



**UNIVERSITY *of*
WORCESTER**

**A NARRATIVE EXPLORATION OF
PROJECT GOVERNANCE IN AGILE
DIGITAL TRANSFORMATION PROJECTS
IN GERMANY**

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ABSTRACT

Organisations increasingly operate in complex and ambiguous environments, where competitive pressure, technological change and economic turbulence heighten the need for innovation (Eisenhardt et al., 2010). As a result, companies have begun implementing organisation-wide changes through digital transformation and have increasingly adopted Agile methods to manage projects characterised by high uncertainty and frequent scope changes (Chang & Chen, 2025; Fuchs & Hess, 2018). However, many organisations struggle to integrate Agile principles with existing governance structures designed for traditional, plan-driven environments (Lappi et al., 2018). This tension is particularly evident in Germany, where organisations often operate within formalised, hierarchical structures shaped by high uncertainty avoidance (Brodbeck & Frese, 2008; Hofstede, 2001).

In this context, project governance is recognised as a critical success factor that contributes to improved project outcomes (Nyandongo & Khanyile, 2019; Young, 2021). However, existing research remains largely grounded in traditional, plan-driven environments and offers limited empirical insight into how governance is applied in Agile projects (Luna & Marinho, 2023). Although conceptual frameworks have been proposed (Kujala et al., 2021; Lappi et al., 2018; Luna et al., 2014b), a substantial proportion of organisations report having no governance framework in place for Agile projects (Nyandongo & Khanyile, 2019). As a result, there remains limited understanding of how governance roles emerge, which governance practices are enacted and how these practices influence the achievement of digital transformation objectives.

This research therefore examines how Agile digital transformation projects are governed in Germany. It adopts a qualitative design grounded in a constructivist paradigm and follows an inductive approach using narrative inquiry. Eleven in-depth interviews were conducted with experienced project management practitioners who had led, supported or consulted on Agile transformation projects across several industries in Germany. The interviews were reconstructed into narrative restories and analysed using thematic analysis.

The findings show that hybrid project and governance settings represent the norm rather than the exception. Project governance roles adapt dynamically across project phases, while intermediary roles emerge to translate between governance layers and Agile teams. Effective governance depends on trust-based collaboration and clearly defined boundaries for team

autonomy. However, governance practices shift towards greater control when projects enter crisis mode or face increased complexity in multi-team settings.

This study contributes to the theoretical understanding of governance for Agile projects by providing practical insights that support governance executives and project managers in understanding and adapting governance systems for digital transformations.

Acknowledgements

I would like to express my gratitude to my supervisors, Prof Robin Bell and Dr Vessela Warren, for their invaluable guidance, support, and thoughtful advice throughout this entire journey. I also extend my gratitude to all my interview partners. Your expertise and support made this project possible. Thank you for your time and insights.

Dedicated to Nathalie

TABLE OF CONTENTS

1	Introduction.....	13
1.1	Background and context	13
1.2	Research problem	14
1.3	Research aim, questions and objectives	16
1.4	Research scope	17
1.5	Methodology and research design.....	17
1.6	Thesis structure.....	18
2	Literature review.....	20
2.1	Agile Projects and their management.....	23
2.1.1	Conceptual foundations of agility and Agile	23
2.1.2	Transition from plan-driven to Agile development.....	23
2.1.3	Conceptual comparison of traditional and Agile approaches.....	24
2.1.4	Agile Principles and project management.....	26
2.1.5	Frameworks and methods in Agile project management.....	26
2.1.6	Further development to Scaled Agile	27
2.1.7	Determinants of Agile project success	28
2.2	Governance.....	30
2.2.1	Conceptual foundations of corporate and organisational governance	30
2.2.2	Underlying theories and development.....	30
2.2.3	Influencing factors shaping governance.....	31
2.2.4	Agile methods in light of corporate governance theories	32
2.2.5	Agile governance	33
2.2.5.1	Foundations and evolution of Agile governance	33
2.2.5.2	Towards an Agile governance theory	34
2.3	Project governance	36
2.3.1	Conceptual foundations of project governance.....	36
2.3.2	Project governance paradigm.....	38
2.3.3	Internal and external views on project governance.....	38
2.3.3.1	Project governance dimensions.....	39
2.3.3.2	Project governance layers	40
2.3.4	Project governance elements and roles	41
2.3.4.1	Portfolio management.....	41
2.3.4.2	Steering Board	42
2.3.4.3	Programmes and projects.....	42
2.3.4.4	Project management offices	43

2.3.5	Project governance as a strategic link.....	44
2.3.6	Governance for Agile projects	46
2.3.6.1	Categorisation of Agile project governance practices	46
2.3.7	Evaluation criteria for project governance	49
2.4	Conclusion.....	51
2.5	Research gaps	55
3	Research methodology.....	58
3.1	Research philosophy.....	58
3.1.1	Positivism	59
3.1.2	Interpretivism.....	59
3.1.3	Critical Realism	60
3.1.4	Constructivism and rationale	61
3.2	Research strategy	62
3.2.1	Case Study.....	62
3.2.2	Grounded theory	63
3.2.3	Phenomenology	63
3.2.4	Narrative Inquiry and rationale	63
3.3	Data collection and generation	66
3.3.1	Setting and recruitment.....	66
3.3.2	Ethical considerations.....	68
3.3.3	Participant overview.....	69
3.3.4	Interview framework and questions.....	71
3.4	Narrative inquiry and narrative restories.....	74
3.4.1	Documenting Narrative Inquiry	74
3.4.2	Narrative restory structure	75
3.4.3	Narrative restories and rationale	75
3.4.4	Narrative dimensions	77
3.5	Data analysis.....	78
3.5.1	Data Analysis Process.....	78
3.5.2	Quality and rigour.....	80
3.6	Pilot interview	82
3.6.1	Participant background	82
3.6.2	Project Context and researcher Comment.....	82
3.6.3	Reflection on research method and adjustments.....	83
4	Restored Agile projects	85
4.1	Whistleblower System: Lean governance and regulatory pressure (Participant 1).....	85

4.1.1	Participant background	85
4.1.2	Project and organisational context	85
4.1.3	Project governance journey	85
4.1.4	Evolved understanding of project governance	89
4.1.5	Researcher comment and summary	89
4.2	Trading platform: Incremental delivery prior to Agile frameworks (Participant 2)	90
4.2.1	Participant background	91
4.2.2	Project and organisational context	91
4.2.3	Project governance journey	91
4.2.4	Evolved understanding of project governance	94
4.2.5	Researcher comment and summary	95
4.3	Collaboration Platform: Agile within a rigid contract setting (Participant 4)	96
4.3.1	Participant background	96
4.3.2	Project and organisational context	96
4.3.3	Project governance journey	97
4.3.4	Evolved understanding of project governance	100
4.3.5	Researcher comment and summary	101
4.4	SAP Rollout: Global steering meets local adaptation (Participant 5)	102
4.4.1	Participant background	102
4.4.2	Project and organisational context	103
4.4.3	Project governance journey	103
4.4.4	Evolved understanding of project governance	107
4.4.5	Researcher comment and summary	108
4.5	Global Product Platform: Reshaping Scaled Agile (Participant 6)	109
4.5.1	Participant background	109
4.5.2	Project and organisational context	109
4.5.3	Project governance journey	110
4.5.4	Evolved understanding of project governance	113
4.5.5	Researcher comment and summary	114
4.6	Finance Transformation: From greenfield to top-down governance (Participant 7)	
	115	
4.6.1	Participant background	116
4.6.2	Project and organisational context	116
4.6.3	Project governance journey	116
4.6.4	Evolved understanding of project governance	118
4.6.5	Researcher comment and summary	119
4.7	Sales 2.0: People-centred Governance (Participant 8)	120

4.7.1	Participant background	121
4.7.2	Project and organisational context	121
4.7.3	Project governance journey	121
4.7.4	Researcher comment and summary	123
4.8	Digital Product Delivery: Addressing addition bias (Participant 9)	125
4.8.1	Participant background	125
4.8.2	Project and organisational context	125
4.8.3	Project governance journey	126
4.8.4	Evolved understanding of project governance	128
4.8.5	Researcher comment and summary	129
4.9	New Technology Stack: Governance and vendor influence (Participant 10)	130
4.9.1	Participant background	130
4.9.2	Project and organisational context	130
4.9.3	Project governance journey	131
4.9.4	Evolved understanding of project governance	134
4.9.5	Researcher comment and summary	135
4.10	Data warehouse integration: Governance tensions and a protective layer (Participant 11)	136
4.10.1	Participant background	137
4.10.2	Project and organisational context	137
4.10.3	Project governance journey	137
4.10.4	Evolved understanding of project governance	140
4.10.5	Researcher Comment and summary	141
4.11	Global HR transformation: Navigating process standardisation and fear (Participant 12)	143
4.11.1	Participant background	143
4.11.2	Project and organisational context	144
4.11.3	Project governance journey	144
4.11.4	Evolved understanding of project governance	147
4.11.5	Researcher comment	148
5	Findings and discussion	150
5.1	Narrative Analysis	150
5.2	Derived themes and subthemes	152
5.2.1	Roles shaping governance of Agile projects	154
5.2.1.1	PMO and sponsors as central governance actors	154
5.2.1.2	Role conflicts and dependencies within the governance system	155

5.2.1.3	Limits of formal governance structures.....	157
5.2.1.4	Discussions on governance roles for Agile projects.....	159
5.2.2	Applied governance practices	160
5.2.2.1	Agile method selection and hybrid approaches.....	161
5.2.2.2	Steering and escalation mechanisms	163
5.2.2.3	Organisational integration enabling practices.....	165
5.2.2.4	Discussions on governance practices for Agile projects	166
5.2.3	Influence on the achievement of digital transformation.....	169
5.2.3.1	Factors influencing team autonomy and efficiency	169
5.2.3.2	External constraints as barriers to agility	171
5.2.3.3	Trust-based governance mechanisms.....	173
5.2.3.4	Understanding of agility.....	174
5.2.3.5	Discussions on the influence of achieving digital transformation.....	175
6	Conclusion	179
6.1	Answering Research Question 1	179
6.2	Answering Research Question 2	181
6.3	Answering Research Question 3	184
6.4	Synopsis of findings	187
6.5	Reflections on research design.....	190
6.6	Research contributions	191
6.7	Practical contributions	194
6.8	Transferability of the findings	196
6.9	Limitations and further research	197
6.10	Personal reflection.....	198
	References.....	200

LIST OF FIGURES

Figure 1: Levels of governance (Taborda & Mohammed, 2021)	21
Figure 2: Literature review relevance tree (author's own).....	22
Figure 3: Project triangles (Kisielnicki & Misiak, 2017)	25
Figure 4: Project success and moderating factors (Ciric Lalic et al., 2022)	29
Figure 5: Agile governance theory mapping, author's own based on Luna and Marinho (2023).....	35
Figure 6: Governance structures (Too & Weaver, 2014).....	41
Figure 7: Governance system as interface (Musawir, 2023).	45
Figure 8: Functions of effective project governance (Too et al., 2017)	50
Figure 9: Project governance dimensions (Kujala et al., 2021)	51
Figure 10: Intersection of the research fields (author's own).....	53
Figure 11: Sensitising framework (author's own)	84
Figure 12: Governance dynamics and influencing factors (author's own).....	190

