

## JEAN MONNET CHAIR – UNIVERSITY OF GRANADA

"PM<sup>2</sup> by European Commission. Open, free and common project management framework for all European institutions, companies and citizens. – PM<sup>2</sup>EU+"

### WHITE REPORT

#### PM<sup>2</sup> Talk – PM<sup>2</sup> follow-up meeting

27<sup>th</sup> September 2022

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## 1 INTRODUCTION

On Tuesday 27 September, a workshop was held among project management professionals from consulting companies, training companies and academia. All of them have participated in the Spanish translations of the PM<sup>2</sup> Guide and the PM<sup>2</sup> Agile Guide. The participants were:

- Juan Manuel Dominguez (APGP)
- Javier Pajares (Professor in Project Management at the University of Valladolid)
- Agustín Moya (PM<sup>2</sup> Alliance Member)
- Ángel Agueda (EvergreenPM - CEO)
- Begoña Moreno (University of Granada – Chair Holder)
- Germán Martínez (University of Granada – Chair Academic Coordinator)



Figure 1: Screenshot of the meeting (Google Meet)

The following sections summarise the main aspects that were dealt with and the recommendations made by this working group to continue with the continuous improvement of the PM<sup>2</sup> methodology framework.

## 2 SPANISH VERSIONS

The availability of the Spanish versions of the PM<sup>2</sup> programme and portfolio management guides is considered essential. It is considered absolutely necessary to have the Spanish versions of the PM<sup>2</sup> programme and portfolio management guides available. This will ensure a greater number of users and critical mass who, in addition to adding value to the existing knowledge, can make proposals for improvement by detecting what really works and what needs some kind of adaptation and/or modification.

To this end, the [European Commission's PM<sup>2</sup> Centre of Excellence - CopEPM2](#) will be ask for the possible support for these new translations.

### 3 PM<sup>2</sup> PROFESSIONAL CERTIFICATIONS

The current status of possible professional certification pathways (both within and outside the Commission) was reviewed. In recent months, the [OpenPM<sup>2</sup>group](#) has joined, offering a first level of certification (Foundation) and planning to offer a second level as the European Commission does (Practitioner).

We have been in contact with the promoters of OpenPM<sup>2</sup>Group and the underlying idea is to offer a model literally cloned from the one provided by the Commission for its staff, thus facilitating the global recognition of competencies.

A valuable fact of this initiative is that the certification process is carried out by a company accredited to ISO/IEC 17024:2012: Conformity assessment — General requirements for bodies operating certification of persons. This ensures that the certifier body meets the requirements of impartiality, consistency, comparability and reliability, providing the necessary guarantees for the certification process.

It was also reported that the European Commission has abandoned the possibility of outsourcing the certification process to any project professional from outside the Commission (after several difficulties in the procurement process). As a consequence, professional certification for any external EC worker will, to date, only be possible through the two private institutions that offer it: [PM<sup>2</sup> Alliance](#) (in this case certifications are available, at different levels, since 2018) and OpenPM<sup>2</sup>Group (which has started its business activity in 2022).

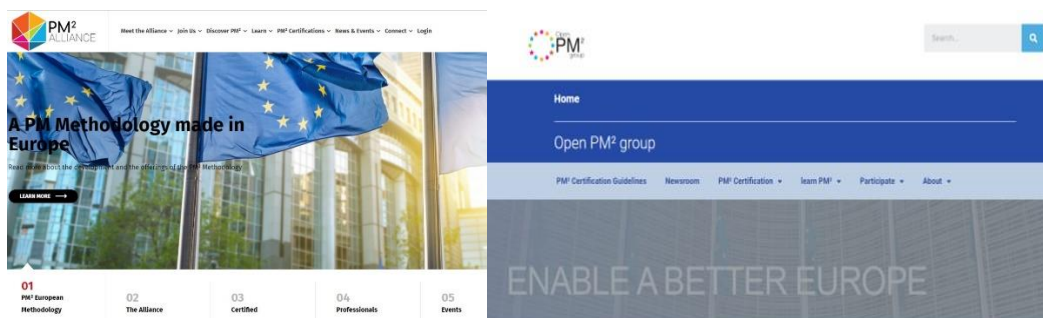


Figure 2: Website of the two PM<sup>2</sup> certifying institutions (at date)

Regarding the added value of specific training accreditations in PM<sup>2</sup> or the availability of a professional certification in PM<sup>2</sup>, it should be noted that these have appeared as positively evaluable items in some calls for tender from the European Commission, albeit in an isolated and limited way.

## 4 GUIDES AND ARTEFACTS

In relation to the map of artefacts of the PM<sup>2</sup> framework, the need to have the artefacts corresponding to Agile management, programme management and portfolio management was stressed, as to date only the guides are available.

It should be remembered that the methodology was born with an clear practical spirit and the availability of a single guide does not make it any easier for project managers to use it on a daily basis. In this regard, CoEPM<sup>2</sup> is currently working on a new web portal which will include some of this information.



Figure 3: Current versions<sup>1</sup> of the Agile Guidelines, Programmes and Portfolio of the PM<sup>2</sup> Framework

## 5 REAL CASES – EXPERIENCES

One of the fundamental aspects analysed was the existence of experiences in the application of the PM<sup>2</sup> methodology, both by private entities and public administrations:

- In relation to the private sector<sup>2</sup>, it is understood that such application entails an investment to generate know-how for the company, so it is difficult to access to successful cases on this matter.
- In the case of Public Administrations, some activity has been detected in relation to the training of groups in the PM<sup>2</sup> methodology, although organisational transformations that integrate the PM<sup>2</sup> framework have not yet been consolidated<sup>3</sup>. However, actions

<sup>1</sup> All guides are available from the Publications Office of the European Union. The website with the search tool is: <https://op.europa.eu/en/home>

<sup>2</sup> One of the most remarkable experiences is the implementation of PM<sup>2</sup> in the Belgian railway facilities. "Rolling out PM<sup>2</sup> at Belgian Rail, The business case, the challenges, the roadmap" which was presented at the PM<sup>2</sup> Alliance conference in 2020 by Niels de Weyer, Head of Operations (YPTO).

