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Progressing a Discipline and Profession of Projects

Lynn Crawford[1]

Abstract

This essay reflects on Peter Morris's concerns about the the way that project management has been articulated through the advocacy of those institutions and associations that were formed to recognise project management as a distinct area of activity. The essay considers how project management has wrestled with the challenge of being recoginised as both a discipline and a profession and how there has been both progress and concern at how our understanding and practice of project management has evolved. The essay concludes with a recognition that the developments in both the understanding of the discipline of project management and the profession of project management have been in directions that Peter Morris was recommending for many years but, as he also made clear, we cannot rest on our laurels as there is still more to be done.

Keywords:

Projects, Management, Profession, Discipline, Standards

[1] School of Project Management and John Grill Institute for Project Leadership
Faculty of Engineering, The University of Sydney
Email: lynn.crawford@sydney.edu.au

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INTRODUCTION

The definition and development of a "management of projects" discipline and profession is a pervasive theme in the work of Peter Morris to which he has contributed significantly both as an advocate and critic. Although acknowledging the role of a distinct body of knowledge in professional formation and actively contributing to the early development of the APM's Body of Knowledge, he was at the same time an articulate critic of the scope, form and feasibility of defining standards and bodies of knowledge that could delineate without disabling a management of projects profession. In 2016, reflecting on his Festschrift, Peter Morris concluded that there had been progress but that there was more work to do and "more to come!!" (Morris, 2016, p. 370). Concerns he raised at that time were a lack of agreement on the content of a distinctive body of knowledge and the adequacy of the name for a discipline that was still "not taken seriously by mainstream academia" (p.369). He remained concerned with continuing perceptions of execution and delivery focus and was a strong advocate for extending the discipline and profession to engage with a new genre of projects that would address planetary and societal changes (Morris, 2022). In this paper I will argue that recent professional developments respond to Peter Morris' critiques of bodies of knowledge and that his concerns for the present, and aspirations for the future, can potentially be addressed by recognising the differences between a discipline and a profession and broadening the scope for engagement by focusing, as Peter Morris suggested (Morris, 2013b), on the project as unit of analysis, rather than it's management.

The terms discipline and profession are, in practice, often used interchangeably. Some clarification and distinction between the two is a useful starting point for further discussion. They are not the same. A discipline, according to dictionary definitions[2], is a branch or area of knowledge or study, typically pursued and advanced in academic institutions. A profession is concerned with the practitioners that use the discipline's knowledge base (Grossman & Hooton, 1993) and are expected to demonstrate mastery of the distinctive body of knowledge. A discipline can exist independent of any profession, but a profession without a healthy discipline, as Morris has pointed out, is a "profession with a hole in its head" (Morris, 2014, p. 149).

THE DEVELOPMENT OF PROJECT MANAGEMENT

Some of Morris' concerns about the development of project management as a discipline and a profession can be traced back to its origins in communities of practitioners with shared interest in project planning and the challenges of working in matrix organisations (Morris, 2013a, p. 52). These were the shared interests that drove the formation of the first associations that began to promote a profession of project management. In pursuit of professionalism, these practitioners began

[2] https://www.merriam-webster.com/dictionary/discipline; https://languages.oup.com/google-dictionary-en/

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to develop practice-based 'bodies of knowledge' that could be used to delineate a project management profession and guide development of certification programmes (Morris, 2013a, p. 53). With the intent of carving out territory for a 'new' profession of project managers, the initial 'bodies of knowledge' aimed for parsimony in identifying the knowledge and practices that they considered "unique to the project management field" and "applicable to most projects most of the time" (PMI, 2008, p. 13).

