturing proposals and opportunities arising from strategic objectives, operational needs, and other sources. Potential portfolio components are evaluated using defined criteria that consider factors such as strategic alignment, results, risks, resource requirements, and constraints. The organization ensures that evaluation is performed in a structured and transparent manner to support informed decision-making. Through this capability, the organization builds a reliable basis for selecting and managing a portfolio that supports strategic objectives.

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Measures

- Establish organizational processes for identifying potential portfolio components.
- Define standard evaluation criteria covering factors such as strategic fit, results, risks, resource requirements, and constraints.
- Require consistent documentation and assessment of proposed portfolio components.
- Ensure that evaluation outcomes are comparable and transparent across all proposals.
- Periodically review and improve identification and evaluation practices based on portfolio performance and organizational learning.

4.3.5.2. Select and prioritize portfolio components

Description

This Key Competence Indicator assesses the organization's capability to select and prioritize portfolio components in a structured and consistent manner (see ISO 21504). The organization applies defined decision criteria to determine which projects and programs are authorized for inclusion in the portfolio. Prioritization reflects factors such as strategic objectives, results, risks, resource capacity, and constraints. Decisions are based on comparable and reliable information to ensure transparency and consistency. Through this capability, the organization ensures that its portfolio reflects strategic intent and optimized use of resources.

Measures

- Define and apply decision criteria for selecting and prioritizing portfolio components.
- Use structured methods to compare and rank portfolio components based on strategic and results-based considerations.
- Ensure that selection and prioritization decisions consider resource capacity, constraints, and risk exposure.
- Document selection and prioritization decisions to ensure transparency and traceability.
- Periodically review and adjust selection and prioritization practices based on portfolio performance and strategic changes.

4.3.5.3. Balance and optimize the portfolio of projects and programs

Description
This Key Competence Indicator assesses the organization's capability to balance and optimize its portfolio of projects and programs (see ISO 21504). The organization actively manages the portfolio's composition to achieve an appropriate mix of projects and programs that collectively support strategic objectives. Portfolio balancing considers factors such as results, risks, timing, interdependencies, and resource utilization. The organization evaluates trade-offs to optimize overall portfolio performance rather than the performance of individual components. Through ongoing adjustments and optimizations, the organization ensures the portfolio remains aligned with strategy and capable of delivering maximum results.

Measures
- Define criteria and methods for balancing the portfolio of projects and programs.
- Analyze portfolio composition with respect to factors such as results, risk, resource capacity, timing, and interdependencies.
- Identify and evaluate trade-offs to optimize overall portfolio performance.
- Adjust portfolio composition through re-prioritization, sequencing, or reallocation of resources.
- Review portfolio balance and optimization outcomes to support continuous improvement of portfolio management practices.

4.3.5.4. Monitor and control the performance of the portfolio

Description
This Key Competence Indicator assesses the organization's capability to monitor, control, and report on the performance of the portfolio and its components (see ISO 21504). The organization establishes a consistent framework for defining portfolio performance objectives, indicators, and tolerance thresholds. Consolidated monitoring and reporting provide transparency into factors such as progress, results, risks, strategic alignment, impacts on society, and the environment. Performance information supports the timely identification of deviations, trends, and emerging issues across the portfolio. Through systematic monitoring, controlling, and reporting, the organization enables informed decisions and maintains effective oversight of portfolio performance.

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Measures

- Define standard portfolio performance indicators, targets, and tolerance thresholds.
- Establish regular portfolio monitoring and reporting practices, including consolidated performance views.
- Ensure timely and accurate reporting on factors such as portfolio progress, results, risks, and strategic alignment.
- Enable analysis and response to deviations and trends based on reported portfolio performance information.
- Use portfolio performance insights and reports to support decision-making and continuous improvement of portfolio management practices.

4.3.6. P3M&G Support Competence

Definition

Project, Program, Portfolio Management and Governance (P3M&G) Support Competence is the organizational capability to establish, operate, and continuously improve support structures and services, such as Project Management Offices (PMOs), that enable the effective management and governance of PPP, and the systematic development of the organization's competence for delivering projects with results.

Purpose

The purpose of the P3M&G Support Competence is to provide consistent, valueadding support that enhances the organization's capability to deliver projects, programs, and portfolios in line with strategic objectives. It ensures that P3M is supported by appropriate processes, methods, tools, guidance, information, and expertise. In addition, this competence supports the project, program, and portfolio governance (P3G) and the systematic development of the Organizational Competence for delivering Projects with Results (OCPR), including the P3M and P3G competences. Through fit-for-purpose support structures, the organization improves consistency, transparency, and performance across PPP. However, it is not possible to fully reflect the full range of support options available in practice here.

4.3.6.1. Support the delivery of projects, programs, and portfolios

Description

This Key Competence Indicator assesses the organization's capability to provide structured, coordinated support for the delivery of projects, programs, and portfolios through dedicated support entities, such as Project

Offices, Program Offices, and Portfolio Offices. The organization defines support services that assist planning, execution, coordination, and reporting at appropriate levels. Support is tailored to the needs, scale, and complexity of initiatives while promoting consistency across delivery practices. The organization ensures that support offices collaborate effectively to enable integration across projects, programs, and portfolios. Through this support, the organization enhances delivery performance, transparency, and predictability.

Measures

- Establish and maintain Project Offices, Program Offices, and Portfolio Offices with clearly defined support services.
- Define standard support services, methods, tools, and templates provided by each type of office.
- Ensure coordination and information flow between Project, Program, and Portfolio Offices (P30).
- Tailor support services to the complexity, size, and delivery context of projects, programs, and portfolios.
- Review and improve support office performance based on delivery results, feedback, and organizational learning.

4.3.6.2. Support the governance of projects, programs, and portfolios

Description

This Key Competence Indicator assesses the organization's capability to support the governance of projects, programs, and portfolios through appropriate support structures at different organizational levels. Strategic and Operational Project Management Offices (PMOs) provide governance-related support aligned with their respective scope and mandate. Strategic PMOs support organization- or portfolio-wide governance by enabling transparency, consistency, and alignment with strategic objectives, while Operational PMOs support the application of governance practices at project and program levels. The organization ensures that governance support services are clearly defined, coordinated, and integrated across organizational levels. Through effective governance support, the organization enhances oversight, decision-making quality, and compliance across projects, programs, and portfolios.

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Measures

- Define governance support services provided by Strategic and Operational PMOs in alignment with organizational levels.
- Ensure that PMOs support the application of governance principles, frameworks, and guidelines across projects, programs, and portfolios.
- Provide consolidated, decision-relevant information and reporting to support governance activities.
- Coordinate governance support between Strategic and Operational PMOs to ensure consistency and alignment.
- Review and improve governance support services based on organizational needs, governance outcomes, and feedback.

4.3.6.3. Support the development of P3M and P3G competences

Description

This Key Competence Indicator assesses the organization's capability to systematically support the development of project, program, and portfolio management (P3M) and project, program, and portfolio governance (P3G) competences. Strategic and Operational Project Management Offices (PMOs) contribute to the competence development at different organizational levels in line with their mandates. Strategic PMOs support organization-wide competence development, alignment with standards, and improvement activities, while Operational PMOs support the practical application and reinforcement of competences in projects and programs. The organization ensures that development activities are coordinated, targeted, and aligned with organizational objectives. Through structured competence development, the organization strengthens the effectiveness and consistency of P3M and P3G practices.

Measures

- Define P3M and P3G competence development objectives and priorities at organizational and operational levels.
- Assign responsibility to Strategic and Operational PMOs for supporting competence development in line with their mandates.
- Provide training, coaching, mentoring, and knowledge-sharing mechanisms to develop P3M and P3G competences.
- Promote the adoption of standards, frameworks, and best practices for P3M and P3G across the organization.
- Monitor and improve competence development initiatives based on competence assessments, performance outcomes, and feedback.