LIST OF TABLES

Table 1: Characteristics of Waterfall and Agile approaches (Kisielnicki & Misiak, 2017)	25
Table 2: Overview of Agile governance meta values (Luna et al., 2016)	34
Table 3: Agile governance hypotheses (Luna et al., 2020)	35
Table 4: Project governance practices comparison	47
Table 5: Overview of Agile project governance practices (Lappi et al., 2018)	49
Table 6: Participant overview	70
Table 7: Narrative interview phases	73
Table 8: Narrative analysis process	79
Table 9: Illustrative code extraction and organisation	151
Table 10: Illustrative cyclic coding and derivation of subthemes and themes.....	151
Table 11: Cross-check for code distribution per theme	152
Table 12: Overview of themes and subthemes.....	153
Table 13: Findings related to RQ1.....	181
Table 14: Findings related to RQ2.....	184
Table 15: Findings related to RQ3.....	187
Table 16: Synopsis of the findings.....	189

ABBREVIATIONS

APM: Association for Project Management

BDI: Federation of German Industries

CSR: Corporate Social Responsibility

CTO: Chief Technology Officer

DAD: Disciplined Agile Delivery

ERP: Enterprise Resource Planning

GLOBE: Global Leadership and Organizational Behaviour Effectiveness

HR: Human Resources

IEEE: Institute of Electrical and Electronics Engineers

ISACA: Information Systems Audit and Control Association

IT: Information Technology

KPI: Key Performance Indicator

LeSS: Large Scale Scrum

OECD: Organisation for Economic Co-operation and Development

OGC: Office of Government Commerce

OKR: Objectives and Key Results

PMI: Project Management Institute

PMO: Project Management Office

PRINCE2: Project in Controlled Environments

QBR: Quarterly Business Review

ROI: Return on Investment

SAFe: Scaled Agile Framework

SME: Subject Matter Expert

XP: Extreme Programming

1 INTRODUCTION

1.1 BACKGROUND AND CONTEXT

Organisations increasingly operate in complex and ambiguous environments, where competitive pressure, technological change and economic turbulence heighten the need for innovation (Eisenhardt et al., 2010). A growing body of research emphasises that organisational survival and competitiveness depend on the ability to respond to environmental change in a timely and flexible manner (Teece et al., 2016). As a result, organisations have increasingly implemented organisation-wide change through digital transformation, particularly to transform their digital offerings, processes and business models (Fuchs & Hess, 2018).

For decades, traditional project delivery methods, such as the Waterfall model, have been the standard approach to managing complex projects. These methods emphasise linear planning, strict phase separation, and centralised control. While they offer stability in predictable environments, they are increasingly criticised for their delayed responses to market shifts and limited adaptability. Consequently, they are no longer seen as adequate in today's fast-paced and uncertain conditions (Dima & Maassen, 2018; Nyandongo & Khanyile, 2019).

For this reason, Agile approaches have gained prominence across industries, with organisations increasingly adopting them to support digital transformation initiatives (Fuchs & Hess, 2018). These approaches enable organisations to better align with the accelerated pace of change by emphasising flexibility, iterative development and close customer collaboration (Lappi et al., 2018; Nyandongo & Khanyile, 2019). However, research also shows that when the organisational context conflicts with Agile principles, implementation often encounters resistance (Khalil & Khalil, 2016), particularly because of challenges related to existing processes, planning structures, and established roles and responsibilities (Lappi et al., 2018; Musawir, 2023).

In examining the factors that promote Agile project success, studies highlight the importance of the organisational context, particularly in relation to processes and governance. In their systematic literature review, Sithambaram et al. (2021) identified project governance as the most frequently cited success factor. Project governance refers to the systems and processes through which projects are directed and controlled, accountability is defined, and strategic alignment and effective delivery are ensured (McGrath & Whitty, 2015; Nyandongo & Khanyile,

2019). Agile approaches, by contrast, are characterised by iterative planning, team autonomy and the need for flexibility (Berger, 2007; Taborda & Mohammed, 2021; Nyandongo & Khanyile, 2019).

The German context illustrates these challenges. A 2025 study by the Federation of German Industries (BDI) highlights Germany's lag in digital transformation compared with other countries. Innovation performance has stagnated despite high investment in research and development, pointing to challenges in organisational implementation (BDI, 2025). A survey on the challenges of Agile projects in Germany further supports this interpretation. In total, 62% of surveyed companies identified internal processes and top management as the primary challenges for Agile projects (Komus, 2020), both of which are rooted in the governance system. This underscores the relevance of investigating the governance of Agile projects in greater depth.

1.2 RESEARCH PROBLEM

Project governance has been identified as a critical success factor in project management. Empirical evidence shows that project governance contributes significantly to improved project outcomes by reducing costs, enhancing quality and increasing overall business value (Joslin & Müller, 2016; Lechler & Dvir, 2010). Understanding how governance is applied in relation to Agile projects is therefore not only a theoretical concern but also critical to the success of digital transformation initiatives.

Research has long provided limited empirical evidence on how Agile projects interact with governance frameworks (Janssen & van der Voort, 2016; Lappi et al., 2018). Existing studies on project governance largely draw on concepts developed for linear, plan-driven environments characterised by formalised planning and centralised control (Ahola et al., 2014; Taborda & Mohammed, 2021; Müller et al., 2014; Samset & Volden, 2016). Recent studies indicate that this gap persists, as organisations continue to experience tensions when aligning Agile project-level delivery with traditional governance structures, particularly in relation to decision-making in hybrid or scaled Agile environments (Henriquez et al., 2025; Nyandongo, 2024). Luna et al. (2014b) noted that the literature remains scattered rather than cumulative, partly because of ambiguity about what governance means in practice (McGrath & Whitty, 2020). The governance of Agile projects, in particular, is a multidisciplinary field that remains underexplored in empirical research (Luna et al., 2020).

Although project governance frameworks exist in the literature (Kujala et al., 2021), less is known about how they are adapted and applied in day-to-day practice, particularly in Agile projects (Lappi et al., 2018). Scholars have therefore called for a theoretical shift that accounts for Agile principles, as well as further empirical studies that verify governance practices and examine how organisations integrate Agile and traditional governance models in practice (Luna et al., 2023; Nyandongo & Khanyile, 2019). At the same time, other scholars question the extent to which governance and agility are conceptually compatible (Taborda & Mohammed, 2021).

This unresolved tension creates practical uncertainty for organisations seeking governance arrangements that support Agile delivery while maintaining accountability. A global survey by Nyandongo and Khanyile (2019) found that 36% of organisations had no governance framework in place for Agile projects, while 7% perceived existing frameworks as obstructive. A further 7% stated that they did not understand what such a framework entailed. These findings indicate both a lack of practical guidance and continuing conceptual uncertainty around governance in Agile settings.

Against this background, a framework-focused perspective does not fully capture how governance is realised in Agile projects. Governance can instead be understood as being shaped through the actions of people in specific roles and through the practices they perform. Examining these roles and practices is therefore important for understanding how governance operates in Agile project environments.

The German context is particularly relevant because many organisations operate within bureaucratic structures shaped by a cultural tendency towards uncertainty avoidance and formalisation. Germany scores highly on uncertainty avoidance, reflecting preferences for detailed planning, formalised approval processes and comprehensive documentation (Hofstede, 2001; Hofstede et al., 2010). The GLOBE study independently confirms this pattern, describing German organisational practices as emphasising systematic procedures and decision-making (Brodbeck & Frese, 2008). Although organisations value predictability and stability, these conditions also influence the implementation of governance in Agile projects (Boehm & Turner, 2005). A representative 2025 survey of 603 German companies provides current empirical support for these patterns. Lengthy decision-making processes and limited organisational risk appetite are among the most frequently cited internal obstacles to digital transformation, with 53% of companies reporting difficulties in managing transformation, compared with 34% in 2022 (Bitkom, 2025).

This setting contrasts with the cultural contexts in which Agile principles originated, which are characterised by lower uncertainty avoidance and greater tolerance for ambiguity. Against this background, the Innovation Indicator 2025 reports that Germany ranks 12th in international comparison and that the innovation performance of German companies has deteriorated, particularly in relation to digitalisation. It further states that Germany lags in the digitalisation of goods and services, contributing to a decline in competitiveness (BDI, 2025) and difficulties in managing transformation (Bitkom, 2025). This combination of formalised organisational conditions, documented difficulties in digital transformation and increasing Agile adoption motivates the present focus on the German context.

1.3 RESEARCH AIM, QUESTIONS AND OBJECTIVES

Motivated by these unresolved tensions and the limited insight into how governance is carried out in day-to-day project work, this study explores how project governance takes place in Agile digital transformation projects in Germany.

By examining how governance is applied in everyday project practice, the study seeks to generate practical insights into how governance functions in real-world Agile contexts. Building on the research problem identified above, it focuses on the roles of the actors involved in governing Agile projects, the practices they perform and their influence on digital transformation outcomes.

The study focuses specifically on digital transformation projects. Agile methods originated in software development (Beck et al., 2001), and iterative delivery, customer collaboration and emergent requirements remain defining characteristics of Agile work (Beck, 2001). This makes software-based digital transformation projects a particularly relevant setting in which governance tensions are likely to emerge, offering meaningful insight into how governance adapts to Agile ways of working. By focusing on how project governance is experienced by those involved, the study addresses the following research questions:

Research questions:

- RQ1: What governance roles are experienced in Agile digital transformation projects?
- RQ2: What governance practices are carried out by project governance actors in Agile digital transformation projects?
- RQ3: How do these governance roles and practices influence the achievement of digital transformation in Agile projects?

Research objectives:

- RO1: To identify the governance roles experienced in Agile digital transformation projects.
- RO2: To explore the governance practices carried out by project governance actors in Agile digital transformation projects.
- RO3: To explore how governance roles and practices influence the achievement of digital transformation in Agile projects.

1.4 RESEARCH SCOPE

To examine governance as a sociotechnical phenomenon (Luna et al., 2014b), this study places people at the centre of the inquiry. Although governance is enacted by actors, this research focuses specifically on the roles they occupy, as these roles define responsibilities within governance structures (Müller, 2009). In this study, project governance is operationalised through governance roles, the practices through which governance is shaped, and their influence on the achievement of project success.

Project success is treated as a multidimensional theoretical construct that extends beyond the traditional iron-triangle constraints of time, cost and scope (Atkinson, 1999). It also encompasses efficiency, impact on the team and customer, business success, and preparation for the future (Ciric Lalic et al., 2022; Shenhar & Dvir, 2007). In this study, the achievement of digital transformation is used as the operationalised form of project success, referring to the innovation and integration outcomes of the project (Chang & Chen, 2025). The theoretical foundation for this conceptualisation is established in Section 2.1.7, which discusses the determinants of Agile project success.

The findings aim to support governance decision-makers and project managers by clarifying which governance roles and practices are effective and necessary in Agile digital transformations. From an academic perspective, the results extend current understanding of project governance by integrating Agile-specific elements and providing a more differentiated view of how governance functions in practice.

1.5 METHODOLOGY AND RESEARCH DESIGN

This study adopts a qualitative research design grounded in a constructivist paradigm and follows an exploratory, inductive approach. Given that Agile projects are shaped by interactions among multiple organisational actors, narrative inquiry was selected as the

research strategy to capture how governance roles and practices are experienced over time, rather than treating governance solely as a formal structure.

