

Guest Editorial

Coming to Terms with Project Success: Current Perspectives and Future Challenges

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1. Introduction

The need to periodically reassess the nature of project success is itself a recognition that projects and the project society (Lundin et al., 2015) are in a constant state of evolution and reconfiguration. As our call for papers for this special collection suggests, over the decades, the conceptualization and assessment of project success has evolved from a rather unidimensional, simplistic, and reductionist account to more multidimensional, holistic, and dynamic models (Pinto et al., 2021). Indeed, our understanding of project success has been best understood through a lens of recurrent dynamism; that is, following our earliest formulations, for a number of years, there was a tendency to embed these criteria in amber and maintain the façade that projects, increasingly complex though they were becoming, could still be evaluated against such an antiquated standard. However, as our understanding of projects and the key levers that can affect their success (factors) has expanded and become

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more sophisticated, this knowledge has signalled a concomitant need to regularly reappraise how projects are deemed successful (criteria and dimensions).

Success, then, captures a variety of perspectives and contingency variables, including *who* is making the assessment, *when* they are making the assessment, on *what* criteria they are basing their appraisal, and *what* type of project is being evaluated, not to mention *where* or in *which* context the project is being delivered. Project outcomes themselves can be judged in terms of resulting benefits, commercial success, stakeholder satisfaction, sustainability, efficient use of resources, and so forth. Indeed, one of the critical features of project success, when viewed from a historical perspective, is how our discipline's original, simplistic model of measuring project success according to time, cost, and scope/quality has been steadily broadened and "complexified," (Tsoukas, 2017) as we come to deepen our understanding of project-based work and the goals toward which organizations strive. In short, our evolving knowledge of project success reflects our enhanced understanding of project management theory and practice in the modern age. This special collection on project success has sought to capture the evolving nature of project success conceptualization and assessment.

2. Major Emergent Themes

We were pleased that the original call for papers resulted in the submission of dozens of manuscripts, covering a wide range of perspectives, classes of project, and underlying challenges. For example, several papers focused on the public sector and stressed the importance of the front-end engineering and design stage. Public sector projects are unique because taxpayers fund them, and their accrued benefits may involve longer life spans. Likewise, some of the projects studied and theories developed assumed a traditional,

waterfall development process, while others examined project success and benefits realization within an agile methodology. Following a thorough review process, the original set of papers was whittled to a final set of eight. While we had proposed a number of avenues for research on this topic in our original call for papers (see Pinto et al., 2021), the final set of manuscripts tended to cluster around three key themes: the measurement of project success — a project's life extension, the measurement of project success — a stakeholders/benefits extension and expanding the definition of project success.

- **The measurement of project success – a project's life extension**

Research on project success has focused on the measurement of project success following its completion, coining terms such as “project management success”, “project investment success”, and “impact on society” to name a few (Shenhar and Dvir, 2007; Zwikael and Meredith, 2021). The papers in the special collection extend this measurement from a final evaluation to interim assessment during other project's life stages. These papers advance our knowledge by measuring empirically the progress of the project and its trajectory towards success (*likely* success), rather than waiting until the end of the project to determine the success level (*final* success), when it is too late to make any changes, thus effectively showing that project success and project performance are different but cognate concepts. In particular, the special collection extends the measurement of success to the following four project stages:

(1) The project front-end. During this stage, we evaluate the success of the business case development and the quality of the decision to fund the project;

- (2) Project planning. During this stage, we evaluate the quality of the project plan and its potential to deliver the project's objectives set in the business case;
- (3) Project execution. During this stage, we evaluate the process of project management and the trajectory of the project to achieve success; and
- (4) Project closure and benefits realization. During this stage, we evaluate the flows of economic and social value that emerge over time from the project and their contributions, or not, to the ultimate success of the project.

All four stages contribute significantly to the ultimate success of a project, e.g., an inadequate front-end process that does not set effective project goals would hinder the chance of achieving these poorly defined goals successfully and delivering the expected benefits set in the business case. While success frameworks agree that benefits realization is a key measure of success (e.g., Zwikael et al., 2018), paradoxically, research highlights the problem that benefits are often not realized, resulting in low project success rates.

Marnewick and Marnewick (2022) discuss in this special collection the continuing assessment of project success in agile projects at various phases: (1) Before the project, e.g., the quality of benefit setting, (2) During the project, e.g., the quality of the technical and managerial processes required during a project's life, and (3) After the project, e.g., how projects are used to realize benefits in relation to organizational objectives, the validation of the business case and the realization of benefits. Benefits realization intrinsically forms part of agile methodology as interim benefits are regularly delivered to customers during project execution, often resulting in higher success rates. Twelve principles were identified in their interview-based research to facilitate an effective agile project benefits management process that would ultimately improve project success.

Similarly, Varajão et al. (2022) propose, in their paper, a novel approach to better understanding success drivers for the project under the name of "success management,"

which focuses on defining, leveraging, and securing project success by gaining a comprehensive awareness of what is valued by stakeholders and managing accordingly to that understanding. Their paper offers a theoretical basis and case study in developing a success management process carried out through action research in the context of an IT/IS project by a large multinational company delivered in collaboration with a university in Portugal. The results show that success management can both raise a holistic awareness of success contributors while promoting success-focused planning and action. Importantly, their paper also discusses what success should look like at various stages of a project. This includes: (1) project proposal success, (2) project management success, and (3) project benefits success.