4.3.6.4. Support the development of the overall OCPR

Description
This Key Competence Indicator assesses the organization's capability to support the systematic development of its overall Organizational Competence for delivering Projects with Results (OCPR). For this purpose, a Project Management Office (PMO) assumes responsibility for coordinating and promoting OCPR development throughout the entire organization. It integrates insights from project, program, and portfolio performance with organizational strategy, governance, and competence development. The organization ensures that learning, standards, and improvement initiatives are aligned and applied consistently. Through strategic support and coordination, the organization strengthens its capability to deliver projects that achieve intended results and strategic outcomes.

Measures
- Assign responsibility for coordinating the OCPR development across the entire organization to a PMO.
- Integrate performance data, lessons learned, and capability assessments to inform OCPR development initiatives.
- Develop and maintain organizational standards, frameworks, and guidance that support OCPR.
- Facilitate cross-organizational learning and knowledge sharing related to project delivery and results.
- Monitor and enhance OCPR development activities based on performance, strategic priorities, and feedback.

4.3.7. Results Assurance Competence

Definition
Results Assurance Competence is the organizational capability to systematically register, monitor, predict, confirm, and use the results (outputs, outcomes, benefits, value, and impact) delivered by projects, programs, and portfolios (PPP). It provides unbiased and appropriately objective confidence that committed results are achieved, transitioned, utilized, or maintained across the organization.

Purpose
The purpose of Results Assurance Competence is to ensure that the organization consistently achieves the intended results of its PPP investments, beyond the delivery of outputs. It provides a structured

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approach to tracking committed results, anticipating achievement risks, and enabling timely corrective actions. By confirming results and capturing learning, the organization strengthens accountability, development, and continuous improvement. This competence also ensures that delivered results are effectively transitioned into operations, utilized by stakeholders, or sustained over time, thereby maximizing strategic impact.

Description
An organization with well-developed Results Assurance Competence establishes clear practices for registering committed results and expected benefits at project, program, and portfolio levels. These results are systematically monitored using defined indicators to track progress and emerging risks to achievement. The organization applies predictive methods to assess the likelihood of achieving committed results and to recommend both preventive and corrective actions where necessary. Upon completion, results are confirmed and validated, and relevant lessons are captured and fed back into organizational practices. The organization ensures that PPP results are systematically transitioned, utilized, or sustained through defined handover, adoption, and sustainment arrangements. Through these practices, the organization ensures that PPP deliver measurable, lasting results aligned with strategic objectives.

4.3.7.1. Register and monitor committed PPP results

Description
This Key Competence Indicator assesses the organization's capability to systematically register and monitor the results committed by projects, programs, and portfolios (PPP). The organization establishes a common approach for defining, documenting, and monitoring committed results across PPP. Results are linked to strategic objectives and are supported by measurable indicators and clear targets. Monitoring practices provide ongoing visibility into progress toward result achievement and emerging risks. Through consistent registration and monitoring of committed results, the organization strengthens transparency, accountability, and results-focused delivery.

Measures

- Establish organizational standards for registering committed PPP results.
- Ensure committed PPP results are linked to strategic objectives, measurable indicators, and clear targets.
- Maintain a central or coordinated register of committed PPP results.
- Monitor progress toward committed PPP results using defined indicators and reporting practices.
- Review and update registered results and monitoring data in response to approved changes or emerging insights.

4.3.7.2. Predict achievement of PPP results and recommend corrective actions

Description

This Key Competence Indicator assesses the organization's capability to anticipate the likelihood of achieving committed results from projects, programs, and portfolios (PPP). The organization applies predictive approaches to analyze performance trends, risks, assumptions, and dependencies that affect the achievement of results. Insights from prediction activities are used to identify potential shortfalls or opportunities early. The organization formulates and communicates evidence-based recommendations for preventive or corrective actions. Through systematic prediction and proactive intervention, the organization improves the reliability of results delivery and reduces the risk of deviations.

Measures

- Apply predictive methods to assess the likelihood of achieving committed PPP results.
- Analyze trends, risks, assumptions, and interdependencies affecting the achievement of PPP results.
- Identify early warning indicators for potential deviations from expected results.
- Develop and communicate recommendations for corrective or preventive actions.
- Review the effectiveness of predictions and corrective actions to improve results assurance practices.

4.3.7.3. Confirm achievement of PPP results and capture learnings

Description

This Key Competence Indicator assesses the organization's capability to formally confirm the achievement of committed results delivered by projects,

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programs, and portfolios (PPP) and to systematically capture relevant learnings. The organization establishes clear criteria and processes for validating whether results have been achieved as intended. Confirmation activities ensure objectivity, transparency, and consistency across PPP. Lessons learned from results achievement or shortfalls are identified and documented. Through structured learning capture, the organization strengthens accountability and continuously improves its capability to deliver results.

Measures

- Define organizational criteria and processes for confirming the achievement of committed PPP results.
- Validate results using agreed indicators, evidence, and acceptance criteria.
- Document confirmed results and any deviations from expected outcomes.
- Capture lessons learned related to results achievement, shortfalls, and contributing factors.
- Integrate captured learnings into organizational standards, guidance, and improvement initiatives.

4.3.7.4. Ensure transition, utilization, or sustainment of PPP results

Description

This Key Competence Indicator assesses the organization's capability to ensure that results delivered by projects, programs, and portfolios (PPP) are effectively transitioned, utilized, or sustained to meet the strategic objectives. The organization establishes practices that support, for example, the handover of results to operations, user adoption, and long-term sustainment as required. Responsibilities for transition and utilization are clarified and supported by appropriate arrangements. The organization monitors post-delivery use and performance of results to confirm continued value. Through systematic transition, utilization, and sustainment, the organization ensures that PPP results deliver lasting benefits beyond completion.

Measures

- Define organizational practices for transitioning PPP results to operations, partners, or any ongoing use.
- Ensure that utilization and sustainment requirements are identified and addressed early.
- Establish arrangements to support change and adoption, ownership, and ongoing performance of results.
- Monitor post-transition utilization and value realization of PPP results.
- Capture feedback and lessons learned from transition and sustainment to improve future results delivery.

4.3.8. Functional Competence

Definition

Functional competence is the organizational capability to integrate the functions required to deliver projects, programs, and portfolios (PPP), thereby ensuring the achievement of intended results.

Purpose

The purpose of Functional Competence is to provide a common functional foundation that supports reliable and results-oriented delivery of PPP. It ensures that essential functions, such as direction & control, value creation, sourcing, coordination & integration, communication & relationship management, and monitoring, learning & adaptation, are systematically applied across the organization. By strengthening Functional Competence, the organization enhances coherence, efficiency, and adaptability in how PPP are managed and how results are achieved and sustained.

Description

An organization with well-developed Functional Competence establishes and applies consistent practices for **direction & control**, ensuring that objectives are clear, priorities are set, and activities are guided and regulated in line with strategic intent. It focuses on **value creation** by defining expected benefits, outcomes, values, and impact with SMART criteria and by aligning efforts to maximize organizational and stakeholder value. Through effective **sourcing**, the organization plans, allocates, and optimizes all necessary resources across PPP. **Coordination & integration** practices enable alignment across organizational units, disciplines, and delivery components, reducing fragmentation and interdependencies. **Communication & relationship management** ensure that information flows, collaboration occurs, and stakeholder engagement supports the effective delivery and acceptance of

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results. Finally, **monitoring, learning, and adaptation** provide the mechanisms to assess performance, capture insights, and adjust practices, enabling continuous improvement and resilience in delivering PPP with results.