Data generation was based on in-depth narrative interviews with experienced project management professionals involved in Agile projects across different organisational contexts. The interviews focused on participants' experiences of project governance and their reflections on the achievement of digital transformation objectives. Each interview was first reconstructed into a narrative restory to preserve the contextual richness of individual governance experiences.

These narrative restories formed the foundation for the subsequent analytical phase. Building on the restories, the study applied Braun and Clarke's (2006) thematic analysis. Through the iterative coding of the 11 narrative interviews, governance roles, practices and recurring patterns were identified and examined across different project contexts. This analysis made it possible to distinguish recurring tensions while preserving the specific contexts in which they occurred.

1.6 THESIS STRUCTURE

This thesis comprises six chapters. This first chapter introduces the background and context of the study and outlines the rationale for the research. It defines the research problem, establishes the research objectives and questions, and delineates the scope of the investigation.

The second chapter provides the theoretical foundation for the study. It reviews existing research in three core areas: Agile project management; governance, including corporate governance and Agile governance; and project governance in both traditional and Agile settings. The chapter concludes by identifying the research gaps and developing a conceptual framework that connects these theoretical perspectives. To bridge theory and practice, an additional section outlines current market solutions and governance approaches applied in Agile transformation contexts.

The third chapter describes the research methodology and design. It explains the philosophical positioning of the study within a constructivist paradigm, the adoption of a qualitative approach and the choice of narrative inquiry as the research strategy. The chapter also details the processes of data collection and analysis, supported by a pilot interview used to validate the research design and refine the data collection instruments.

The fourth chapter presents the empirical foundation of the study. It introduces the narrative accounts of the interview participants, each situated within its organisational context. These restories provide in-depth insight into how governance roles, practices and interactions are experienced within Agile project environments and form the basis for the subsequent thematic analysis.

The fifth chapter consolidates the results of the narrative analysis and discusses them in relation to the research questions. The findings are organised into themes and subthemes that capture governance roles, governance practices and the achievement of digital transformation objectives. This chapter also reflects on how the empirical results relate to existing governance frameworks and theoretical perspectives, identifying where they confirm, extend or challenge prior research.

The final conclusion chapter summarises the main findings and answers the research questions. It presents the study's contributions to research and practice, including implications for governance design in Agile projects. The chapter further discusses the transferability and limitations of the results and concludes with recommendations for future research, as well as a personal reflection on the research process.

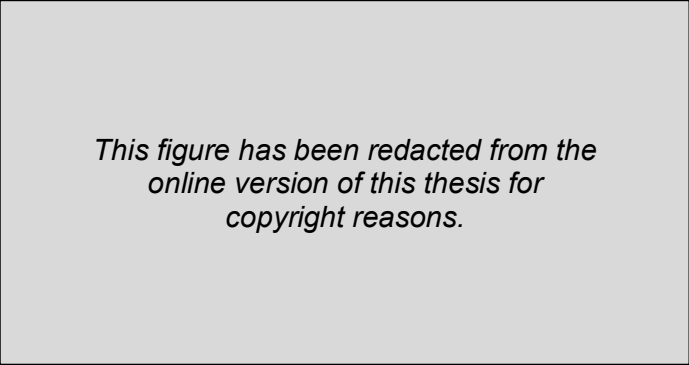
2 LITERATURE REVIEW

This chapter provides the theoretical foundation for the study by examining existing research on Agile projects, governance and project governance. These areas are explored in relation to the research aim, objectives and questions. Given the breadth of the subject, the review considers and evaluates literature from multiple perspectives to identify contributions that support the research focus (Jankowicz, 2005; Saunders et al., 2019).

The literature review synthesises theoretical and empirical work across three domains derived from the research questions: Agile projects, governance and project governance. As existing knowledge on Agile project governance remains scattered (Luna et al., 2014b), the review critically assesses contributions from different research fields to identify conceptual gaps and areas requiring further investigation. These domains provide the basis for classifying key concepts and supporting the development of the research framework.

The review draws on both books and peer-reviewed journal articles accessed through institutional full-text databases. Recent publications were prioritised to capture current developments in the field, while foundational works were included regardless of publication date where they contributed to the theoretical framework. The search focused primarily on English-language publications, with an emphasis on software development and digital transformation contexts, while relevant German studies were also included. Search terms included “governance” and “project management”, as well as combinations such as “Agile project governance” and “Agile governance” to refine the search.

To determine the relevant fields, the review is organised around the three levels of governance proposed by Taborda and Mohammed (2021): organisational governance, project governance and project management. At each level, traditional and Agile perspectives are reviewed in parallel to develop an integrated understanding of the fields and their interconnections.



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Figure 1: Levels of governance (Taborda & Mohammed, 2021)

A relevance tree guided the review (Hart, 2018; Saunders et al., 2019; Sharp et al., 2002). The tree uses the governance levels proposed by Taborda and Mohammed (2021) as its primary structure: organisational governance, project governance and project management. This structure was adopted because it reflects the relationship between these levels and helps identify where tensions between governance and Agile approaches emerge.

The field of Agile projects provides the background for all three research questions, as it defines the specific Agile roles, practices and understandings of project success that distinguish these projects from classical project settings. Building on this foundation, the fields of governance and project governance offer a deeper view of the structures and mechanisms through which Agile projects are steered. This perspective is particularly relevant to Research Questions 1 and 2, which examine the governance roles and practices experienced in Agile digital transformation projects. The relevance tree in Figure 2 reflects this layered logic by narrowing from the broader Agile project context towards the governance interfaces that define the focus of this study.

Areas such as organisational agility were excluded from the review because they operate at a level above the governance focus of this research. Similarly, operational aspects of Agile team practices were excluded because they fall below the project level relevant to the analysis.

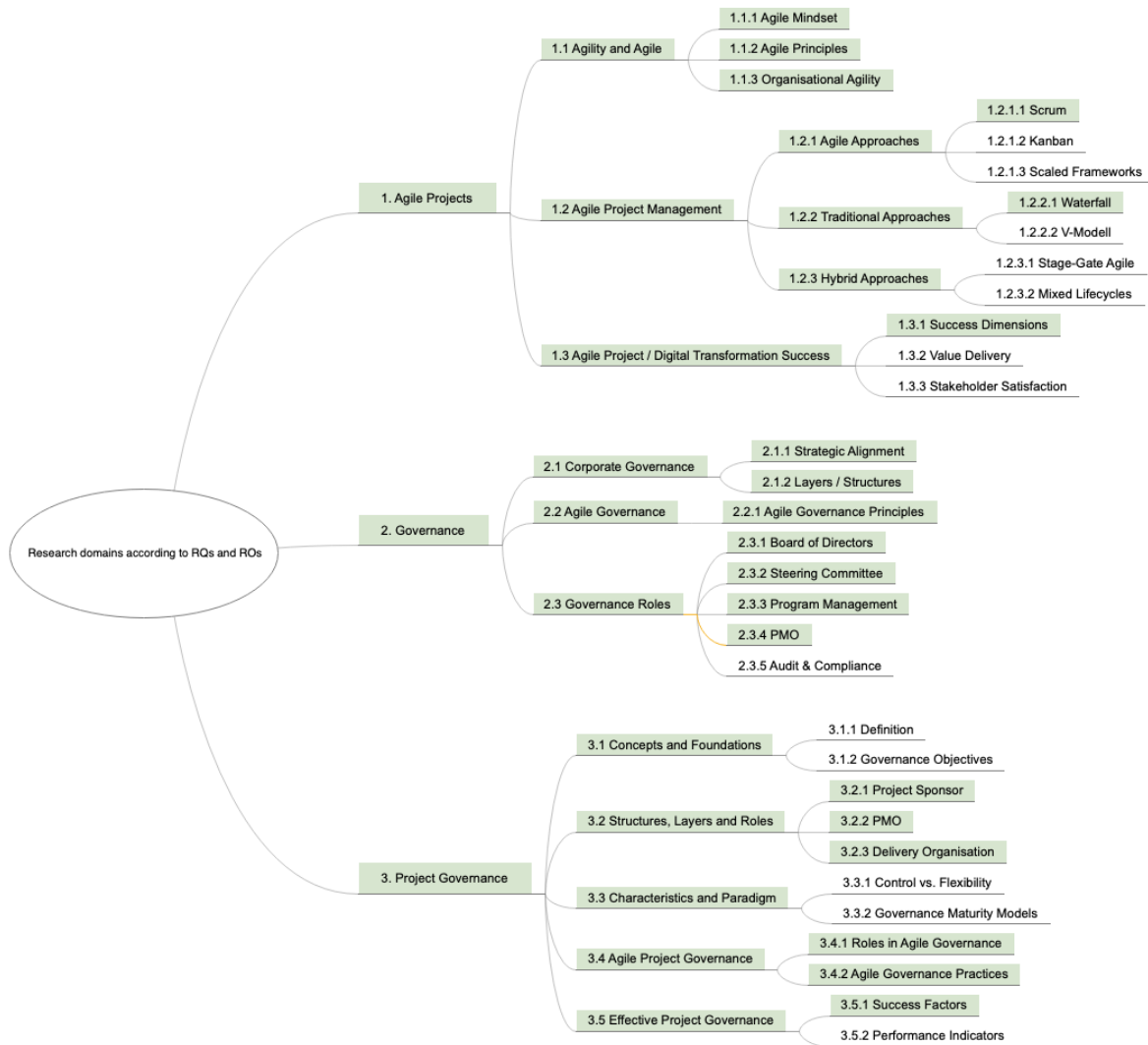


Figure 2: Literature review relevance tree (author's own)

The literature review comprises three sections from which the research questions of this study are derived. Section 2.1 reviews Agile projects and their management, including Section 2.1.7 regarding determinants of Agile project success, which is operationalised in this study as the achievement of digital transformation objectives (RQ3). This understanding is established before governance roles and governance practices are examined as factors that shape project success.

Section 2.2 examines governance as the relevant organisational construct and provides the conceptual foundation for project governance. Section 2.3 then develops project governance in depth by investigating its structural elements and roles (RQ1), as well as governance

practices (RQ2). Section 2.4 synthesises the findings, while Section 2.5 derives the specific research gaps addressed by the study.

2.1 AGILE PROJECTS AND THEIR MANAGEMENT

This first section of the literature review aims to define the concept of an Agile project and position it within the tension between classical and modern project management approaches. It focuses on the characteristics of Agile projects, how they differ from Agile project management, and how this development has emerged from traditional project logics.

2.1.1 CONCEPTUAL FOUNDATIONS OF AGILITY AND AGILE

Over the past two decades, academic interest in this field has increased considerably. Hoda et al. (2018) conducted a Google Scholar search in 2018 and identified more than 260,000 results for “Agile software development”, compared with just over 13,000 results before 2001. They interpreted this as an indicator of Agile’s expanding influence in both research and practice. They also identified ten major research themes, including Agile adoption, methods, practices, human and social factors, and organisational agility. Early research focused primarily on foundational issues such as method development, team practices and the social dynamics of Agile teams. Despite the widespread adoption of Agile methods, many organisations still regard themselves as being in a process of ongoing Agile maturation. Research therefore continues to play a critical role in analysing these evolving challenges and supporting practitioners in addressing them effectively.