The practitioners involved in early development of the distinctive 'bodies of knowledge' and associated certification programmes were primarily based in engineering, construction, defense and aerospace industries with a perspective of contracting or managing contractors. It was therefore hardly surprising that they focused on execution and delivery, although this became one of Morris' abiding concerns (Morris, 2013b, 2016, 2022). The Project Management Institute (PMI) produced an Ethics, Standards, and Accreditation (ESA) Report in 1983 (PMI, 1983) as a precursor to their first Project Management Body of Knowledge (PMI, 1987), which aimed to identify knowledge "unique to project management" (Morris, 2013, p. 52). Indicative of the execution focus, the primary components of this first PMBOK® were scope, cost, time, quality, human resources, communications, contract/procurement and risk management. It was not until the 1996 edition of the PMBOK® (PMI, 1996), issued as a 'guide', that integration was added as a knowledge area. The first APM Body of Knowledge was published in 1991, and its development was led by Peter Morris. From his research, Morris had identified that the main drivers of project performance and success were not the execution focussed "work breakdown structures or critical path" (Boyce, 2010, p. 55) and the other topics covered in PMI's PMBOK®. From the data, he had found that more important keys to success were how projects "were set up, their interaction with stakeholders, the relationship with sponsors' strategy, choice of technology, commercial strategy, selection of people, behaviours, leadership and so on" (Boyce, 2010, p. 55).

The professional associations were effective in marketing this new profession, its distinctive body of knowledge and associated certification programmes for project managers and, as the rate of change accelerated, projects were increasingly used across all industry sectors to achieve results. Project management practice spread beyond it's origins and was widely adopted in quite different contexts such as information systems and technology, policy development and business transformation. Tensions began to develop between project management guides and standards that promulgated a unique body of knowledge broadly applicable to all projects, and the different contexts and practitioners to which they were now being applied.

As Morris points out (2013a), the knowledge required for effective management of projects is not "unique to the project management field" (PMI, 2008, p. 13). Much of what is required is drawn from other disciplines, and even the knowledge and practices identified as distinctive to project management, such as "cost, risk, procurement, quality, human resources and communications" (Morris, 2013a, p. 55) are applicable as much to

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ongoing operations as to projects. The management of projects is essentially interdisciplinary (Morris, 2013a, p. 247).

The Project Management Institute's PMBOK®Guide drew the majority of Morris' critique and that of others (Bresnen, 2016; Hodgson & Cicmil, 2007; Morris, Crawford, et al., 2006). The APM Body of Knowledge, to which Morris contributed significantly and which had a much broader scope, did not escape criticism (Morris, Jamieson, et al., 2006). Japan's P2M (Crawford, 2009; PMAJ, 2017) was praised for its breadth of coverage and emphasis on innovation, development and improvement (Morris, 2013a, p. 61). The APM's Body of Knowledge, arguably as a result of Morris' influence, took what he described as a management of projects approach that extended beyond execution to include 'the front end' and consideration of the organisational environment of projects. It was the PMBOK®Guide, with its normative approach, execution focus, and easily remembered structure of knowledge areas which, widely promoted by the Project Management Institute and it's zealous and growing membership[3] and baseline certification holders[4], became the most widely known representation of project management as a field of practice. It was the PMI's Body of Knowledge (BOK) that Morris saw as dominating and limiting the growth and development of a project based discipline and profession.

The following discussion will trace recent developments in practice and in the PMBOK®Guide that can be seen as addressing some of Morris' concerns.

AN EVOLVING DISCIPLINE AND PROFESSION

By the mid 2000s the PMI's PMBOK®Guide had effectively become the reification of project management. It directly influenced understanding of what constituted project management, and it's supporters, including practitioners and those with vested interests such as trainers, the Project Management Institute and its many volunteers, were highly resistant to change. Bresnen (2016) provides an excellent discussion of the institutional logics that inhibit change to BOKs. In 2006, writing about research to update the APM Body of Knowledge, Morris et al. (2006) described the reluctance of APM to change the structure of the 5th Edition because "it is the structure that people see first and that organises much of the institutional work which flows off a body of knowledge" (Morris, Jamieson, et al., 2006, p. 472) such as certification and training. There are significant vested interests in BOK structures, both commercial and intellectual. According to Morris et al. (2006), although research was commissioned and conducted as a basis for the 5th Edition of the APM Body of Knowledge, this research was largely sidelined in favour of preserving the structure of previous editions, and the 5th edition as published in early 2006 was largely developed by groups of practitioners with varying degrees of reference to the research-based draft. When

[3] 93k members in 2002, 253k in 2007 and over 600k in 2022 according to annual reports - https://www.pmi.org/about/annual-reports

[4] Over 600k certification holders in 2014 and 1.2m in 2017 - https://www.pmi.org/about/annual-reports

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Morris subsequently referred to project management as a practice based profession with a hole in its head he was referring to its practice based origins and "absence of academic enquiry at the level of the discipline as a whole" (Morris, 2014, p. 149).