4.3.8.1. Integrate 'Direction & Control' functions

Description
This Key Competence Indicator assesses the organization's capability to integrate '*Direction & Control*' functions, such as an organization's governance, risk management, legal, compliance, corporate sustainability, foresight, and business development functions, into the delivery of projects, programs, and portfolios (PPP). The organization establishes mechanisms to ensure that these functions provide constraints, guidance, support, and oversight aligned with strategic objectives and delivery needs. Furthermore, the '*Direction & Control*' functions contribute to setting boundaries, managing uncertainty, and ensuring compliance with internal and external requirements. Their integration supports informed decision-making and consistent application of organizational policies across PPP. Through systematic integration, the organization ensures that project delivery is guided, controlled, and aligned with long-term organizational interests.

Measures
- Identify and define relevant '*Direction & Control*' functions to be integrated into PPP delivery.
- Establish organizational mechanisms for involving '*Direction & Control*' functions in PPP planning and execution.
- Ensure alignment of governance, risk, legal, compliance, foresight, and business development inputs with delivery objectives.
- Provide clear interfaces and information flows between '*Direction & Control*' functions and PPP delivery activities.
- Review and improve the effectiveness of '*Direction & Control*' integration based on delivery results and performance.

4.3.8.2. Integrate 'Value Creation' functions

Description
This Key Competence Indicator assesses the organization's capability to integrate '*Value Creation*' functions, such as product management, research and development (R&D), manufacturing, logistics, and service delivery, into the delivery of projects, programs, and portfolios (PPP). The organization ensures that the functions responsible for creating its primary outputs are actively involved throughout the PPP life cycle. Integration enables

alignment between strategic intent, solution design, delivery execution, and operational outcomes. Value Creation functions contribute domain expertise, quality standards, and operational feasibility to PPP. Through systematic integration, the organization ensures that PPP deliver results that are usable, scalable, and capable of generating intended value.

Measures

- Identify '*Value Creation*' functions relevant to different types of projects, programs, and portfolios.
- Establish organizational mechanisms for involving '*Value Creation*' functions in PPP design and delivery.
- Ensure alignment between PPP objectives and '*Value Creation*' requirements, such as product, quality, and operational standards.
- Provide structured interfaces and collaboration practices between PPP delivery and '*Value Creation*' functions.
- Review and improve integration practices based on delivered results, operational performance, and stakeholder feedback.

4.3.8.3. Integrate 'Sourcing' functions

Description

This Key Competence Indicator assesses the organization's capability to integrate '*Sourcing*' functions, such as Human Resources (HR), finance, asset management, procurement, supply chain management, and IT infrastructure, into the delivery of projects, programs, and portfolios (PPPs). The organization ensures that the functions responsible for providing financial, human, material, and technological resources align with PPP needs and delivery timelines. Integration supports effective planning, resource availability, and resource optimization across PPP. Sourcing functions contribute policies, constraints, and expertise that influence feasibility, cost, and risk. Through systematic integration, the organization ensures that PPP are adequately resourced and capable of delivering intended results.

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Measures

- Identify '*Sourcing*' functions relevant to different types of projects, programs, and portfolios.
- Establish organizational mechanisms for involving '*Sourcing*' functions in PPP planning and delivery.
- Ensure alignment between PPP requirements and sourcing policies, budgets, and capacity constraints.
- Provide structured interfaces and coordination practices between PPP delivery and '*Sourcing*' functions.
- Review and improve sourcing integration practices based on resource utilization, cost performance, and delivery outcomes.

4.3.8.4. Integrate 'Coordination & Integration' functions

Description

This Key Competence Indicator assesses the organization's capability to integrate '*Coordination & Integration*' functions, such as operational planning, systems engineering, solution architecture, process management, and continuous improvement, into the delivery of PPP. The organization ensures that these functions align components, interfaces, and processes across organizational units and delivery domains. Integration supports coherence between strategy, solution design, implementation, and operations. '*Coordination & Integration*' functions provide frameworks, models, and methods that reduce fragmentation and manage complexity. Through systematic integration, the organization ensures that PPP results are consistent, interoperable, and fit for their intended use.

Measures

- Identify '*Coordination & Integration*' functions relevant to different types of projects, programs, and portfolios.
- Establish organizational mechanisms for involving these functions in PPP design and delivery activities.
- Ensure alignment of solutions, processes, and interfaces across organizational units and delivery components.
- Provide structured coordination practices and integration artifacts (e.g. architecture, plans, process models).
- Review and improve coordination and integration practices based on delivery outcomes and organizational learning.

4.3.8.5. Integrate 'Communication & Relationship Management' functions

Description

This Key Competence Indicator assesses the organization's capability to integrate '*Communication & Relationship Management*' functions, such as Public Relations (PR), marketing & communication, sales, stakeholder & partner management, and customer support, into the delivery of projects, programs, and portfolios (PPP). The organization ensures that communication objectives, messaging, and relationship considerations are aligned with PPP objectives and delivery phases. Integration supports consistent stakeholder engagement, expectation management, and acceptance of results. '*Communication & Relationship Management*' functions contribute market insight, stakeholder intelligence, and customer perspectives to PPP. Through systematic integration, the organization enhances trust, alignment, and the effective utilization of delivered results.

Measures

- Identify '*Communication & Relationship Management*' functions relevant to different types of projects, programs, and portfolios.
- Establish organizational mechanisms for involving these functions in PPP planning and delivery.
- Align communication and stakeholder engagement activities with PPP objectives and milestones.
- Provide structured interfaces and coordination practices between PPP delivery and communication functions.
- Review and improve communication and relationship integration based on stakeholder feedback and results utilization.

4.3.8.6. Integrate 'Monitoring, Learning & Adaptation' functions

Description

This Key Competence Indicator assesses the organization's capability to integrate '*Monitoring, Learning, & Adaptation*' functions, such as performance management, controlling, quality management, audit, knowledge management, training, organizational development, and change management, into the delivery of projects, programs, and portfolios (PPP). The organization ensures that performance information, quality insights, and learning are systematically captured and applied. Integration supports evidence-based decision-making, continuous improvement, and adaptive capability. '*Monitoring, Learning, & Adaptation*' functions provide feedback loops that connect delivery performance with competence development and

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organizational change. Through systematic integration, the organization enhances resilience and its capability to deliver and maintain results.

Measures

- Identify '*Monitoring, Learning & Adaptation*' functions relevant to different types of projects, programs, and portfolios.
- Establish organizational mechanisms for involving these functions in PPP monitoring and improvement activities.
- Ensure systematic collection, analysis, and dissemination of performance, quality, and learning data.
- Integrate lessons learned and improvement actions into organizational standards, training, and change initiatives.
- Review and improve integration practices based on performance trends, audit findings, and organizational learning outcomes.

4.3.9. Enabling Competence

Definition

Enabling Competence is the organizational capability to establish, maintain, and develop enablers, such as assets, people, culture, leadership, digital capabilities, partnerships, and change competences, required to effectively deliver projects, programs, and portfolios (PPP) and achieve intended results.

Purpose

The purpose of Enabling Competence is to ensure that the organization provides the conditions and capabilities necessary for delivering PPP beyond formal management processes and structures. It focuses on securing and developing the essential resources, competences, and cultural elements that underpin effective delivery. By strengthening Enabling Competence, the organization increases its readiness, adaptability, and capacity to deliver projects with results in dynamic and complex environments.

Description

An organization with well-developed Enabling Competence ensures the availability and protection of **tangible and intangible assets**, such as financial resources, infrastructure, intellectual property, data, and organizational knowledge, required for PPP delivery. It ensures suitable **people's competences** by identifying, developing, and sustaining the competences needed across project-related roles. The organization actively fosters a **project-friendly culture and leadership** environment that supports collaboration, accountability, learning, and a results-oriented approach. It

establishes **organizational digital capabilities** for PPP, enabling effective and responsible use of digital tools, data, platforms, and technologies in planning, delivery, monitoring, and collaboration. The organization ensures the availability of **partner competences** by selecting, integrating, and managing external partners and suppliers as extensions of its delivery capability. Finally, it enables **change and transformation competences**, ensuring that the organization can absorb, adopt, and maintain change arising from PPP. Through these integrated enablers, the organization creates the conditions for consistent, resilient, and results-driven delivery of PPP.