In both practical and academic contexts, the term agility is often used interchangeably with more familiar terms such as responsiveness (Mergel et al., 2021). Kruchten (2010) describes agility as the “ability of an organisation to react to changes in its environment faster than the rate of these changes”. While Kruchten’s definition focuses on the purpose of agility for organisations (Luna et al., 2014b), Agile itself is identified as a specific set of practices and principles aimed at improving software development processes (Albera et al., 2023; Beck et al., 2001).

2.1.2 TRANSITION FROM PLAN-DRIVEN TO AGILE DEVELOPMENT

The discipline of software engineering emerged in the 1970s, introducing formal processes, documentation and project management practices intended to bring greater rigour and scalability to software development (Hoda et al., 2018). Process models introduced during this

period included the Waterfall model. Although the model is often associated with Royce (1970), Royce himself characterised the sequential approach as risky and likely to fail in practice (Boehm, 1988). Despite this, the Waterfall model became established as a methodological standard, including in software development projects (Crespo-Santiago & Cosme, 2011).

The Waterfall approach assumes that projects are relatively straightforward and have clear boundaries, allowing for detailed planning without significant changes during implementation (Boehm, 2002; Boehm & Turner, 2005). As the complexity of software development increased, Agile approaches began to take shape in the late 1990s. Their common principles were formally articulated in the Agile Manifesto in 2001 (Hoda et al., 2018; Nyandongo & Khanyile, 2019).

The Agile Manifesto presents four key values and 12 principles designed to improve the software development process. It emphasises individuals and interactions over processes and tools, working software over comprehensive documentation, customer collaboration over contract negotiation, and responding to change over following a plan. According to the Agile Manifesto, project success should be determined primarily by customer satisfaction and by the early and continuous delivery of working software (Beck et al., 2001). As organisations began to adopt Agile methods and report success stories (Misra et al., 2012), several criticisms also emerged in the literature. For example, Mahanti (2006) highlights the early limited support for developing large and complex software systems.

Overall, the term Agile is also used to describe the broader approach and the methods based on it, which are characterised by adaptability, iterative and incremental development, and a strong focus on people (Abbas et al., 2008). This understanding is adopted in the present study and is explored further in the next section.

2.1.3 CONCEPTUAL COMPARISON OF TRADITIONAL AND AGILE APPROACHES

Kisielnicki and Misiak (2017) summarise the differences between traditional and Agile approaches. In traditional approaches, project features or scope are typically defined first and then used to determine cost and time. In Agile approaches, by contrast, time and cost are prioritised, while project scope is adjusted accordingly, as illustrated in Figure 3. In this research, Agile approaches are therefore classified as approaches that focus on delivering value and quality during development, while time, cost and quality remain relatively constant and scope is expected to change (Kisielnicki & Misiak, 2017).

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Figure 3: Project triangles (Kisielnicki & Misiak, 2017)

However, the project triangle alone does not fully capture the deeper conceptual differences between traditional and Agile approaches, as summarised by Kisielnicki and Misiak (2017). Waterfall projects are grounded in predictability, linear processes and detailed up-front planning, which typically supports governance through hierarchical and command-driven structures. By contrast, Agile projects differ more fundamentally in their assumptions about control, collaboration and the role of individuals in complex and uncertain environments. They are exploratory in nature and operate through decentralised decision-making and self-organising teams. Leadership shifts from directive authority towards a facilitative and servant-oriented role. Agile approaches continuously refine requirements based on business value and stakeholder feedback, thereby redefining how value is created and measured.

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Table 1: Characteristics of Waterfall and Agile approaches (Kisielnicki & Misiak, 2017)

The distinctions between approaches in the literature might suggest an either-or choice between Waterfall and Agile. However, combining elements of both gives rise to hybrid approaches, which seek to integrate the structured nature of Waterfall with the flexibility of Agile in order to exploit their combined strengths (Cobb, 2011). Such approaches are considered necessary for certain complex projects because they support a balance between control and flexibility that can be tailored to different stages of the project lifecycle (Azenha et

al., 2021; Boehm, 2002). However, hybrid approaches also involve considerable complexity, as they represent situational combinations that do not have the clearly defined characteristics of either Agile or Waterfall (Gablas et al., 2018).

In conclusion, Agile approaches, which form the basis of Agile project management, differ significantly from Waterfall approaches. At this stage of the study, these differences already indicate that project governance must take account of the specific characteristics of Agile projects.

2.1.4 AGILE PRINCIPLES AND PROJECT MANAGEMENT

According to Larson and Gray (2018), projects help realise an organisation's vision by translating strategic plans into action, while project management involves the application of knowledge, skills and techniques to meet project objectives (PMI, 2021).

Agile project management, grounded in the Agile Manifesto, is particularly beneficial in environments that require innovation and adaptability, as it accommodates evolving requirements through short, iterative cycles (Kumar & Shankar, 2016; Lei et al., 2017). Research indicates that Agile methods can increase project success rates, enhance flexibility, optimise processes and ensure that value is continuously delivered to the customer (Boehm, 2002; Dingsøyr et al., 2012; Novac & Ciochină, 2018; Serrador & Pinto, 2015). Nevertheless, their adoption is not without challenges. Conflicts with existing business processes, the need for extensive documentation and Agile's preference for small, self-organising teams can create barriers to implementation (Boehm & Turner, 2005). In addition, the focus on short-term objectives may detract from long-term goals, while the iterative nature of Agile work can complicate the inclusion of projects in organisational portfolios and make project progress and value more difficult to assess (Cooper & Sommer, 2019). These challenges are particularly relevant to the present study because they directly affect how governance systems steer, monitor and evaluate Agile projects.

2.1.5 FRAMEWORKS AND METHODS IN AGILE PROJECT MANAGEMENT

Agile methods form the core of Agile project management (Cervone, 2011; Highsmith, 2010). They enhance team productivity by focusing on short-term results while remaining responsive to future uncertainty (Beck et al., 2001; Kisielnicki & Misiak, 2017).

By 1995, it was increasingly recognised that conventional project management techniques were not fully capable of addressing the dynamics of software development projects (Cervone, 2011). The growing popularity of Agile project management methods is therefore grounded in their ability to accommodate changing customer requirements efficiently through iterative development (Kisielnicki & Misiak, 2017).

Each iteration includes the stages of design, development and testing. Because delivery is iterative, the design remains flexible and can be adapted even late in the development process. Agile teams are cross-functional, meaning that they possess the knowledge and skills required to produce the intended output, and they are self-organising. As a result, the design phase is never fully finalised; instead, changes can be incorporated as new ideas arise during each iteration. Greater importance is placed on delivering working software quickly than on producing extensive documentation. Customers can be shown demonstrations at the end of each iteration, and their feedback can inform improvements in the next cycle (Kisielnicki & Misiak, 2017).

Scrum and Kanban are among the established methods used in Agile project environments (Lei et al., 2017). Despite their structural differences and distinct areas of emphasis, both are rooted in the values of the Agile Manifesto (Beck et al., 2001).

Scrum is an iterative framework that defines fixed roles, including the Product Owner, Scrum Master and development team; specific artefacts, such as the Product Backlog, Sprint Backlog and Increment; and recurring events, including Sprint Planning, Daily Scrum, Sprint Review and Sprint Retrospective. Work is organised into sprints, typically lasting two to four weeks, with the aim of delivering a potentially shippable product increment (Sutherland & Schwaber, 2013).

Kanban, by contrast, is based on visual control through a Kanban board, the limitation of work in progress and continuous improvement through feedback loops. Kanban does not prescribe specific roles or iterations (Anderson, 2010), which makes it particularly flexible. However, the choice of method depends on the specific project context, including the pace of change, team size and technical complexity (Alqudah & Razali, 2017).

2.1.6 FURTHER DEVELOPMENT TO SCALED AGILE

The adoption of Agile methods in projects and small teams has led organisations to extend these practices to large-scale projects, often involving hundreds of employees distributed

across multiple locations (Almeida & Espinheira, 2021). To address the specific challenges of such settings, various frameworks have emerged in recent years that seek to embed Agile principles beyond individual teams and across entire organisations (Conboy & Carroll, 2019).

One example is Large-Scale Scrum (LeSS), which uses a shared product backlog and synchronised sprints to connect multiple teams under a single product vision (Larman & Vodde, 2016).

For organisations seeking to implement Agile practices not only in isolated projects but systematically across the enterprise, the Scaled Agile Framework (SAFe) has become widely established. SAFe is explicitly tailored to large corporate contexts and structures its approach across three levels: team, programme and portfolio (Leffingwell, 2011). A key concept is the Agile Release Train, which organises multiple long-term Agile teams that deliver incremental outcomes on a quarterly basis. This structure is supported by defined roles such as product manager, system architect and release train engineer (Turetken et al., 2017).

Even so, selecting an appropriate framework often remains challenging for organisations, as comparative evaluation models are lacking. This has, in some cases, contributed to the failure of transformation initiatives (Conboy & Carroll, 2019).

2.1.7 DETERMINANTS OF AGILE PROJECT SUCCESS

The concept of project success has evolved over time and remains contested in project management research (Ciric Lalic et al., 2022). Traditionally, success was defined narrowly in terms of delivering a project on time, within budget and according to specified quality requirements, as captured by the so-called ‘triple constraint’ (Atkinson, 1999). However, researchers increasingly advocate a multidimensional understanding of project success that also considers organisational impact, end-user satisfaction and alignment with strategic goals (Shenhar et al., 2001). From this perspective, success in digital transformation projects is increasingly assessed by the extent to which intended innovation and integration outcomes are realised (Chang & Chen, 2025).

In Agile settings, Serrador and Pinto (2015) propose two key dimensions for evaluating project success. The first is project efficiency, which refers to the achievement of cost, time and scope goals. The second is stakeholder success, defined as the extent to which the expectations of stakeholders are satisfied, with stakeholders serving as the ultimate judges of project success. Flexibility, close customer collaboration and iterative delivery therefore contribute to a more

detailed understanding of the determinants of project success in Agile projects (Serrador & Pinto, 2015).

Similarly, Ciric Lalic et al. (2022) conceptualise project success as a multidimensional phenomenon. They investigated the impact of traditional, Agile and hybrid project management approaches across various contextual conditions, with their findings confirming the particular relevance of success moderators in Agile projects. These moderating factors include both industry-specific conditions and dimensions that apply across contexts. First, industries differ in their project needs depending on project and organisational type, which can affect project success (Ciric Lalic et al., 2022). Second, drawing on the work of Shenhar and Dvir (2007), project novelty, technology, complexity and pace are integrated as context-independent factors (Ciric Lalic et al., 2022).



Figure 4: Project success and moderating factors (Ciric Lalic et al., 2022)

Figure 4 (Ciric Lalic et al., 2022), reproduces this framework and illustrates that project success is not determined by delivery practices alone, but by the interaction between those practices and the surrounding project context. For this study, the framework provides the conceptual basis for understanding project success in Agile digital transformation projects as a context-dependent rather than universal phenomenon.