Although "project management BOKs are primarily developed around the needs of certification" (Morris, Jamieson, et al., 2006, p. 472), BOKs were also promoted as the basis for legitimising a profession of project management, or, as Morris would have preferred, the management of projects. The promotion of these BOKs was so successful that they became a victim of their own success. The dominance of PMI's PMBOK®Guide structured the perception of an execution and delivery focused profession disconnected from organisational strategy and decision making. The promotion of certification and a push to increase organisational project management capability through certification of project managers and the development of project management processes, procedures, governance and reporting led to perceptions of excessive bureaucracy and management overhead. The processes promoted in the BOKs may well have been minimal for very large and high risk engineering and construction projects, but they were a sledgehammer to crack a nut in smaller, less capital intensive endeavours. They were proving too inflexible for ICT and business change projects being undertaken in highly uncertain environments with fast developing technology.

The professional associations were faced with a dilemma that Morris had repeatedly foreshadowed. They were caught between a desire for continuity to support existing members, collateral, certifications and training programs, whilst at the same time needing to recognise change to maintain relevance. This dilemma is well theorised by Bresnen (2016), who talks about the tensions and contradictions of competing institutional forces in support of continuity or change when faced by factors "such as widely recognised inefficiencies and lack of adaptability of structural forms, the over-elaboration of structures / processes and tendencies towards stultifying conformity" (p. 334).

The publication of the Agile Manifesto in 2001, marked the development of a new set of institutional logics, a new set of practices, assumptions, values, and beliefs, well supported by a growing number of software project managers (Morris, 2013a) that began to compete with the traditional approaches embodied in the project management BOKs, certification and training programmes. This new movement offered flexibility, and perceptions of reduced bureaucracy and overhead. As the new century progressed, the Agile movement gained momentum, spawning agile based methodologies (Alqudah & Razali, 2016), tools and techniques and a plethora of certifications from various accrediting bodies including Scaled Agile, Scrum Alliance, International Consortium for Agile (ICAgile) and the Agile Business Consortium. These certifications were not just for project managers, but for all team members, significantly extending the potential certification market.

Faced with institutional pressures and a commercial opportunity to expand their market, the Project Management Institute embraced the agile movement by offering

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Agile Certification and bundling the sixth edition of the PMBOK®Guide (PMI, 2017) with an Agile Practice Guide developed in collaboration with the Agile Alliance. In this edition of their BOK, they also made reference to the need for tailoring, acknowledging that not every "process, tool, technique, input, or output identified in the PMBOK®Guide is required on every project" (PMI, 2017, p. 28). However, the basic structure of five project management process groups and ten knowledge areas of previous editions was retained. The institutional forces and vested interests that resisted change were satisfied by retention of the existing structure, but the changes occurring in practice and the market place were being acknowledged.

On numerous occasions Morris expressed concerns that the "structure of the PMBOK®Guide, its certification programs and its philosophy of project management are so fixed, and are so widely disseminated that they dominate the general perception of the discipline", limiting its scope, focusing on execution, missing "many of the things that are important to the successful management of projects" (Morris, 2013b, p. 8) and diminishing "the role of judgement that managers need in applying knowledge in different contexts" (Morris, Crawford, et al., 2006, p. 719). The seventh edition of the PMBOK®Guide can be seen as an acknowledgement of and response to many of Morris' criticisms. It courageously presents a significant change to structure and content, responding to those who might resist such significant change by stating that nothing in the seventh edition negates or contradicts the "process-based approach of previous editions" (PMI, 2021, p. xi). In effect, the seventh edition does not replace but complements previous editions.

ITERATIVE IMPROVEMENT

In many ways, the seventh edition of PMI's BOK, appears to respond to Morris' call for "...a broader, more interpretivist view of the discipline across the whole 'management of projects' job family, rather than one which is predominantly prescriptive" (Morris, Crawford, et al., 2006, p. 719). In this edition, process-based standards, which are acknowledged as being inherently prescriptive, are replaced by principles for value delivery. The dominant structure around knowledge areas is replaced by performance domains defined as groups of "related activities that are critical for the effective delivery of project outcomes" (PMI, 2021, p. xii). The focus shifts from the project manager to the project team. It claims to adopt a systems view and the principles-based focus is intended to provide flexibility for application in a broad range of contexts.