4.3.9.1. Secure intangible & tangible assets for PPP

Description
This Key Competence Indicator assesses the organization's capability to secure, protect, and make available the tangible and intangible assets required for delivering projects, programs, and portfolios (PPP). These assets include but are not limited to financial resources, physical infrastructure, intellectual property, data, and organizational knowledge. The organization ensures that assets are planned, allocated, safeguarded, and governed in alignment with PPP needs and priorities. Asset availability and integrity are maintained throughout the life cycle of PPP. Through systematic asset management, the organization enables reliable delivery and protects long-term organizational value.

Measures
- Identify and document tangible and intangible assets required for different types of PPP.
- Ensure availability and allocation of financial resources and infrastructure aligned with the approved PPP.
- Establish practices to protect, manage, and develop intellectual property, data, and organizational knowledge.
- Integrate asset planning and management with PPP planning and delivery activities.
- Review and improve asset security and availability based on delivery outcomes and organizational needs.

4.3.9.2. Ensure suitable people's competences

Description
This Key Competence Indicator assesses the organization's capability to ensure that people involved in projects, programs, and portfolios (PPP) possess and progressively develop the competences required to deliver

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results. The organization systematically assesses current competence levels and identifies gaps in relation to existing and anticipated PPP needs (e.g. using the individual competences outlined in the IPMA ICB®). Competence gaps are addressed by acquiring qualified internal or external resources or by structured competence development. Training, continued professional development, and certification are aligned with defined professional career paths. Through an integrated approach to competence assessment and development, the organization builds a sustainable and future-oriented PPP delivery capability.

Measures

- Assess current competence levels and identify gaps relative to current and future PPP requirements.
- Define competence profiles and professional career paths for roles involved in projects, programs, and portfolios.
- Acquire resources with the required competences where gaps cannot be met through internal development.
- Provide structured training, development, mentoring, and certification aligned with career paths.
- Monitor competence progression and adjust development initiatives based on delivery performance and evolving needs.

4.3.9.3. Create a project-friendly culture & leadership

Description

This Key Competence Indicator assesses the organization's capability to foster a culture and leadership environment that supports the delivery of projects with results. The organization and its leadership promote projects as key vehicles for achieving strategic and operational results. Leadership practices empower individuals and teams involved in project delivery and support accountability and decision-making. Collaboration, teamwork, and mutually beneficial relationships are actively encouraged across organizational boundaries. The organization also supports flexibility, agility, and openness to change, enabling projects to adapt and deliver results in dynamic environments.

Measures

- Promote projects as strategic instruments for delivering organizational results and change.
- Establish leadership principles and behaviors that empower project teams and decision-makers.
- Encourage teamwork and collaboration across functions, units, and external partners.
- Support flexible and agile ways of working where appropriate in projects.
- Assess and improve organizational culture and leadership practices based on feedback and project delivery outcomes.

4.3.9.4. Establish organizational digital capability for delivering projects

Description

This Key Competence Indicator assesses the organization's capability to establish and maintain its digital capability as an enabler of delivering projects with results. It comprises the governance, data, platforms, tools, roles, responsibilities, and shared practices required to use digital technologies securely, ethically, and effectively for project delivery.

It extends beyond digital tools to the organization's capability to integrate digital technologies and Artificial Intelligence (AI) into planning, decision-making, collaboration, monitoring, and continuous improvement. The organization provides the standards, interoperability, cybersecurity, and competence development needed for systematic, reliable use at scale. It also ensures the responsible adoption of emerging technologies where they improve project performance and results.

Measures

- Define organizational digital capability requirements for project delivery based on strategy, governance, data, technology, and role requirements.
- Establish standards, methods, and development activities that build data literacy, digital collaboration, and effective use of shared digital tools.
- Enable secure, ethical, and responsible use of digital technologies through governance, cybersecurity, and clear accountabilities.
- Promote the purposeful use of digital tools, data, and emerging technologies to improve project performance and results.
- Monitor, review, and adapt organizational digital capability.

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4.3.9.5. Ensure availability of the partner competences for PPP

Description

This Key Competence Indicator assesses the organization's capability to ensure the availability and effective integration of partner competences required for delivering projects, programs, and portfolios (PPP). The organization engages, for example, with clients, contractors, service providers, and other parties as extensions of its delivery capability. Partner selection and engagement are aligned with delivery needs, risk profiles, and collaboration models such as Alliance Contracts, Public-Private-Partnership, Engineering, Procurement, and Construction Management (EPCM), or Integrated Project Delivery (IPD). The organization ensures that partner competences complement internal capabilities and support shared objectives. Through structured collaboration and competence integration, the organization strengthens delivery performance and achievement of results.

Measures

- Identify partner competences required to support different types of PPP.
- Select and engage partners using collaboration and contracting models aligned with delivery objectives.
- Ensure clarity of competence expectations and integration mechanisms for partners.
- Establish collaborative practices that enable effective knowledge sharing and joint problem-solving.
- Review partner performance and competence contribution to improve future collaboration and results.

4.3.9.6. Enable organizational change & transformation in the context of PPP

Description

This Key Competence Indicator assesses the organization's capability to enable and maintain organizational change & transformation through projects, programs, and portfolios (PPP). The organization distinguishes between incremental change and fundamental transformation and applies appropriate approaches to each. Transformation initiatives are aligned with strategic objectives and may involve significant changes to strategy, structure, processes, technology, and culture, such as implementing a new target operating model. The organization provides leadership direction, clear communication, and active stakeholder engagement to support the adoption of change. By focusing on people, culture, and learning, the organization ensures agility, resilience, and long-term competitiveness.

Measures

- Define organizational approaches for managing incremental change and largescale transformation through PPP.
- Ensure leadership vision and strategic alignment for transformation initiatives.
- Establish structured communication and stakeholder engagement practices to support change adoption.
- Provide mechanisms to engage employees, address resistance, and build change capability.
- Monitor change outcomes and cultural impacts to improve organizational agility and competitiveness.

4.3.10. Alignment Competence

Definition

Alignment Competence is the organizational capability to systematically align functions, units, and stakeholders around a shared vision, purpose, and objectives, and to maintain coherent structures, responsibilities, and performance mechanisms that enable the effective delivery of projects, programs, and portfolios (PPP).

Purpose

The purpose of Alignment Competence is to ensure that the organization operates as a coordinated and coherent system when delivering PPP. It reduces fragmentation, conflicting priorities, and inefficiencies arising from misaligned objectives, structures, or responsibilities. By strengthening Alignment Competence, the organization ensures that strategic intent is consistently translated into coordinated action and that all contributing functions and units work toward common results.

Description

An organization with well-developed Alignment Competence establishes and communicates a shared vision, purpose, and objectives that guide the delivery of projects, programs, and portfolios. Strategic and operational goals are consistently cascaded and understood across organizational functions and units. The organization creates clear structural and procedural interfaces that define how functions interact, exchange information, and coordinate decisions in the context of PPP delivery. Reciprocal responsibilities, authorities, and accountabilities are explicitly agreed upon, ensuring clarity of contribution and decision-making without overlap or gaps. Alignment is actively monitored and controlled through defined performance indicators,

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feedback mechanisms, and reviews, enabling timely correction of misalignment. Through these integrated practices, the organization sustains coherence, accountability, and performance in delivering PPP with results.