In summary, the literature reviewed in this section offers a multidimensional conceptualisation of project success: from the iron-triangle constraints of time, cost and scope (Atkinson, 1999), through Shenhar and Dvir's (2007) five dimensions of efficiency, customer impact, business success, team impact and preparation for the future, to Serrador and Pinto's (2015) Agile-

specific dimensions of project efficiency and stakeholder success, and Ciric Lalic et al.'s (2022) context-specific perspective. However, what remains insufficiently investigated is how project governance connects to these success dimensions specifically in Agile digital transformation settings. The studies reviewed explain what project success is, but they do less to examine how governance roles and practices influence its achievement. On this conceptual basis, governance is introduced as a contextual factor in the next section, while the unexplored connection between governance and project success motivates Research Question 3.

2.2 GOVERNANCE

The following section examines the field of governance by outlining key definitions and fundamental concepts. This provides the basis for the subsequent discussion, as Young (2021) suggests that project governance can be better understood through corporate governance theories. The section first defines and contextualises governance at the organisational level, before exploring Agile governance in depth as a relatively recent field of research.

2.2.1 *CONCEPTUAL FOUNDATIONS OF CORPORATE AND ORGANISATIONAL GOVERNANCE*

Corporate governance refers to the system by which companies are directed and controlled. It emphasises the responsibility of stakeholders to align their interests effectively (Cadbury Report, 1992) and concerns the relationships between a company's management, board, shareholders and other stakeholders (OECD, 2004).

Corporate governance is designed to protect the interests of investors, shareholders and other stakeholders (Yusoff & Alhaji, 2012), while the board of directors plays an essential role in ensuring its implementation (Younas, 2022). Müller (2009) is a key contributor to the governance literature and uses the terms corporate governance and organisational governance synonymously. However, this study uses the term corporate governance, as this is the term most commonly used in the literature reviewed.

2.2.2 *UNDERLYING THEORIES AND DEVELOPMENT*

Corporate governance is best understood through its underlying theories, which explain the relationships, motivations and external influences that shape its conceptualisation and practice. Frameworks such as agency theory, stewardship theory, stakeholder theory,

corporate social responsibility and ethics theory each provide valuable perspectives on the factors influencing the development of corporate governance (Zuva & Zuva, 2018).

The discourse on corporate governance has historically evolved along several theoretical lines, which continue to shape the field today. Agency theory initially highlighted the separation of ownership and control, positioning governance structures as mechanisms for addressing conflicts of interest between shareholders and managers (Jensen & Meckling, 1976). From this perspective, the organisation is viewed as a set of contracts between shareholders, as principals, and managers, as agents appointed to act on their behalf (Clarke, 2004). This separation of ownership and control creates the potential for conflicts of interest when managers pursue goals that do not fully align with those of shareholders (Daily et al., 2003).

By contrast, stewardship theory proposes that managers act as responsible stewards whose objectives are closely aligned with those of the owners, protecting and enhancing shareholder wealth through the success of the firm (Davis et al., 1997). This perspective emphasises trust and autonomy, suggesting that when managers are given the freedom to act, they are inclined to maximise both the firm's financial position and shareholder returns (Daily et al., 2003).

Stakeholder theory later extended the focus beyond shareholders to include all groups or individuals who can affect, or are affected by, the achievement of organisational objectives, such as customers, employees and suppliers. From this perspective, the firm is understood as a collection of stakeholders whose interests must be managed to ensure long-term success (Freeman, 1984).

This broader view was further reinforced by ethical considerations and concepts of corporate social responsibility (CSR), which underline that corporate governance is not a monolithic construct. Instead, it has been shaped by the intersection of several theories, particularly agency theory and stewardship theory (Zuva & Zuva, 2018).

2.2.3 INFLUENCING FACTORS SHAPING GOVERNANCE

Governance is dynamic and shaped by both internal and external factors. Internally, it is influenced by the relationships between shareholders and stakeholders in the pursuit of organisational value. Externally, factors such as access to finance, business partnerships, mergers and acquisitions, globalisation, and developments in communication and information technology all play a significant role in shaping governance mechanisms (Zuva & Zuva, 2018). These aspects are explored in more detail in the following sections.

Internal governance factors comprise the mechanisms and processes through which an organisation manages and coordinates its internal operations. These include guiding organisational actions, defining responsibilities and setting internal standards. Such mechanisms form integral parts of the organisational system and must therefore be understood and managed as part of that system if governance is to be effective (Kelly, 2010). Internal governance mechanisms are primarily shaped by the roles of boards of directors and audit committees, as summarised by Zuva and Zuva (2018). Underpinned by agency theory, the board has a responsibility to shareholders to oversee risk management and ensure compliance with legal requirements (Deli & Gillan, 2000).

External governance factors shape corporate behaviour through laws, ownership patterns, international operations and board interconnections. Agency theory is again relevant here, as companies must comply with regulatory and legislative requirements that reflect each country's context, history and traditions, all of which can influence corporate performance. CSR perspectives broaden this view by emphasising corporate duties towards employees, society and the environment (Zuva & Zuva, 2018).

2.2.4 AGILE METHODS IN LIGHT OF CORPORATE GOVERNANCE THEORIES

To gain an initial understanding of the tensions between corporate governance and agility, it is necessary to examine how the theories that have shaped governance can be applied to Agile projects. Concepts such as agency theory and stewardship theory offer valuable perspectives for understanding where governance and Agile approaches align or come into conflict.

Agency theory, as a foundational theory of corporate governance, explains the use of control mechanisms by assuming that principals and agents may pursue different interests, making oversight necessary to align behaviour (Jensen & Meckling, 1976). In corporate settings, this often translates into formal reporting structures and hierarchical decision-making. Applied to Agile projects, however, its fit is limited, as many Agile practices rely on trust, self-organisation and intrinsic motivation (Beck et al., 2001).

By contrast, stewardship theory assumes that employees are collectively oriented and intrinsically motivated (Davis et al., 1997). This perspective aligns closely with Agile values, which emphasise mutual trust, shared goals and empowerment (Beck et al., 2001). From this

viewpoint, governance control mechanisms serve less to monitor behaviour than to facilitate communication, collaboration and alignment.

Taken together, these perspectives suggest that formal corporate governance is typically grounded in agency theory, whereas Agile approaches more closely reflect a stewardship orientation. However, scaled Agile frameworks reveal a mixture of theoretical assumptions. In frameworks such as SAFe, the introduction of additional governance roles and structures creates a form of theoretical convergence, bringing the principles of corporate governance and Agile delivery closer together (Turetken et al., 2017).

2.2.5 AGILE GOVERNANCE

The field of Agile governance emerged in response to the need for organisations to balance oversight with agility. While governance traditionally emphasises control and accountability, and agility emphasises flexibility and experimentation, research increasingly treats the two as complementary rather than contradictory (Luna et al., 2014b). With the growing adoption of Agile methods (Dybå & Dingsøyr, 2008), the need to rethink governance in dynamic and collaborative software development contexts became increasingly apparent. From 2006 onwards, the concept of Agile governance began to take shape through the emergence of specific terminology (Luna et al., 2014b). Since then, several authors have highlighted the lack of Agile, domain-independent governance approaches capable of supporting organisations in achieving their business objectives (Luna et al., 2010; Qumer & Henderson-Sellers, 2008).

2.2.5.1 Foundations and evolution of Agile governance

To address this disconnected and scarcely applicable conceptual foundation, Luna et al. (2014b) identified 167 relevant studies across the fields of software development, manufacturing, government and business management. In response to the absence of a coherent model or framework, Luna et al. (2014a) argued for the development of an ontology for Agile governance. Their synthesis of the literature later led Luna et al. (2016) to propose six meta-principles for Agile governance: appropriate governance, business orientation, people-centredness, quick wins, a systematic and adaptive approach, and simple design and continuous refinement.

These principles emphasise that governance must be appropriate to the specific organisational setting, balancing oversight and flexibility without adding unnecessary complexity, while still meeting regulatory and market demands. Governance is also business-oriented, ensuring that decisions at all levels are guided by and aligned with the organisation's

strategic objectives. People are placed at the centre and recognised as the primary drivers of change, with governance designed to motivate and support them. Early successes, or quick wins, are regarded as essential for generating momentum. Governance in this context is characterised as systematic yet adaptive, treating change as a natural feature of the business environment. Solutions are therefore delivered pragmatically in their most feasible form and iteratively improved over time (Luna et al., 2014a).

Together, these six meta-principles outline an Agile and context-sensitive approach to governance that differs from traditional governance settings. They advocate a lean form of governance that adapts flexibly to organisational context and business needs. However, as the term meta-principles implies, they operate at a high level of abstraction (Luna et al., 2016).

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Table 2: Overview of Agile governance meta values (Luna et al., 2016)

Inspired by the Agile Manifesto, Luna et al. (2016) combined the meta values and introduced principles into an Agile governance manifesto, intended to provide a framework to lead teams and organisations towards business agility.

2.2.5.2 Towards an Agile governance theory

In parallel to their work on the Agile governance manifesto, Luna et al. (2014a) saw the need for a conceptual framework. They noted the absence of a theoretical model in the existing literature that assists individuals and enterprises in analysing and describing Agile governance. To close this gap, they proposed the Agile governance theory aiming for developing a better understanding of how agility can establish effective and responsive governance in companies (Luna et al., 2015).

Luna et al.'s (2015) theory centres on theoretical constructs, starting with value delivery through Agile capabilities, governance capabilities, and business operations, shaped by

environmental and moderator factors. In the context of this study, the theory conceptualises governance on organisational level but offers limited insight into how governance operates within individual projects. Later, in 2020, Luna et al. (2020) acknowledge that their theory needs to be practically tested and developed 16 hypotheses, as shown in Table 3.

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Table 3: Agile governance hypotheses (Luna et al., 2020)

In 2023, Luna and Marinho (2023) conducted a survey with 118 participants, mainly comprising active practitioners and researchers. Their study found support for five hypotheses, pointing towards a close link between Agile capabilities, governance capabilities and business operations (Luna & Marinho, 2023), as illustrated in Figure 5.

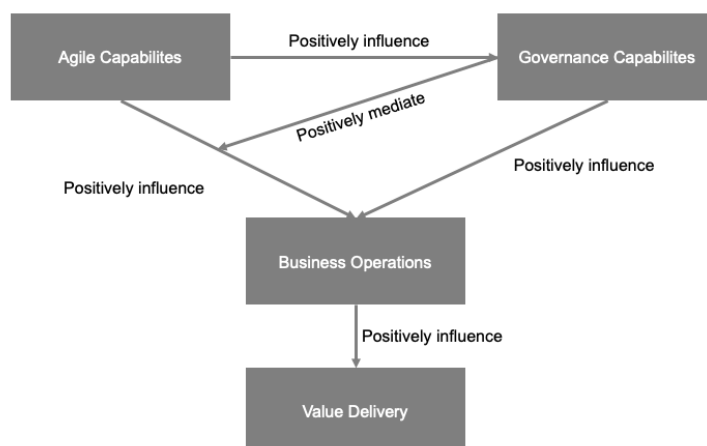


Figure 5: Agile governance theory mapping, author's own based on Luna and Marinho (2023)

The figure also illustrates that the confirmed hypotheses relate mainly to internal governance factors. This contrasts with traditional governance research, which examines both internal mechanisms and external influences, such as regulatory requirements, as outlined in Section 2.2.3. In Luna and Marinho's (2023) study, however, the external factors shaping Agile governance were not empirically validated.