Finally, Abdallah et al. (2022) examine the front-end or development stage in three Québécois transportation infrastructure projects (i.e., a bridge-tunnel refurbishment, streetcar network, and metropolitan light train). As part of their “process-as-evolution” research, they develop a trajectory in the volition-representation space based on stakeholders’ perceptions to measure development success using two dimensions throughout a project’s life: (1) Volition, which measures the extent to which the project becomes an attractor for stakeholders’ interests and engagement, and emerges as an ‘obligatory point of passage’ for achieving their goals; and (2) Representation, which captures the extent to which representations of various aspects and activity strands are integrated into a coherent interpretation of who does what and when. Their novel approach to the nature of start-to-finish trajectories or paths that unfold in the development stage involves both defining and measuring project development performance and success.

- **The measurement of project success – a stakeholders/benefits extension**

The action research study by Scheepers et al. (2022) focuses on business unit managers as stakeholders in a global information technology service management project. The authors discuss the interactions between project success, project benefits, and project stakeholders. Little work to date has addressed the importance of line managers or business unit perceptions of project value and their impact on project success in terms of how the process of benefits realization management helps align these perceptions. The authors find that project benefits and the conceptualization of project success were dynamically co-constructed with stakeholders over the project's life. This is in keeping with the social approach whereby perceptions are situational and co-created. A unique contribution of this paper is that benefits realization management matters for the successful delivery of the project and thus should be a major part of the project management process.

Similarly, an intriguing paper by Stephan-Korus and Bubenzer (2022) used a qualitative research design within a multi-national, technology-driven organization to investigate the actions of a particular group of project stakeholders, employees who opt to pursue their radical innovation projects covertly; that is, members of a firm, committed to their project, may find it in danger of cancellation for a number of reasons, or it may never have been formally approved as part of the firm's portfolio. These stakeholders choose to pursue and manage their projects in a *“different, secret setting with the ultimate goal to reintegrate them successfully in the formal organization.”* Identifying 15 case examples, they examine this phenomenon, referred to as “bootlegging,” in detail, along with its antecedents, and an understanding of the project management strategies that will allow for the reintegration of bootlegging projects into the formal organization. Their paper identifies three critical strategies for internal project success including: (1) relational networking, (2) targeted embedding, and (3) actionable selling that is associated with successful reintegration back

into the formal context. Importantly, their study demonstrates how project success extends beyond the characteristics of the project (or solution) and includes its successful adoption within and by the organization.

- **Expanding the definition of project success for various “contexts”**

Literature on project success is too narrow at times in defining success and apprehending its construct dimensions. For example, some key success models include dimensions such as “business success”, “developing a new technology”, and “creating a new market” whereas many projects do not have such considerations. The recent interest in benefits realization as a determinant of project success, leaves it open to various sectors, organizations and projects to set their own relevant target benefits to be realized from a project, as a success measure that is relevant for their particular *context* (Pinto et al., 2021).

In their paper, Volden and Welde (2022) focus on a multiple case study and a meta-evaluation of projects in the Norwegian public sector to demonstrate a relevant set of project benefits for this sector. The authors categorize public projects as ones completed for security and other essential, social needs or investments to facilitate economic development, national pride and prestige. A novel aspect of this paper is that they address ex-post evaluation of public investment projects, an uncommon but important approach because it addresses actual, positive and negative net impacts. Based on the findings of their longitudinal study, these authors propose a generic goal-oriented evaluation model to measure public project success at the operational, tactical, and strategic levels. In doing so, the authors address project success with an emphasis on *context* and build upon the recognition that project success is a multi-dimensional construct, expanding its focus to include various success dimensions that may be

relevant for public projects over time: (1) efficiency, (2) effectiveness, (3) other impacts, (4) relevance, (5) sustainability, and (6) benefit-cost efficiency.

A second paper that critically examines the current conceptualizations of project success (Ika and Pinto, 2022) updates, recalibrates, and further “complexifies” project success based on four multidimensionality sources: benefits realization, stakeholder perceptions, issues of timing, and sustainability. Responding to the challenge of devising a parsimonious success model that key stakeholders can minimally agree upon, the conceptual paper proposes a four-dimensional, “tesseract” model of success to assess project plan success, business case success, and green efficacy, along with the shared feeling of these key stakeholders. The paper discusses the boundary conditions for a proper use of the success model and concludes with an agenda highlighting future research to further our understanding of the project success phenomenon.

The final paper (Denicol and Davies, 2022), addresses the context of megaprojects, with an eye toward better understanding the drivers of their success, including organizational design decisions made at the outset of these large-scale projects. Their study analyzes the cases of six of the largest European megaprojects in London – one of the world’s largest megaproject clusters – to explore the challenges of inter-organizational design. The organizational dynamics from the six cases reveal the need for a more systemic analysis to achieve successful outcomes, while exploring integration models across multiple organizations, and developing a more comprehensive model of megaproject success.