4.3.10.1. Establish shared vision, purpose, and objectives

Description
This Key Competence Indicator assesses the organization's capability to establish and maintain a shared vision, purpose, and objectives among those involved in delivering projects with results. The parties agree on a common understanding of why projects are undertaken, how they are delivered, and by whom, and what results they are expected to achieve. This shared direction is consistently cascaded across organizational units and functions involved in project delivery. The organization actively reinforces understanding, commitment, and buy-in among all those contributing to the projects. Through a shared vision and aligned objectives, the organization strengthens coherence, motivation, and collective ownership of project results.

Measures
- Define and document the shared vision, purpose, and objectives for delivering projects.
- Cascade the shared vision and objectives across organizational units and functions involved in project delivery.
- Align project-related objectives with organizational strategy and operational priorities.
- Communicate and reinforce the shared vision and objectives through leadership actions and engagement practices.
- Assess and improve stakeholder understanding and buy-in based on feedback and delivery outcomes.

4.3.10.2. Design clear structural and procedural interfaces

Description
This Key Competence Indicator assesses the organization's capability to design and maintain clear structural and procedural interfaces that support effective delivery of projects with results. The organization synchronizes processes and integrates organizational interfaces to enable smooth coordination across functions and units. Interfaces are designed to ensure clarity in information flow, decision points, and handovers. Well-integrated interfaces reduce friction, duplication, and delivery delays. Through consistent and purposeful interface design, the organization focuses all involved on delivery performance and achieving expected results.

Measures

- Design and document standard organizational interfaces supporting project delivery.
- Synchronize relevant organizational processes to ensure effective interaction across interfaces.
- Define clear information flows, decision points, and handover mechanisms at interfaces.
- Ensure interface design supports focus on delivery performance and results.
- Review and improve interfaces based on delivery performance and operational feedback.

4.3.10.3. Agree on reciprocal responsibilities, authorities, and accountabilities

Description

This Key Competence Indicator assesses the organization's capability to agree on and maintain clear reciprocal responsibilities, authorities, and accountabilities for delivering projects with results. The organization establishes harmonized responsibility matrices, such as RASIC, to clarify contributions and interactions across functions and roles. Delegation of Authority (DoA), mandates, and role-specific charters define decision rights and accountability boundaries. Clear agreements reduce ambiguity, overlap, and gaps in responsibility. Through consistent definition and application of responsibilities and authorities, the organization strengthens accountability, decision-making effectiveness, and delivery performance.

Measures

- Define and harmonize responsibility matrices (e.g., RASIC) across organizational units involved in project delivery.
- Establish and transparently communicate the Delegation of Authority (DoA) applicable to project-related decisions.
- Define mandates and role-specific charters that clarify responsibilities and accountabilities.
- Ensure consistency of responsibilities and authorities across organizational interfaces.
- Review and refine responsibility and authority arrangements based on delivery results and feedback.

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4.3.10.4. Monitor and control the alignment with its performance

Description
This Key Competence Indicator assesses the organization's capability to monitor and control the alignment of organizational units, functions, and those involved with delivery performance and results. The organization defines indicators that reflect both alignment and performance in project delivery. Monitoring practices provide visibility into how well objectives, responsibilities, and interfaces remain aligned during execution. Deviations from agreed alignment are identified and addressed in a timely manner. Through systematic monitoring and corrective action, the organization sustains coherent, coordinated, and results-focused delivery.

Measures
- Define indicators to monitor alignment between organizational objectives, interfaces, and delivery performance.
- Establish regular monitoring and reporting practices for alignment and performance.
- Identify and analyze deviations or misalignments affecting the delivery of results.
- Implement corrective actions to restore or improve alignment.
- Review alignment performance to drive continuous improvement of organizational coordination and delivery effectiveness.

4.4. Interactions among the competences and key contextual factors

Since projects are the key to executing the strategy and achieving results, the main interaction chain starts with the strategy, continues through the competences relevant to governing, managing, and supporting projects, programs, and portfolios, and ultimately leads to results. Of course, the individual competences along this 'value stream' interact with each other. Similarly, the interaction is by no means one-way; there is mutual feedback on performance, results, and potential areas for improvement. This interaction connects permanent and temporary organizational structures and therefore requires strong alignment (which is ensured by means of alignment competence).

Ultimately, in addition to the individual feedback loops among the competences, there is a general feedback loop that provides input to

preceding competences based on the evaluation of results, thereby identifying potential for improvement or adjustment. However, not all interactions between the competences are shown in detail in Figure 12 for clarity.

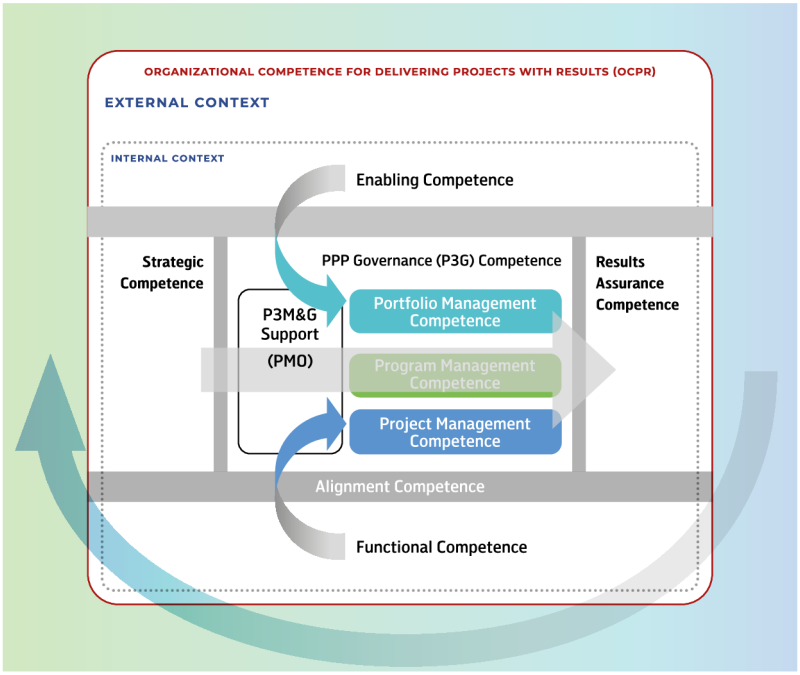


Figure 12: Interactions among competences and contextual factors

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5. Development of organizational competence

Organizations are subject to constant change. Change can be caused by external factors, such as new technologies, economic cycles, or disruption, as well as internal factors, such as new products or services, transformation initiatives, or organizational restructuring. All changes require a response from the organization to ensure longevity and success. An organization is considered successful if it achieves its strategic objectives sustainably for the benefit of all stakeholders. Viewing an organization as a social system with evolutionary development processes, similar to those found in nature, is a useful approach to explaining organizational development. According to evolutionary theory, natural selection drives development in nature. In the long term, only those organisms that can adapt to their environment survive. The same principles can also be applied to organizations, which must constantly adapt to changing circumstances. Only organizations that adapt to change by finding solutions to new challenges survive in the long term. These solutions must work in their respective contexts and with the available resources. Organizations should therefore regularly assess their situation and environment, identify relevant trends, and adapt their strategies, processes, structures, culture, competences, and more accordingly. The main task of senior executives, especially in project-oriented organizations, is to anticipate and respond to environmental changes and implement appropriate measures to enhance organizational competence for delivering projects with results in collaboration with the leadership team, responsible managers, and employees.