Overall, despite extensive review in the field of Agile governance, no clear connection to the governance of Agile projects could be established. Establishing such a link requires substantial interpretation and reveals conceptual limitations in applying these constructs directly to Agile project governance. Although Luna and Marinho (2023) concluded that their findings support Agile governance theory as a framework for Agile governance implementation, they also acknowledged that further research is needed into its practical application. For the present study, Agile governance therefore offers a useful theoretical lens despite its conceptual limitations and the limited empirical insight available. However, it is treated as a distinct frame rather than as a direct explanation of how governance operates in Agile projects.

2.3 PROJECT GOVERNANCE

After examining the layers of project management and corporate governance, this literature review turns to its final layer: project governance. The section first explores the history and definition of project governance through existing models and frameworks. It then analyses governance in Agile projects in greater depth, with particular attention to governance practices and roles, the interfaces with corporate governance, and the distinctions between traditional and Agile project settings.

2.3.1 CONCEPTUAL FOUNDATIONS OF PROJECT GOVERNANCE

Turner and Keegan (1999) were among the first to publish work on the governance of project-based organisations and to bring the concepts of governance and projects together. Since then, project governance has been presented in various ways, with multiple meanings and interpretations emerging from different perspectives (Alvarez-Dionisi & Turner, 2012).

Alvarez-Dionisi and Turner (2012) provide an overview of definitions that reflects the multifaceted nature of the field. Project governance is often framed as a subset of corporate governance, ensuring the alignment of projects, programmes and portfolios with

organisational goals and strategies (APM, 2004; Müller, 2009; PMI, 2021). It is also commonly understood as a mechanism of steering and control that clarifies decision-making responsibilities and strengthens accountability at executive and board levels (Blakeegg et al., 2008; Müller, 2009; Renz, 2007).

The diverse definitions result from studies on different types of organisations and industries, leading to broad definitions that often overlap and interconnect various functions without clear distinctions (Too & Weaver, 2014). This diversity of definitions in theory can also be observed among practitioners. McGrath and Whitty (2020) surveyed project managers to evaluate their understanding of governance, revealing a diverse range of responses, including terms such as oversight, structure, gates, and quality.

Analogous to the numerous definitions of project governance in the literature, scholars and institutions have also proposed different models to simplify its representation, as summarised by Alvarez-Dionisi and Turner (2012). These models reveal both commonalities and differences. Turner (2009) and OGC (2011) emphasise the definition of governance structures and roles, ensuring accountability and alignment between projects and organisational benefits. ISACA (2000), OGC (2011) and Renz (2007) place greater emphasis on monitoring, risk management and control mechanisms, highlighting the importance of business value and assurance. Renz (2007) and Müller (2009), by contrast, adopt broader perspectives that integrate stakeholder participation, integrity and accountability.

These models share the view that project governance must establish clear structures for steering, control and accountability, while remaining embedded within wider organisational frameworks. Their main differences lie in their focus. For example, Müller (2009) emphasises theory-driven integration, whereas OGC (2011) focuses more strongly on the practical application of project management frameworks.

In conclusion, project governance provides the framework within which project activities are carried out. It connects governance principles at higher organisational levels with their practical application in projects (Too & Weaver, 2014; Winch, 2001). Effective project governance ensures that an appropriate organisational structure is established and formally documented, with clearly defined roles and responsibilities for oversight, sponsorship, alignment with organisational goals and the management of day-to-day operations to achieve intended outcomes (Marnewick & Labuschagne, 2011; Müller, 2009).

However, project governance is described either as the governance of project management systems at the organisational level or as the governance of an individual project (Alvarez-Dionisi & Turner, 2012). This ambiguity is accepted in the present study, as both the governance of the project itself and the governance of project management structures are relevant to understanding Agile software projects in digital transformation contexts. While the primary focus is on the governance of individual projects, it is also recognised that organisational project management shapes the wider context in which governance is applied.

2.3.2 PROJECT GOVERNANCE PARADIGM

To understand project governance, it is also necessary to examine the underlying paradigms that operate within organisations and shape how projects are structured, governed and evaluated. This builds on the theoretical orientations discussed in Section 2.2.2. For example, shareholder theory focuses on maximising financial returns and evaluates governance in terms of monetary outcomes and management efficiency. Stakeholder theory, by contrast, seeks to balance diverse interests and evaluates projects not only by financial results but also by their social and ethical impacts (Müller, 2009; Young, 2021).

This distinction can be illustrated through two project governance paradigms. The Flexible Economist Paradigm focuses on maximising return on investment (ROI) for shareholders by establishing project management as a core organisational competence, supported by project management offices (PMOs). In contrast, the Agile Pragmatist Paradigm seeks to balance diverse stakeholder needs by prioritising user requirements and enhancing the overall value of project outcomes over time through tailored project management methods (Müller, 2009; Young, 2021).

In examining the connections between project governance and Agile projects, the Agile Pragmatist Paradigm is particularly relevant. Young (2021) expands on this paradigm, noting that Müller's (2009) interpretation presents a relatively narrow view of Agile, centred on incremental delivery and iteration rather than the full set of Agile principles. Young (2021) further observes that little academic work has developed this paradigm, which points to a research gap in governance frameworks suited to Agile contexts.

2.3.3 INTERNAL AND EXTERNAL VIEWS ON PROJECT GOVERNANCE

As with the discussion of governance in Section 2.2.3, the literature on project governance reflects both structural aspects and the distinction between internal and external perspectives.

Similarly, Ahola et al. (2014) identify two distinct research streams in project governance: internal and external project governance perspectives.

The internal perspective examines project governance from the perspective of internal coordination and is closely related to project management, as reflected in the work of Renz (2007). It focuses on safeguarding, coordinating and adapting the interactions among participants in the temporary project organisation to ensure that they work towards shared project goals (Ahola et al., 2014).

The external perspective views governance as the system by which a project is directed, controlled and held accountable, as noted by Turner (2009). This view ensures that project outcomes align with organisational strategy and that applicable standards and rules are followed in practice (Martinsuo & Geraldi, 2020; McGrath & Whitty, 2015). From this perspective, project governance is related to the project as an embedded part of its wider environment, which moderates project success (Joslin & Müller, 2016).

2.3.3.1 Project governance dimensions

Kujala et al. (2021) offer an internal perspective on project governance by describing how governance operates within a project through six interdependent dimensions. These dimensions describe the areas in which project governance takes place. At its foundation, goal-setting establishes the bridge between business requirements on the one hand and the technical and organisational capabilities needed to deliver operational objectives on the other. This strategic alignment is reinforced through the incentives dimension, which structures reward and risk-sharing arrangements to ensure that team and stakeholder motivations remain aligned with project goals (Kujala et al., 2021).

Performance visibility is maintained through the monitoring dimension, which provides the tools and mechanisms needed to evaluate progress and identify deviations. This directly informs the coordination dimension, in which decision-making strategies are developed to guide future actions and facilitate alignment among the parties involved (Kujala et al., 2021).

The effectiveness of both monitoring and coordination depends on the roles and decision-making dimension, which ensures that individuals with appropriate authority and responsibility are positioned to act on insights and move the project forward. Underpinning all these dimensions is capability building, which focuses on identifying essential competencies and developing them systematically through learning from current project execution and past

experience. Together, these dimensions outline how governance functions internally and how it can contribute within the specific context of a project (Kujala et al., 2021).

2.3.3.2 *Project governance layers*

Turner (2009) adopts an external perspective and identifies three distinct levels of governance within organisations: the board level, contextual level and individual project level. At the board level, the focus is on major project investments, the establishment of project objectives, the allocation of resources and the implementation of controls to ensure that these objectives are achieved. The contextual level involves aligning project infrastructure with corporate strategy and ensuring that the organisation has the capability to execute projects effectively. The individual project level is concerned with defining governance structures and roles within specific projects, including setting goals, determining the means of achieving them and monitoring progress.

This multi-level approach provides a comprehensive view of how governance influences both the strategic and operational aspects of project management (Alvarez-Dionisi & Turner, 2012). Too and Weaver (2014) developed a framework based on Müller's (2009) external governance perspective. This framework is grounded in the OECD's (2004) definition of corporate governance as the relationships and structures through which organisational objectives are set, pursued and monitored.

Building on Müller's (2009) work, Too and Weaver (2014) expand the theoretical foundation by including structures, governance elements and their interdependencies, as well as the connections between different governance layers.



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copyright reasons.*

Figure 6: Governance structures (Too & Weaver, 2014)

Project governance cannot be adequately explained by examining structures, levels and processes alone. Attention must also be paid to the broader organisational environment, as governance is embedded within a specific context that influences its form and effectiveness (Song et al., 2022). Martinsuo and Geraldi (2020) emphasise that governance mechanisms are strongly shaped by their social, organisational and political environments. In addition, research suggests that governance should also be understood through the everyday practices and interactions that shape how structures operate. From this perspective, governance emerges as a dynamic process influenced by the actions of those involved, rather than being determined solely by formal design (Vaara & Whittington, 2012; van Marrewijk et al., 2016).

2.3.4 PROJECT GOVERNANCE ELEMENTS AND ROLES

To better understand governance through the interactions highlighted in the literature, four elements within a governance system need to be considered: portfolio management, steering boards, programmes and PMOs. Müller (2009) introduced these elements, and Too and Weaver (2014) integrated them into a multi-level governance framework. Project governance that incorporates these elements can significantly enhance project performance within organisations (Too & Weaver, 2014).

2.3.4.1 Portfolio management

In a governance context, portfolio management determines which projects should be maintained, initiated or cancelled. Through this selective process, portfolio management supports organisational governance by ensuring that selected projects align with the

organisation's strategic objectives. It also provides mechanisms for balancing the demands of current operations with long-term strategic goals by reallocating resources and terminating projects where necessary (Klakegg et al., 2008; Müller, 2009).

2.3.4.2 Steering Board

Project success depends on clearly defined objectives and alignment between the organisation's expectations and the methods used to achieve them. The project sponsor plays an essential role as the link between executives and project managers, enabling strategic decisions to be implemented effectively within the project portfolio. Where the responsibilities of governance and oversight exceed what a single project sponsor can reasonably provide, a steering board may be established to assume this role (Müller, 2009).

Steering boards, also referred to as steering committees, represent one of the principal mechanisms of project governance, particularly in complex organisational contexts. This body is accountable for directing, overseeing and establishing constraints for the management of projects, programmes or portfolios. Steering boards function as extensions of, or representatives for, project owners, assuming a decisive role in securing alignment between the temporary project organisation and the permanent structures of the organisation. They are described as temporary groups of senior executives tasked with joint project ownership, thereby embedding governance authority at a high organisational level. This ensures that projects are adequately resourced and governed with the oversight needed to mitigate risks, address compliance obligations and safeguard the strategic interests of the owner (AXELOS, 2017; Müller, 2009).

Membership frequently includes representatives of funding bodies, key resource providers and users. This enables steering committees to negotiate competing stakeholder interests, ensure continued access to critical resources and maintain awareness of broader organisational interests. Research highlights the value of members who are willing to engage actively, challenge assumptions, promote open dialogue and manage conflicts of interest transparently (Karlsen, 2020; Müller, 2009).

2.3.4.3 Programmes and projects

According to Too and Weaver (2014), projects and programmes are integral components of the governance system because they are critical to achieving an organisation's strategic and tactical objectives. Key factors in a governance system include the creation of an appropriate project and programme structure, the assurance of deliverable quality, and the implementation

of systems that monitor viability, control risks and address stakeholder requirements (Marnewick & Labuschagne, 2011; Müller, 2009).