However, as Morris would say, there is still more work to do in order to address his vision. This includes providing a sound research based foundation for the distinctive body of knowledge, extension beyond an execution focus, and recognition of the importance of the 'front-end' and the role of the sponsor. Although PMI has been sponsoring academic research projects since the early 2000's with a stated expectation that research findings will have direct application to some aspect of the project management body of knowledge or its practice, the seventh edition is not research based. The Preface to the seventh edition of the PMBOK®Guide makes no reference to their own funded research or any other research as a basis for its development, referring only to involvement of a global community of practitioners.

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One of the eight performance domains in the PMBOK®Guide 7th Edition, is devoted to the development approach and project life cycle. Morris claimed that it is the development life cycle that "distinguishes projects from non-projects" (Morris, 2013b, p. 7) and argued for a management of projects approach whereby the development life cycle begins with a project definition phase, often referred to as the 'front end', identified in research (Miller & Lessard, 2001 and others) as critical to project success (Morris, 2013b). In the PMBOK®Guide 7th edition, much attention is given to different delivery approaches such as predictive, iterative, adaptive or hybrid, but the life cycle remains essentially delivery or execution focused, beginning with feasibility and ending with closure. The 'front end', where the initial concept is defined, and the role of the owner or sponsor are pivotal, still remains outside the scope of PMI's BOK, as illustrated by Morris in 2013 (Morris, 2013a, p. 62, 2013b, p. 9).

The primary audience for the seventh edition of PMI's PMBOK®Guide extends beyond the role of the project manager to encompass the project team, defined as "the people who are responsible for producing project deliverables that realise business outcomes" (PMI, 2021, p. 16)' While recognising that responsibility and contribution are not limited to the project manager, and acknowledging the need for alignment with the business, this perpetuates the execution focus. Despite research repeatedly referred to by Morris (2022) that consistently indicates the sponsor role as the major factor contributing to the success or failure of projects, the sponsor is effectively a bystander in this document. There is an Appendix that "describes the actions and impacts of sponsors and how these factors contribute to the overall success of the project" (PMI, 2021, p. 207) and the sponsor is referred to in various places throughout the document, but primarily in a list of roles to whom the project manager and team may report.

This discussion, like Morris' critique, has focussed on PMI's BOK. He was particularly concerned that it dominated and limited the discipline and profession, with it's execution focus, prescriptive process based approach, structure and wide dissemination. Although the seventh edition of the PMBOK® Guide may not have addressed all of these concerns, it has arguably, largely as a result of market forces, adopted a broader, more inclusive, flexible and systemic view that signals an opportunity to capitalise on other developments to advance a new conceptualisation of a project based discipline and practice.

A major advancement in recognition of and as a profession was the achievement of Chartered Status by the UK Association for Project Management in 2017. The APM Body of Knowledge or APMBoK remained important, but more as a resource and statement of core beliefs or ethos than as a basis for delineation of a discipline and associated profession. Morris' aspirations for a higher level of contribution to society are reflected in the Foreword to the 7th Edition of the APMBoK which states that "projects can not only be delivered successfully, but also to the benefit of society, the economy and the environment" (APM, 2019, p. xii). A significant amount of the content is devoted to the front-end, to shaping the project and its context (Morris,

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2013b) and to the people who engage in project-based working and the management of projects including programmes and portfolios. Further, the major contributors to the 7th edition of the APMBoK were academics and researchers.

As stated earlier in this essay, professions are concerned with the practitioners that use the discipline's knowledge base. A discipline can exist independent of a profession, but can – and indeed should a profession exist independent of a discipline? Project management began as a field of practice with aspirations to becoming a profession. In the absence of a distinct project-based academic discipline, aspiring project professionals sought to provide a knowledge base by focusing on knowledge that underpinned the practices they considered distinctive to the management of projects. As time has passed, more academics and researchers have become interested in and contributed to the study of projects, their management and leadership. There are now a good and growing number of well regarded academic journals, entire specialist project research conferences and project studies streams at major conferences. There are many postgraduate, and a growing number of undergraduate programs devoted to project studies. Acknowledgement that there is now a projects discipline is signified by the launch in 2022, at a leading university, The University of Sydney, of a School of Project Management.