This chapter outlines the development of organizational competence for delivering projects with results (OCPR). It explores the relationship between the IPMA OCB® and IPMA Delta®, an approach used by IPMA through its Certification Bodies (CBs) to assess an organization's state of development in terms of OCPR and to suggest appropriate development opportunities. However, there may also be other assessment approaches that serve the same purpose or, in addition to IPMA Delta®, focus on deepening a specific area. Both IPMA OCB® and IPMA Delta® are based on the concept of competences. They were developed to provide organizations with an

understanding of organizational competence in delivering projects with results. They offer the means to support the development of an organization's competence in a holistic and sustainable way. IPMA Delta® assesses an organization's competence in delivering projects with results based on five competence classes, which correspond to development stages. The classification system and its individual classes are described in 5.1. The approach used by IPMA Delta® to assess an organization's competence for delivering projects with results is outlined in 5.2. Suitable approaches for developing organizational competence are discussed in 5.3, which also addresses innovation and organizational learning. Finally, 5.4 explains why it can be worthwhile to use external consulting services and how these can ideally be combined with the organization's own development activities.

5.1. Organizational competence development and classification

This chapter describes a staged model for developing organizational competence. It outlines five competence classes, ranging from *Initial to Optimizing*, and explains how organizations typically progress between these classes (see Figure 13). Furthermore, it clarifies that competence development is not linear or uniform but depends on contextual factors, including the organization's overall competence state, strategic objectives, and both internal and external requirements.

The intent is to provide guidance rather than a prescription. The competence classes should therefore not be understood as the final goal of development. Rather, they serve as a reference for assessing the reliability with which organizational systems, structures, and practices produce intended results. Organizations may use the competence classes to assess their current capability and to plan targeted, context-appropriate improvement initiatives. However, improvement priorities should be determined primarily by their expected impact on results, not by the ambition to advance to a higher competence class alone. Each class reflects the extent to which project results can be reliably attributed to organizational systems, structures, and practices rather than to individual effort. In this sense, class advancement is meaningful only when it strengthens the organization's ability to achieve relevant, sustainable, and repeatable results.

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Figure 13: Classification of Organizational Competence

Class 1: Initial

At the *Initial* level, projects are primarily delivered based on the competence, commitment, and experience of individuals. While some projects may achieve their intended results, success is inconsistent and largely dependent on these individuals. There is little or no shared organizational understanding of how projects should be delivered. Processes, roles, and governance arrangements are informal or ad hoc. Lessons learned are rarely captured or transferred. As a result, outcomes are unpredictable, and organizational learning is limited.

Class 2: Defined

At the *Defined* level, organizational competence begins to evolve. Basic standards, guidelines, or methodologies for delivering projects are partially defined and introduced. These may include templates, role descriptions, or high-level governance rules. However, these standards are not yet fully embedded in the organization. The application is inconsistent, and compliance often depends on local initiative rather than on organizational expectations. While repeatability improves compared to Class 1, results are still variable, and organizational competence remains fragile.

Class 3: Standardized

At the *Standardized* level, organizational competence is already well developed. The organization has established a coherent and comprehensive set of standards for delivering projects, programs, and portfolios. These standards are aligned with each other and with the organization's governance framework. The standards are applied across most of the organization, supported by defined roles, decision-making structures, and competence development mechanisms. Project results are increasingly predictable, and performance can be attributed to organizational capability rather than individual effort.

Class 4: Managed

At the *Managed* level, organizational competence is highly developed and proactively governed. Standards for delivering projects, programs, and portfolios are fully applied and systematically monitored. Performance data are collected, analyzed, and used to control outcomes and manage risks. Management attention extends beyond compliance to effectiveness and efficiency. Deviations are identified early, corrective actions are taken, and accountability for results is clearly assigned. The delivery of projects with results consistently contributes to organizational objectives

Class 5: Optimizing

At the *Optimizing* level, organizational competence is continuously improved and dynamically adapted. The organization systematically evaluates and enhances its project delivery capability in response to changing strategic priorities, environmental conditions, and stakeholder expectations. Innovation, learning, and adaptability are embedded in governance, leadership, and culture. Organizational competence for delivering projects becomes a source of strategic agility, enabling the organization to respond effectively to complexity and change.

Progression between competence classes represents a shift from individual-based performance to organizationally enabled and strategically integrated capability. Each transition typically requires focused effort in several dimensions, including governance, processes, people, and culture. The following information is intended merely as a point of reference and should not be considered a cookbook or a recipe to be applied.

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From Initial to Defined

To move from *Initial* to *Defined*, an organization must reduce reliance on individual heroics by establishing basic, shared expectations for project delivery.

Key actions typically include:

- Defining a common vocabulary and basic project delivery principles.
- Introducing initial standards, templates, and role descriptions.
- Clarifying minimal governance arrangements, such as decision rights and escalation paths.
- Creating awareness of the value of consistency and organizational learning.

The emphasis at this stage is on visibility and alignment rather than optimization.

From Defined to Standardized

Progression from *Defined* to *Standardized* requires consolidation and integration.

Organizations typically focus on:

- Harmonizing project-related standards across departments and functions.
- Embedding standards into governance structures and management processes.
- Establishing competence development pathways for project-related roles.
- Creating mechanisms for capturing and reusing lessons learned.

At this stage, leadership commitment is critical to ensure that standards are applied consistently and perceived as enabling rather than bureaucratic.

From Standardized to Managed

Moving from *Standardized* to *Managed* involves shifting from application to active control.

Key development actions include:

- Defining key performance indicators for project, program, and portfolio delivery.
- Establishing regular monitoring, reporting, and review cycles.
- Integrating performance management and results assurance for projects with organizational performance management.
- Strengthening accountability for results at all relevant management levels.

The organization begins to manage project delivery as a core capability.

From Managed to Optimizing

The transition from *Managed* to *Optimizing* requires a strategic and adaptive perspective.

Typical actions include:

- Systematically evaluating the effectiveness of standards and governance arrangements.
- Encouraging experimentation and innovation in project delivery approaches.
- Using data and insights to anticipate change rather than merely respond to it.
- Aligning continuous improvement initiatives with long-term strategic objectives.

At this level, improvement is proactive, not reactive.

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As mentioned above, the development of organizational competence for delivering projects with results does not follow a single, uniform path. The appropriate pace, scope, and form of development depend on multiple contextual factors, such as:

- The organization's overall development and management competence.
- Strategic objectives and the role of projects in achieving them.
- Organizational size, structure, and geographic distribution.
- Industry characteristics, regulatory requirements, and stakeholder expectations.
- Cultural factors, including attitudes toward governance, authority, and learning.

Consequently, organizations may intentionally operate at different competence classes in different parts of the organization or for different types of projects. Advancement should therefore be guided by strategic relevance and value contribution rather than by the pursuit of a higher class for its own sake.

5.2. Organizational competence assessment

Assessing organizational competence for delivering projects with results enables an organization to understand how effectively its structures, processes, governance, and culture support the delivery performance and the achievement of intended results. Such assessments provide transparency regarding strengths, weaknesses, and improvement potential, and form a sound basis for evidence-based development decisions. The following describes how an organization can assess its competence using a structured approach, exemplified by the IPMA Delta® Assessment. It outlines the key steps to prepare, scope, and conduct an assessment, describes typical benefits and outcomes, and identifies alternative or complementary approaches to assessment. The IPMA Delta® Assessment is an internationally recognized framework for assessing organizational competence for delivering projects with results. It evaluates competence across multiple dimensions, typically including governance, structures, processes, people, culture, and results orientation. While IPMA Delta® is used here as an example, the principles described in this chapter are applicable to any structured, evidence-based assessment approach that holistically and systematically evaluates organizational competence.

Preparing an Organizational Competence Assessment

Effective assessment requires careful preparation to ensure relevance, credibility, and acceptance of results. Before initiating an assessment, the organization should clearly define its objectives. Typical objectives include:

- Understanding the current level of organizational competence.
- Identifying strengths and areas for improvement.
- Supporting strategic decision-making and transformation initiatives.
- Establishing a baseline for continuous improvement or benchmarking.
- Demonstrating organizational competence through a third-party certificate.