A programme is commonly defined as more than a single large project. In the project management tradition, it is described as a group of related projects managed in a coordinated way to achieve a common objective (PMI, 2021). This perspective highlights the coordination of multiple projects to manage complexity, align resources and realise benefits that would otherwise be unattainable. In this view, programme management involves more than scaling up project management practices. It requires balancing alignment with shifting strategies, managing interdependencies and ensuring that projects collectively deliver value to the organisation (Müller, 2009; Pellegrinelli et al., 2007).

Projects are temporary organisations established to deliver defined outputs within constraints of time, cost and scope, whereas programmes are more open-ended and involve emergent goals. Projects deliver outputs, while programmes ensure that these outputs combine to create strategic value (Pellegrinelli et al., 2007; PMI, 2021).

2.3.4.4 Project management offices

PMOs are widely recognised as formal organisational entities established to provide a consistent governance framework for projects. The Project Management Institute defines a PMO as a management structure that standardises project-related governance processes and facilitates the coordinated use of resources, tools, methodologies and techniques across projects (PMI, 2021).

As Aubry et al. (2010) point out, considerable variability exists in how PMOs are configured across different organisational settings. This diversity is shaped by a range of factors, including industry characteristics, organisational maturity, the composition of project portfolios and internal governance arrangements. In some organisations, PMOs are embedded in hierarchical control structures with clearly defined mandates. In others, they primarily offer guidance and support to projects (Aubry & Simard, 2023) or enhance efficiency through the centralisation of project support and control. Their responsibilities range from providing project management support to directly managing projects. In doing so, the PMO ensures that accurate and relevant information is available to senior management, thereby maintaining visibility and control over project performance (Müller, 2009; Too & Weaver, 2014).

Müller et al. (2013) show that PMOs typically engage in partnering, serving and controlling roles in governance settings, although the relative emphasis placed on each role varies by

context. In many organisations, PMOs primarily act as control instruments responsible for enforcing project standards, tracking compliance and ensuring efficiency. This controlling function is closely aligned with traditional views of governance, which stress order, predictability and risk containment. Despite growing interest in more adaptive governance arrangements, many organisations continue to rely on PMOs as mechanisms for safeguarding process integrity and standardisation in order to enhance reliability and compliance (Aubry & Simard, 2023; Müller et al., 2013).

In summary, the structural project governance elements discussed in this section are portfolio management, steering boards, programmes and PMOs (Müller, 2009; PMI, 2021; Too & Weaver, 2014). The literature provides a clear description of their formal mandates in traditional, plan-driven environments. However, it does not yet adequately explain how these governance roles function when projects follow Agile principles. PMOs, for example, are often conceptualised as control instruments (Müller et al., 2013), while Aubry et al. (2010) note considerable variability that has not yet been systematically connected to Agile projects. The question of which roles actually emerge, and how they interact, in Agile digital transformation projects therefore remains empirically open. This establishes the need for Research Question 1, which asks what governance roles are experienced in Agile digital transformation projects.

2.3.5 PROJECT GOVERNANCE AS A STRATEGIC LINK

Based on the project governance layers introduced in Figure 6, their interrelationship points to a link between corporate strategy and the project level. Projects are increasingly recognised as critical vehicles for implementing organisational strategy and generating business value (Shenhar & Dvir, 2007). In this context, the role of project governance is to safeguard alignment and ensure that strategic intent is consistently translated into project outcomes (Musawir et al., 2017; PMI, 2021).

The translation of strategy into projects occurs progressively across governance levels. Broad strategic objectives are first articulated at the portfolio level and then broken down into programme objectives or project-level goals. Maintaining this link throughout the process is a central challenge, as the scope of activities narrows while complexity increases (Musawir, 2023).

This linking activity can be viewed from both internal and external perspectives. In the literature, a distinction is made between project governance and the governance of projects, as shown in Figure 7 (Müller et al., 2014). As introduced earlier, project governance in this

research refers to the governance of individual projects and adopts a narrower perspective, providing direction and support to ensure that projects are delivered successfully and in accordance with their business cases. Governance of projects, by contrast, operates at the portfolio and programme level and assumes a broader perspective, focusing on the selection of appropriate projects in line with strategic priorities and on ensuring long-term value creation through benefits realisation (Morris, 1997; Müller et al., 2014).

Programmes serve as a bridge between the strategic direction provided at the portfolio level and operational execution at the project level. For standalone projects outside a programme structure, project governance becomes the intermediary between organisational strategy and project execution. In both cases, governance mechanisms ensure that projects contribute to strategic objectives. The strategic link therefore depends on the interface between project governance and project management (Musawir, 2023).

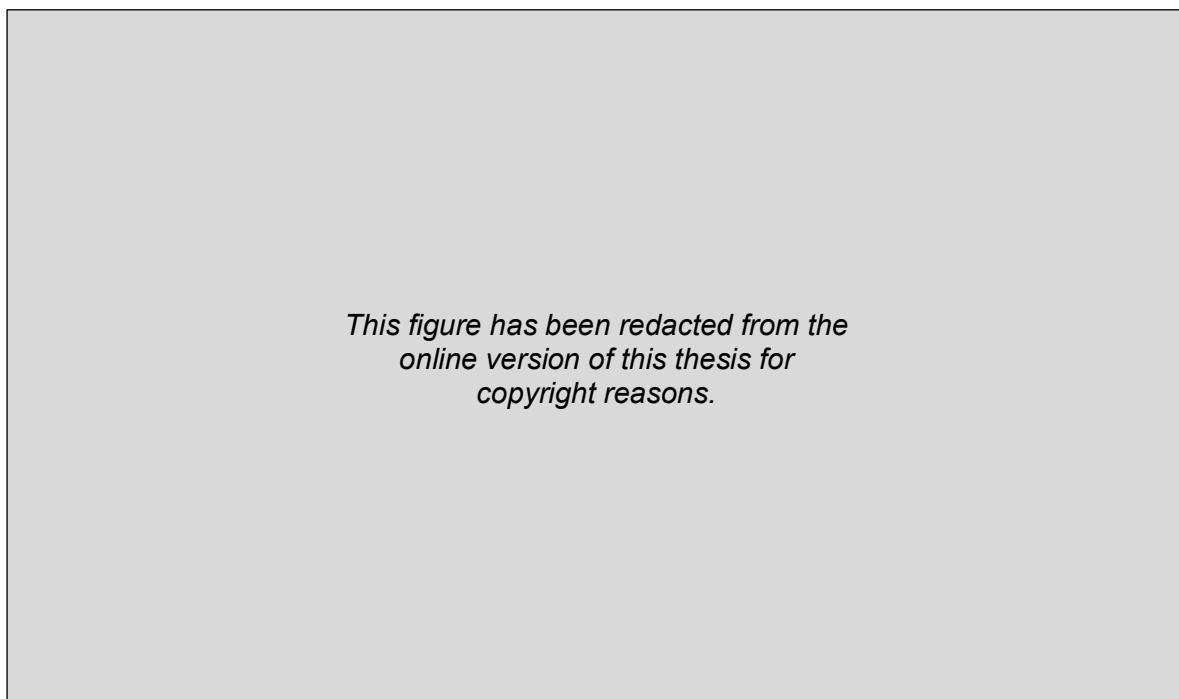


Figure 7: Governance system as interface (Musawir, 2023).

Key mechanisms of project governance include project sponsorship, which provides a single point of accountability for the strategic success of the project, and stage-gate reviews, which serve as formal checkpoints for reassessing whether a project continues to align with strategic priorities (Cooper, 1990; Garland, 2009). In this way, project governance enables downward

communication from higher levels to guide project objectives and upward communication from the project level to explain how value will be achieved and delivered (Musawir, 2023).

2.3.6 GOVERNANCE FOR AGILE PROJECTS

Previous research on governance in Agile projects and organisations has primarily focused on assessing the maturity of agility or the transition to Agile methods within organisations. These studies have often approached governance from an organisational or functional perspective, such as IT governance, and offer limited empirical evidence (Lappi et al., 2018). The following section therefore adopts a generic approach to describing governance in Agile projects, focusing on the practices applied.

2.3.6.1 Categorisation of Agile project governance practices

Research on project governance has traditionally concentrated on projects that adopt standard project delivery methods and on organisations that rely heavily on established planning and control measures (Sanderson, 2012; Turner, 2006). While these traditional governance practices have historically met the needs of projects and organisations, Agile principles have notably questioned the need for formal governance by proposing transformative shifts at the project level (Taborda, 2019).

This change has led researchers to investigate how traditional project governance practices can be adapted to Agile methods. Building on Kujala et al. (2021), who outlined key dimensions of project governance, Lappi et al. (2018) used this work as the foundation for developing a framework of practices for the governance of Agile projects. Their literature review aimed to provide insight into the mechanisms of project governance within the context of Agile projects. To achieve this, they selected papers that discussed Agile projects in practice in relation to governance dimensions and mechanisms.

By integrating Kujala et al.'s (2021) work, Lappi et al. (2018) conceptualise and categorise project governance practices applied in Agile projects according to governance dimensions. To enhance the comparability of these contributions, this study presents a comparative overview in Table 4.

Dimension	Outline of the project governance dimensions from 2016 according to Kujala et al. (2021)	Adaptation of project governance dimensions for Agile projects governance practices (Lappi et al., 2018)
Goal Setting	Integrating business or other requirements with technical and organisational capabilities within the project's operational framework and objectives.	Agile projects emphasise close cooperation between customers and empowered teams, using a product vision and flexible mechanisms such as product backlog to guide prioritisation and iteration processes. Project goals evolve during the project lifecycle rather than being fixed upfront (Augustine et al., 2005; Strode et al., 2012).
Incentives	Ensuring the alignment of the project team and stakeholders' reward and risk-sharing arrangements with the project's aims.	The nature and philosophy of Agile work itself serve as the primary incentives for team commitment, focusing on peer recognition and decision-making authority. The role of monetary incentives is limited, and risk management tends to follow traditional methods (Bjarnason et al., 2012; Conboy & Morgan, 2011).
Monitoring	Comprising effective tools and mechanisms for evaluating the project's performance.	Agile projects commonly use sprint/iteration reviews for monitoring, emphasising deliverable validation and customer feedback. Both qualitative and quantitative measures are used, and visual tools like burn-down charts support progress tracking (Chow & Cao, 2008; Conforto et al., 2014b).
Coordination	Addressing the strategies that guide the project's forthcoming actions and facilitate decision-sharing among involved entities.	Agile coordination practices include real-time, informal communication, iterative planning using backlogs, and continuous prioritisation. Customer involvement and team autonomy are critical, with a focus on visual rather than formal documentation (Augustine et al., 2005; Conforto et al., 2014b).
Roles and Decision-Making	Placing the right individuals in appropriate roles, equipped with suitable responsibilities and authority to support the project's progress towards its goals.	Agile teams are cross-functional and autonomous, with decision-making shared among team members. Adaptive leadership by the project manager and the role of Agile coaches or scrum masters are highlighted (Augustine et al., 2005; Conboy & Morgan, 2011).
Capability Building	Identifying and developing the competencies needed for projects, further developing them through insights gained from current and previous project undertakings.	Building capabilities within Agile projects involves continuous learning and knowledge exchange. The optimal composition of Agile teams balances high- and low-skilled workers, and knowledge sharing within and across teams is emphasised (Batra, 2009; McAvoy & Butler, 2007).