Morris said "I believe that there does need to be, and that there is, a discipline for managing projects; and further that this discipline needs to be enlarged from how many perceive it today" (Morris, 2013b, p. 6). The direction for this enlargement of a discipline that clearly does now exist, is potentially provided by Morris' claim, as far back as the early 1990s (Morris & Hough, 1993) that it is the project that should be the unit of analysis, "not management processes and practices" (Morris, 2013b, p. 7) and that it is the development life cycle that "distinguishes projects from non-projects" (Morris, 2013b, p. 7). If we take the project as the unit of analysis for the discipline, the scope of relevant research and scholarship can then be extended to include the nature of the project, it's impact, the value it delivers, what it produces, as well as all aspects of project based work, governance, organisation, management and leadership. This perspective encompasses programmes, portfolios and any other project related forms that may evolve. The focus of the discipline becomes the project, enabling integrative and interdisciplinary investigation of an evolving phenomenon and recognition of the pluralistic nature of project related knowledge (Pinto & Winch, 2016; Söderlund et al., 2004).

CONCLUSION

In 2016, responding to his Festschrift, Morris said that much had been achieved in development of a project based discipline and profession, but that there was more work to do (Morris, 2016). Since then, further progress has been made. The seventh edition of the PMBOK®Guide has moved away from a prescriptive, process based structure and embraced a broader, more flexible and systemic approach. The discipline is acknowledged in academia, and the profession now extends beyond the project manager to the project team and project professionals and is recognised by achievement of Chartered status in the UK.

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This is no longer a "profession with a hole in its head" (Morris, 2014, p. 149). There is now a lively and growing body of research and scholarship enriching a pluralistic knowledge base for the profession and its practitioners to draw upon. Increasing projectification of work (Schoper et al., 2018) presents both opportunity and challenge for the development of the discipline and the profession as it expands the potential scope but may undermine identity and promote territorial competition. Societal challenges highlight the importance of a discipline and profession that bring an integrative and interdisciplinary approach to effective action.

For those of us who have shared Peter Morris' aspirations for a thriving project based discipline and profession there is still much work to do to build on his significant and influential legacy. As the academic discipline becomes stronger, we must continually ensure that we maintain strong relationships between theory and practice and make sure that we don't "drift off into discussing theories that don't seem very connected with its practice!" (Morris, 2016, p. 369). Project management began as a field of practice. Over time, due to the efforts of Morris and others, it has developed into a discipline, recognised and advanced in academic institutions. The profession no longer has "a hole in it's head" (Morris, 2014, p. 149) but we must now ensure that the academic discipline does not become disconnected from practice and the professional associations. To continue to build a healthy and relevant profession and discipline the two must remain connected. One way in which professions such as engineering and medicine maintain close relationships with their disciplinary base in academic institutions is by accrediting academic programmes, and the Project Management Institute has led the way by establishing a highly credible academic accreditation process. Academics should actively collaborate with practitioners and with the professional associations both to improve practice through dissemination of research findings and to understand the emerging needs of practice to drive future research. Academics and practitioners, the discipline and profession of projects, need to work together in an integrated and systematic way to meet the "range and scale of challenge that we and our planet are under" (Morris, 2022, p. 93).

We also need to find "an adequate name for the discipline" (Morris, 2016, p. 369). Morris was clearly in favour of 'management of projects', but his advocacy has not shifted the prominence of 'project management' which has become institutionally entrenched as the most widely used name for the profession. There may be more potential for change in the name of the discipline. A number of academics have started to use the term 'project studies', and 'project organising' is often used for project related streams in more broadly based conferences. However, in establishing a School in the Faculty of Engineering at The University of Sydney, we proposed that it be called the School of Projects, but this was rejected by Faculty leadership who could relate more readily to the widely used 'project management' even though the discipline's academics claimed that this term no longer adequately described their remit. This was an example of the pervasiveness of institutional logics that Morris found challenging when trying to achieve change. It demonstrates the

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challenges we face as we follow in his footsteps and continue to fight for relevance in an evolving discipline and profession of projects. As Morris would say: "Let's keep working at it! There's more to come!!" (Morris, 2016, p. 370).

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