Clear objectives guide the design, scope, and depth of the assessment.

Before anything else, it is important to ensure that senior executive sponsorship is in place. Leadership commitment ensures access to information, the availability of key stakeholders, and organizational acceptance of findings. Without visible support, assessments risk being perceived as compliance exercises rather than advancement.

Another important factor is to select an assessment approach that is appropriate to the organization's context and objectives. When using an external framework such as IPMA Delta®, consideration should be given to:

- The suitability of the assessment approach to the specific needs of the organization (i.e., assessing processes compared to organizational competence).
- The effort involved in the assessment process in relation to the results obtained and the insights gained.
- The credibility of the assessment provider (i.e., using an accredited certification body compared to a consultancy with vested interests).
- The competence and independence of assessors (i.e., gaining sector-specific insights compared with new impulses from other perspectives).
- The balance between external objectivity and internal knowledge.

Scoping the Assessment

Scoping defines what will be assessed and to what depth. The assessment scope may cover the entire organization, selected organizational units, divisions, or project-specific organizations. The assessment of individual projects or programs is not the focus of IPMA OCB® and IPMA Delta®. There

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are special assessment approaches for this, such as a review using the Project Excellence approach outlined in the IPMA Project Excellence Baseline (IPMA PEB®). The scope should reflect strategic priorities and the role of projects, programs, and portfolios for delivering the organization´s strategy.

The assessment with IPMA Delta® typically focuses on the project-oriented part of an organization, while also considering interactions with other parts of the embedding organization and with external partners actively involved in project delivery. Unlike other internationally available assessment approaches, IPMA Delta® covers more than just the processes, practices, and methods of project, program, and portfolio management. It includes the entire scope of Organizational Competence for delivering Projects with Results (OCPR), as shown in Figure 11. Should a section of the OCPR be irrelevant to project delivery (e.g. partner competences, if no partners are involved in practice), this section can, of course, be excluded from the assessment scope. IPMA Delta® uses the 'triangulation' method (see Figure 14) to compare the results of the organizational-level assessment with the individual competence of selected project and program managers and the application of management competence in selected projects and programs. This goes significantly beyond conventional assessment models, which focus solely on the availability of standards. Triangulation generally provides confirmation of findings, more comprehensive data, greater validity, and a deeper understanding of the status quo.



Figure 14: Triangulation of assessment perspectives

The Key Competence Indicators (KCIs) described in the IPMA OCB®, together with their measures, can be used to assess organizational competence for delivering projects with results. These offer a contemporary, comprehensive, and consistent approach and can be evaluated using the following evidence:

- Documented policies, standards, etc.
- Project documentation, plans, and reports.
- Data, learning, and insights on performance and results.
- Interviews with key stakeholders across the organization.
- Observations of practices and behaviors.

Conducting the Assessment

Assessment data are typically collected using a combination of semi-structured interviews, self-assessments, surveys, document checks, and facilitated discussions. Using multiple methods increases reliability and reduces bias.

Collected data are analyzed against the selected assessment framework.

In the case of IPMA Delta®, this includes evaluating competence classes and identifying patterns across the competences outlined in the IPMA OCB®, with the strengths and development areas. The assessment distinguishes between formal arrangements (what is standardized), actual practice (what is applied), and management oversight (what is controlled). Each aspect is checked several times and then reconfirmed using the aforementioned triangulation method. Preliminary findings should be validated with key stakeholders to ensure accuracy and shared understanding. This step also supports organizational learning and buy-in, and prepares the organization for development.

Benefits and Outcomes of an Assessment

A well-conducted assessment of organizational competence offers a multitude of benefits. The assessment, together with a corresponding results report, provides a fact-based view of how project delivery is enabled and constrained within the organization, thus creating a common language for further discussion of the topic. Senior Executives gain clarity on what is working well, where best practices may already exist within the organization, and where targeted improvements will yield the greatest benefit. The recommendations resulting from the assessment provide clear guidance on how to further develop the organizational competence to deliver projects

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with results, thereby supporting the strategic objectives and achieving the required results even more effectively. IPMA Delta® goes beyond the recommendations and offers an additional roadmap for developing organizational competence, while quickly initiating targeted activities.

Alternatives and Complementary Approaches

While comprehensive assessments such as IPMA Delta® offer significant value, they are not the only means of assessing organizational competence. Internal self-assessments can serve as an initial alternative or as preparation for an external assessment. For example, organizations can use the IPMA OCB® to assess themselves, undergo benchmarking against the IPMA OCB® with other organizations by entering specific data on an online platform, or participate in a rigorous panel study. In all approaches, the participating companies assess their own competence; however, in the latter two cases, the evaluation and recommendations may be provided by external parties. While a self-assessment promotes reflection and learning, it can be subject to significant cognitive biases. If the organization is primarily interested in an independent assessment of its organizational competence for delivering projects with results instead of obtaining a certificate, the IPMA certification body or an accredited consultant may conduct an assessment with a limited scope ('*Delta Light*'). Participation in an IPMA OCB® information session, training, or coaching session may also benefit the organization.

Organizations may assess specific aspects, such as governance effectiveness, benefits realization, portfolio management capability, or the performance of a PMO, rather than conducting a full-scope assessment. As mentioned above, the scope of the assessment may also be limited to a single project or program. In these cases, it is important to either select a suitable framework (e.g. IPMA PEB®) for this limited scope or tailor it accordingly. Benchmarking against peer organizations or industry standards can complement formal assessments by providing external reference points. Finally, performance indicators, or assurance data, along with regular reviews or audits, can be used to continuously monitor organizational competence between formal assessments.

However, an assessment should not be treated as a one-time activity. To maximize value, organizations should integrate assessments into continuous improvement activities and strategic and operational planning, track progress against identified improvement actions, and periodically reassess to measure progress and adapt to change. In this way, organizational competence

assessment becomes an integral component of long-term competence development and performance improvement.

5.3. Organizational competence development

Organizational competence development for delivering projects with results shall be approached as a structured, continuous, and strategically aligned activity. The organization should establish a competence development plan aligned with its strategic objectives and the role that projects, programs, and portfolios play in achieving them. This plan should be informed by regular assessments of the current state of organizational competence, enabling the identification and prioritization of development areas based on evidence rather than opinion or assumption. Competence development initiatives should be deliberately initiated and governed, typically through dedicated projects or programs, with clear objectives, responsibilities, and results. A broad set of development approaches should be utilized, including but not limited to individual competence development (e.g. training, coaching, mentoring, certification, and career pathways), organizational competence development (e.g. governance arrangements, process and standard development, role clarification, and structural adjustments), cultural and behavioral development (e.g. leadership development, collaboration approaches, and learning culture), and system-level enablers (e.g. tools, data, and performance management mechanisms). Additional approaches may include peer exchange, communities of practice, knowledge management, change management, piloting and scaling new practices, external benchmarking, participating in IPMA or other professional association events, and targeted improvement initiatives for specific project, program, or portfolio contexts.

The IPMA PEB® can be used as a tool to support the development of an organization's competence in delivering projects with results. The IPMA PEB® provides a structured framework to measure and benchmark the performance of individual projects and to capture and analyze lessons learned. Systematic application of the IPMA PEB® within an organization to analyze the effectiveness of project implementation supports the continuous improvement of project management practices, enhances project leadership, and ensures the formation and strengthening of a culture of continuous development in projects and programs.

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Organizational competence development should be monitored and reviewed regularly to ensure sustained effectiveness, adaptability, and contribution to achieving strategic objectives and results.

5.4. Involvement of external consultants

The involvement of external consultants in the assessment or development of organizational competence for delivering projects with results should be purposedriven, transparent, and clearly governed. Prior to engagement, the organization should explicitly clarify the objectives of the involvement, the scope of work, the role and mandate of the external consultant, and the expected results.