3. The special collection and future steps

We are pleased to present the set of papers for the special collection on project success and equally gratified that the topic that is so often under-appreciated (even though it

represents the principle dependent variable in much project management research!) has garnered a collection of thought-provoking and diverse perspectives from our authors. The very diversity of these viewpoints, we believe, is itself evidence of the criticality of project success as a theoretical construct, one that retains a central place in the study of project-based work and the organizations within which it occurs.

To cite just one example, the papers in the special collection showcase how different theories may shed different yet complementary lights on project success definition and assessment. These theories include, but are not limited to, strategy theory, contingency theory, complexity theory, agency theory, stakeholder theory, evaluation theory, organizational design theory, theory for design and action, and theory for will and representation, etc. Likewise, from a methodological standpoint, we observe a wide range of mostly qualitative research methods that have been used throughout the empirical papers: multiple case study, longitudinal analysis, action research, and of course semi-structured interviews. We note that only one paper uses a quantitative approach focused on meta-evaluation of dozens of projects in addition to multiple case study, thus showing the importance of mixed methods in project success research. We argue that the use of a longitudinal or “process-as-evolution” approach in some of the papers is commendable to capture the impact of time on project success measurement.

The diversity is not only present in the theories and methods but as well in the themes that were discussed. We summarize the three main themes that emerged from the special collection’s papers in Table 1, where we demonstrate how the concept of project success has developed to various project stages, stakeholders and evaluation contexts.

Project stage: When is the evaluation made?	What is being evaluated?	Who is being evaluated?	Who is evaluating?
Initiation (front-end)	The quality of the business case	The project champion/owner	The project funder
Planning	The quality of the project plan	The project manager	The project owner
Execution	The process of project management	The project manager	The project owner
Closure and benefits realization	Project management success (the realization of the project plan)	The project manager	The project owner
	Project ownership success (the realization of the business case)	The project owner	The project funder
	Project investment success (the long-term success of the investment in the project)	The project funder	Key stakeholders

Table 1. Project success management process

Finally, as we end this special collection, we cannot resist the temptation to extrapolate the findings of this special collection and the many opportunities it holds to further our knowledge of this still elusive project success phenomenon. Indeed, as the collection of papers in the special collection has shown, we know a great deal about project success, its criteria and dimensions, and we are increasingly becoming aware of the complexity that surrounds its definition and measurement. We know far less, however, about the theorizing of project success in general, and how it lags behind the evolving theory of project-based work and project-based organizations in particular. In other words, we need to make our theories, inquiries, and models of project success match the complexity of the world of projects and the messiness of project management realities. This matching can help to satisfactorily meet the dual expectations of academic rigor and practitioner relevance for our research. To that end, researchers may want to investigate the following questions:

- 1) How do stakeholders forge consensus over project success at different stages of the project and what models of success can help in this age of sustainability? This query is crucial as projects are fraught with sociopolitical complexity, different stakeholders have different views and attributions of success at different moments in the project lifecycle, and thus project success remains an intersubjectively constructed phenomenon, especially at a time when sustainability looms large (e.g., Gil and Pinto, 2018; Ika and Pinto, 2022);
- 2) What role does the type of project and context of project delivery play in the definition and assessment of project success? Indeed, contingency theory teaches us that different projects call for different ways of conceptualizing and measuring project success including the recognition of the relative weighting of strategic considerations or complexity characteristics within the project in different settings (Shenhar and Dvir, 2007), not to mention different industrial, geographical, and cultural contexts;
- 3) When is a project successful and how does performance measurement help assess and achieve project success? This question has far-reaching implications from a theoretical and practical point of view, as there prevails an organizational need for interim project success evaluation to reward or sanction the productivity of project managers and their teams before completion; a project may be a success in the short-term and turn into a failure in the long-run and *vice versa*; and different stakeholders have different time horizons (e.g., Zwikaël & Meredith, 2021);
- 4) Who is in, who is out, who gets what (or does not), when, how, and why? As we learn from the most recent developments in stakeholder theory, this question deserves attention as stakeholders play a crucial role in the project as well as in its benefits and value creation, delivery, distribution, and capture (e.g., Ika and Pinto, 2022);

- 5) How does interorganizational design affect the delivery of project success and benefits realization? There is a need of more work on this research question (e.g., Denicol and Davies, 2022). Indeed, as the classic design maxim suggests, “structure follows strategy”, so organizational design helps set up projects for success. But, due to a slew of coordination and collaboration challenges, success and benefits realization are more complex to achieve in projects where multiple, independent organizations (e.g., a funding organization and multiple delivery organizations) with differing if not conflicting expectations (e.g., social value versus profits) are involved.

We hope that the special collection and the proposed research agenda induce a continually developing interest in the important theme of project success, as we discover that the more we are learning about managing projects, the more we are also understanding how success may be best understood. Many thanks to the authors for their musings of project success, the reviewers for their valuable help, and the Editor-in-chief for her solicitude!

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