<sup>3</sup> This is not the case for various bodies and institutions of the European Commission, such as the European Environment Agency, the EC Publications Service and the European Central Bank, among others.

are being carried out by this working group with the aim of giving visibility to those administrations that are making use of the PM<sup>2</sup> methodology.

## 6 DIGITALISATION

This practical application may be hindered by the lack of digitisation of the methodology and its components. The availability of a set of artefacts or templates in an editable format is not sufficient for the daily management of projects and programmes. It would be necessary to implement and develop a well-structured software application with an architecture fully aligned with the methodology, integrating additional project management tools that are really fundamental in practical project management (Kanban; Dashboards; Communication; Alert System; etc.).

There are a multitude of project management software applications on the market and it has been detected that most of the developers have very weak knowledge of the PM<sup>2</sup> methodology and of the opportunity that the development of a tool that would help its practical application could represent. Any action that increases the visibility and knowledge of the methodology by all the stakeholders would improve its position, as well as helping it to reach a higher degree of maturity, which is necessary for its use to become more widespread with greater guarantees of success.

The PM<sup>2</sup> methodology and its framework cannot be aside from the European Commission's approach to the digitisation strategy<sup>4</sup> for the coming years, which is based on the following concepts:

1. Moving from IT to digital transformation.
2. Growing from digital skills to digital culture, and
3. Moving from being a service provider to digitalisation and developing digital policies and transformation actions.

The same Communication to the Commission also states literally that:

*“A strong digital culture, supported by strong digital leadership, will integrate data-driven insights into decision-making, drive customer focus and innovation, and foster collaboration across the organisation”.*

Project management is based on data management and decision making that is oriented towards customer satisfaction and requires the collaborative work of the entire organisation.

Therefore, the digitisation of PM<sup>2</sup> and its framework is not an option but an indisputable necessity to align the European Commission's own project management approach with its own digitisation strategy and policies.

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<sup>4</sup> Communication to the Commission. European Commission digital strategy Next generation digital Commission. Brussels, 30.6.2022 C (2022) 4388 final.

## 7 REVISION, UPDATES AND CONTINUOUS IMPROVEMENT

In relation to the process of updating and continuous improvement of the PM<sup>2</sup> framework it is important to remember that the current version of the methodology (3.01) is about to be five years old (it was edited in 2018).

As can be seen from the revision recommendations of the International Standards Association (ISO) for the systematic reviews, its revision would be entirely timely (see table 1).

Table 1: Timing of Systematic Reviews (ISO, 2019)

Deliverable	Max. elapsed time before Systematic Review	Max. number of times deliverable may be confirmed	Max. life
International Standard	5 years	Not limited	Not limited
Technical Specification	3 years	Once recommended	6 years recommended
Publicly Available Specification	3 years	Once	6 years
Technical Report	Not specified	Not specified	Not limited

It could include the correction of errors, inconsistencies and certain biases that detract from the universality of its application (such as the multiple references to the European Commission in the guide and the artefacts).

This revision process can be carried out following procedures like the ones carried out by international institutions of recognized prestige, such as the International Organization for Standardization - ISO<sup>5</sup>. It should undoubtedly be led by CoEPM<sup>2</sup> with the collaboration of third parties and experts.

The participation of the experts would enrich the process, as we are talking about stakeholders in the PM<sup>2</sup> user community who have been directly involved in the practical use of the methodology in other contexts and other types of projects other than those of the European Commission itself and in the field of information technologies.

<sup>5</sup> ISO (2019) Guidance on systematic review process in ISO. Switzerland: International Organization for Standardization

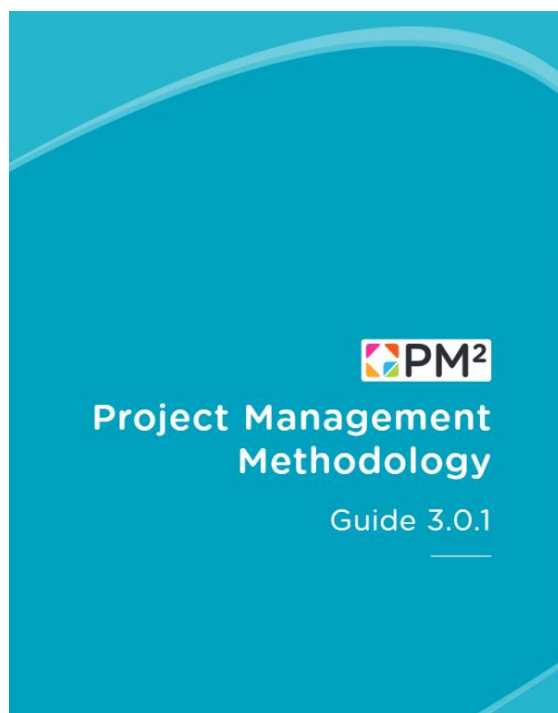


Figura 1: Versión actual de la Guía PM<sup>2</sup>

However, it is understood that users are still in the process of internalising the framework and that, therefore, a substantial revision of the guide, which could lead to a version 4.0, would not be appropriate, so it would be advisable for CoEPM<sup>2</sup> to activate a systematic process for a new version 3.1 that includes the aspects mentioned above.

## 8 ACKNOWLEDGES

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