Furthermore, the way of working should be defined in advance, including principles for collaboration, decision-making authority, knowledge transfer, and integration with internal roles and structures. In addition, clear requirements for coordination, communication, and reporting should be established to ensure alignment with organizational sponsorship and to enable effective oversight of progress, risks, and results. Aspects to be addressed may include confidentiality, independence, ethical standards, access to information, escalation mechanisms, and exit or handover arrangements to ensure sustainability beyond the engagement.

External consultants involved in organizational competence development should demonstrate competence in accordance with recognized professional standards, such as those outlined in the IPMA Individual Competence Baseline (ICB4) Reference Guide for Consultants, ensuring an appropriate balance of contextual, behavioral, and technical competences aligned with the organization's objectives and requirements.

The benefits of involving external consultants include access to specialized expertise, objective and independent perspectives, acceleration of competence development initiatives, and exposure to recognized good practices and benchmarks. Prerequisites for successful involvement include strong internal sponsorship, clarity of intent, availability of internal resources, and readiness for change. Potential threats include unclear mandates, dependency on external expertise, misalignment with organizational culture or strategy, insufficient knowledge transfer, and resistance from internal stakeholders if the engagement is not adequately communicated and managed.

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ANNEXES Annex 1: Changes from IPMA OCB 1.1 to IPMA OCB 2.0

From Organizational Capability to Demonstrable Results

Organizations today implement strategy primarily through projects, programs, and portfolios. As this '*projectification*' accelerates, organizational competence has become a decisive factor for strategic success. The IPMA OCB was created to explain how organizations enable project success at a systemic level.

What has changed is not the relevance of organizational competence, but the expectations placed upon it. Senior executives and boards are no longer satisfied with maturity descriptions, well-designed structures, or documented processes. Their question has fundamentally shifted: not '*How capable are we?*' – but '*What results do we deliver?*'

This shift in perspective is the central driver of the IPMA OCB refresh.

Maturity is no longer the outcome – results are

The refreshed IPMA OCB does not replace the existing logic of organizational competence. It redefines its purpose. Organizational competence is no longer positioned as an end state or a maturity level to be achieved. It is understood as a means to deliver demonstrable results. The focus moves decisively from capability descriptions to outputs, outcomes, benefits, value, and long term impact. This change reflects a simple reality: competence only matters if it makes a difference.

From capability orientation to results orientation

In the refreshed IPMA OCB, projects, programs, and portfolios are no longer viewed primarily as objects of control or optimization. They are treated as strategic instruments for delivering results. Organizational competence is therefore assessed by its ability to translate strategic intent into measurable

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and sustainable outcomes. The key question is no longer whether the '*right*' elements exist, but whether they work together to produce results.

From static maturity to dynamic capability

Traditional maturity models assume stability and progress toward a predefined target state. The refreshed IPMA OCB deliberately moves beyond this logic. Organizational competence is framed as a dynamic capability: the organization's ability to sense change, adapt priorities, reallocate investments, and continuously improve strategy implementation through projects. In volatile and complex environments, competence is not demonstrated by reaching a level, but by sustaining performance under changing conditions.

Creating a clear strategic line of sight

A central enhancement of the refreshed IPMA OCB is the explicit strategic line of sight it establishes. Strategy, governance, enabling capabilities, support functions, and project delivery are no longer described as separate domains. They are presented as an integrated system for results creation.

This logic is reflected in the model '*Organizational Competence for delivering Projects with Results (OCPR)*'. The OCPR model shows how strategic competence, portfolio, program, and project governance (P3G), and their management (P3M), together with relevant support, functional, and enabling competences, and results assurance, interact synergistically within the organization's internal and external context. Another key competence is alignment, or the organization's capability to consistently connect strategic objectives, governance decisions, and delivery execution toward measurable results. The model makes visible how organizational elements jointly produce outputs, outcomes, benefits, value, and long term impact.

Why this matters for executives

For senior executives and boards, the refreshed IPMA OCB significantly increases the relevance of decisions. It creates transparency on whether investments in projects and project related competences actually contribute to strategic success. It supports prioritization, governance, and resource allocation by linking strategic objectives directly to delivered results. Most importantly, it enables a different level of dialogue:

not about project maturity, but about strategic return on project investments.

Value for PMOs and transformation leaders

For PMOs, portfolio managers, and transformation leaders, the refreshed IPMA OCB provides a focused framework for impact-oriented improvement. It helps identify where organizational changes will have the greatest impact on results and provides a common language to communicate value in a way that resonates with executives.

What remains unique about IPMA OCB

The core strength of IPMA OCB remains unchanged – but becomes more explicit.

IPMA OCB is a unique standard that views the organization as a whole system for delivering projects. It integrates strategy, governance, management, support structures, enablers, and functional competences, while deliberately avoiding prescriptive '*how to*' solutions.

It explicitly distinguishes and connects outputs, outcomes, benefits, value, and impact, enabling context sensitive application across different organizational environments. Together with IPMA ICB and IPMA PEB, it ensures coherence from individual competence to organizational performance.

From reference to evidence: IPMA Delta and impact

The refreshed IPMA OCB reaches its full potential through IPMA Delta.

IPMA Delta operationalizes the IPMA OCB by transforming its reference logic into evidence-based insight. It does not assess competence for its own sake but examines whether organizational competence actually enables results and creates value. Together, IPMA OCB and IPMA Delta enable Delta Impact Value (DIV): the structured ability to demonstrate how organizational competence contributes to measurable results, benefits, and strategic impact. DIV emerges when assessments no longer end with maturity scores but lead to prioritized actions that improve real organizational performance.

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What has changed in the refreshed IPMA OCB?

- From capability orientation to results orientation
- From static maturity to dynamic capability
- From structural descriptions to strategic line of sight
- From assessment scores to demonstrable impact (via IPMA Delta)

Conclusion

The refreshed IPMA OCB is a clear reference for impact-oriented organizational development. It strengthens IPMA Delta as a value-focused assessment approach, provides a compelling narrative for executive engagement, and supports organizations in generating sustainable strategic value through projects.

Ultimately, the refreshed IPMA OCB responds to a simple but decisive expectation: Organizational competence matters only if it makes a difference.

IPMA

publication

ORGANIZATIONAL COMPETENCE BASELINE

FOR DELIVERING PROJECTS WITH RESULTS

Organizations of all sizes and across all sectors increasingly depend on projects, programs and portfolios to achieve their strategic objectives. An increasingly complex and dynamic environment requires organizations to align strategy, governance, leadership, structures, resources and culture to enable successful delivery and create value for their stakeholders.

The IPMA Organizational Competence Baseline, Version 2.0 (OCB2), provides a holistic framework for understanding, assessing and developing organizational competence in managing projects, programs and portfolios. It offers a common reference for organizations seeking to strengthen the conditions in which project-oriented work can succeed.

OCB2 builds on the established IPMA approach while strengthening the connection between organizational context, governance, leadership and project, program and portfolio performance. It places greater emphasis on creating an enabling environment in which people and teams can apply their competence, projects can deliver value, and strategic objectives can be achieved.

OCB2 offers insights for top managers, senior executives, project, program and portfolio leaders, functional managers, project professionals, consultants, educators, trainers and coaches. It supports organizations in understanding their current capabilities, identifying areas for development and continuously improving how they manage project, program and portfolio work.

Organizational competence is not simply about having the right structures or processes. It is about creating the conditions for people, projects and organizations to work together effectively and deliver sustainable results.

We wish all organizations using projects, programs and portfolios the clarity, capability and commitment to enable excellence, create value and achieve meaningful, sustainable results for their stakeholders.

ISBN 9789401815161



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