Table 4: Project governance practices comparison

Kujala et al.'s (2021) study also aimed to deepen understanding of project governance. Building on this literature, Lappi et al. (2018) compared traditional and Agile project governance practices to determine which practices apply to Agile projects, which require modification and which new practices have emerged. Their analysis also highlighted areas of project governance that remain insufficiently understood and require further research.

Many traditional governance practices, such as formal compliance and assurance mechanisms, can be applied to Agile projects. For example, contracts and budgeting are present in both traditional and Agile contexts, although Agile projects may use more flexible approaches, such as time-and-materials contracts and continuous budgeting. While traditional

projects often adopt a longer post-project perspective when evaluating long-term benefits, Agile projects tend to focus on short-term metrics and deliverables validated through customer acceptance (Drury-Grogan, 2014; Heikkilä et al., 2015; Lappi et al., 2018).

Practices that are typically fixed at the start of a project, such as scope and goal-setting, need to be modified for Agile projects. In Agile environments, these elements are revisited continuously throughout the project lifecycle. In addition, traditional project plans, which serve as the main coordination and management tools, are replaced in Agile projects by flexible tools such as product backlogs and vision boards, which provide real-time updates and information (Drury-Grogan, 2014; Heikkilä et al., 2015; Lappi et al., 2018).

Emerging Agile-specific governance practices include the direct integration of customers into the project team, often through product owner roles, to facilitate decision-making and validation. Agile projects also emphasise the formation of empowered and versatile teams that share responsibilities typically assigned to individual roles in traditional projects. These teams engage in continuous learning and knowledge sharing through practices such as sprint retrospectives (Lappi et al., 2018; Moe et al., 2010).

Despite the adaptability of many traditional practices to Agile contexts, gaps remain between Agile project governance and traditional project governance. For instance, Agile projects often adopt a short-term perspective on project outcomes and success, which can weaken strategic alignment with the parent organisation's long-term goals. In addition, the management of external stakeholders, such as auditors and regulatory bodies, is less emphasised in Agile projects than in traditional projects (Lappi et al., 2018; Persson et al., 2012).

Agile project governance practices are implemented within the project itself. Practices that enable project teams to have the freedom, authority and capability to generate value for and with the customer are most effectively applied in Agile projects. By contrast, strategic and structured governance practices that connect to higher organisational levels pose challenges for Agile projects. In summary, practices in Agile projects aim to ensure the continuous delivery of working software, but may overlook the strategic governance connections with the broader organisation (Lappi et al., 2018).

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Table 5: Overview of Agile project governance practices (Lappi et al., 2018)

The literature on governance practices examined in this section has begun to operationalise traditional and Agile governance practices through Lappi et al.'s (2018) extension of Kujala et al.'s (2021) governance dimensions into Agile settings, and through Luna et al.'s (2014a, 2023) meta-principles of Agile governance as a separate field. However, three gaps remain. First, Lappi et al. (2018) point out that these practices are implemented within project boundaries and that no connection has yet been made to the structural perspective, such as that proposed by Too and Weaver (2014). The relationship between Agile practices, the governance system and governance actors therefore remains unresolved. Second, Luna and Marinho (2023) operate at a high level of abstraction and highlight the limited practical validation of Agile governance theory. Third, researchers have explicitly called for more empirical work on how governance models are integrated in practice (Luna et al., 2023; Nyandongo & Khanyile, 2019). Which governance practices are actually applied in Agile digital transformation projects, by whom and under which organisational conditions therefore remains empirically open. This informs the empirical examination of Research Question 2, which investigates which governance practices are applied in Agile digital transformation projects.

2.3.7 EVALUATION CRITERIA FOR PROJECT GOVERNANCE

In the literature, there is a lack of consensus on the definition of project governance (Ahola et al., 2014; Musawir et al., 2017). Consequently, there is no widespread agreement on what constitutes effective project governance or how it should be evaluated (Garland, 2009; Young,

2021). Empirical evidence, however, demonstrates that effective project governance is essential for reducing costs, improving quality and enhancing the business effectiveness of projects (Joslin & Müller, 2016; Lechler & Dvir, 2010; Müller, 2009; Young, 2021).

It is further recognised that a project governance structure with clearly defined roles and decision-making authority contributes to alignment between project objectives and organisational strategy (Too et al., 2017). To explain what constitutes effective governance, Too et al. (2017) provide the overview shown in Figure 8. However, this overview does not fully align with the scope of the present study, as aspects such as “ensuring accountability” are too broad to support an empirical investigation of project governance within this research.



Figure 8: Functions of effective project governance (Too et al., 2017)

Kujala et al. (2021) take a different approach and offer a structured perspective on project governance with a clearer connection to practical application, as shown in Figure 9 (Kujala et al., 2021). These dimensions have already been used to organise Agile governance practices in Section 2.3.6.1, and were introduced in Section 2.3.3.1. Kujala et al. (2021) applied the dimensions by linking them to mechanisms that characterise effective project governance. These mechanisms were derived from empirical interviews and project observations.



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Figure 9: Project governance dimensions (Kujala et al., 2021)

At the same time, Kujala et al. (2021) point out that effective project governance depends on the extent to which these dimensions and mechanisms are fulfilled, while also remaining context-dependent. This requires a research design that examines both project governance and the context in which it is embedded.

2.4 CONCLUSION

The review of Agile project management covers the shift from plan-driven to adaptive approaches. Grounded in the Agile Manifesto (Beck et al., 2001), Agile methods prioritise individuals and interactions, working software, customer collaboration and responsiveness to change over comprehensive documentation and rigid planning. Frameworks such as Scrum operationalise these values, while scaled frameworks such as SAFe extend Agile principles to large, multi-team environments (Leffingwell, 2011). This illustrates that the conceptual distinction between Waterfall and Agile approaches rests not only on iterative delivery but also on different assumptions regarding predictability, control and the nature of value creation (Boehm, 2002; Kisielnicki & Misiak, 2017).

As the adoption of Agile methods increases, the understanding of project success also changes, which is central to this study. The traditional project success model, which primarily focuses on cost, time and quality, has been deemed insufficient for Agile projects (Ciric Lalic et al., 2022). Building on the work of Shenhar and Dvir (2007), Ciric Lalic et al. (2022) conceptualise project success as a multidimensional phenomenon. This perspective becomes

more detailed by considering project efficiency, business success and preparation for the future as relevant factors, while also reflecting the impact on the team, client and customer.

Corporate governance is widely understood as the system by which companies are directed and controlled, with a strong emphasis on aligning the interests of stakeholders (Cadbury Report, 1992; OECD, 2004). This system includes both internal mechanisms, such as boards of directors, and external influences, including regulatory frameworks (Weir et al., 2002; Zuva & Zuva, 2018). Corporate governance has therefore been shaped by multiple perspectives, particularly agency theory, which emphasises formal control mechanisms to align divergent interests, and stewardship theory, which assumes trust-based relationships (Davis et al., 1997).

Within this framework, project governance has emerged as a mechanism for organisational control, translating corporate governance principles into structures and processes that ensure project alignment with strategic objectives (Müller, 2009; PMI, 2021; Turner, 2009). Various scholars and institutions have proposed models to conceptualise project governance, highlighting its complexity and multidimensional nature. Among these, ISACA (2000), Müller (2009), OGC (2011) and Turner (2009) provide diverse perspectives. These range from internal organisational mechanisms to external regulatory considerations and stress the importance of goal alignment, accountability and informed decision-making (Alvarez-Dionisi & Turner, 2012; Too & Weaver, 2014).

The literature on project governance has predominantly focused on projects that follow traditional approaches and on organisations that rely on formalised planning and control mechanisms (Sanderson, 2012; Turner, 2006). Yet with the growing adoption of Agile approaches, the applicability of these traditional governance models has increasingly been questioned (Cervone, 2011; Taborda & Mohammed, 2021).

To explore the governance of Agile projects in German companies, it is essential to incorporate the specific characteristics of Agile projects, the governance practices and roles found in traditional governance, and the contextual factors that shape governance. Taken together, the fields reviewed demonstrate that governance in Agile project environments is shaped by three interacting layers: the specific characteristics of Agile projects and project success, the governance practices and roles found in traditional governance, and the contextual factors of governance, as shown in Figure 10.

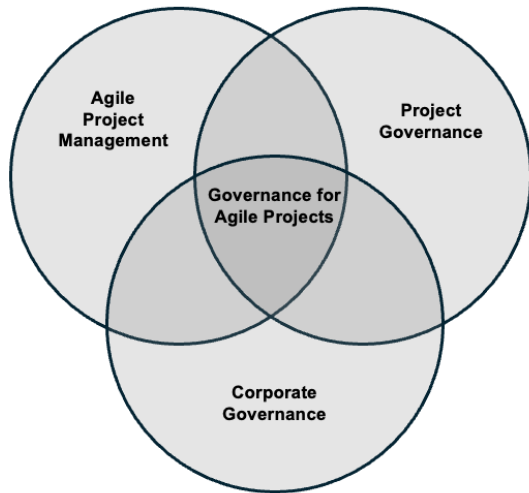


Figure 10: Intersection of the research fields (author's own)

While each field offers important insights, no approach could be identified that provides an integrated view of how governance operates within Agile projects or how governance roles and practices interact with project context in practice. Although there are attempts to develop cross-disciplinary theories, these remain subject to clear limitations.

First, Lappi et al. (2018) draw on the foundational dimensions of Kujala et al. (2021). Based on dimensions such as goal-setting, monitoring and coordination, they propose governance practices that can be modified or reinterpreted for Agile settings. However, they do not fully explain how these practices are adapted in practice.

Second, this limitation is reflected in Luna et al.'s (2014b) work on Agile governance, which seeks to develop governance concepts that align with Agile values rather than adopting established governance structures. Traditional governance frameworks are predominantly rooted in agency theory, emphasising control mechanisms, hierarchical accountability and formal oversight (Jensen & Meckling, 1976). Like Agile approaches, Luna et al.'s work aligns more closely with stewardship assumptions. It proposes that governance should be appropriate to context, people-centred and continuously adaptive. However, their work operates at a high level of abstraction and has received limited empirical validation (Luna & Marinho, 2023). In addition, Luna et al.'s theory addresses governance at the organisational level, offering limited insight into how governance operates within individual Agile projects. This is precisely where tensions between control and autonomy are most pronounced.

Beyond these attempts, the fields remain characterised by tensions. The first tension concerns planning horizons. Agile methods prioritise short iterations, emergent requirements and the

continuous redefinition of value (Boehm, 2002; Kisielnicki & Misiak, 2017; Serrador & Pinto, 2015), whereas governance and traditional project governance rely on long-term strategic alignment and clearly defined benefits realisation cycles (Musawir, 2023).

The second tension concerns accountability when decisions previously taken by governance bodies are delegated to delivery teams. Corporate governance structures assign responsibility to sponsors, steering boards or senior management (AXELOS, 2017; Müller, 2009). Agile approaches, by contrast, distribute decision-making authority to self-organising teams and emphasise collective responsibility (Lappi et al., 2018; Sutherland & Schwaber, 2013).

The third tension concerns governance structures. Governance elements such as portfolio management, steering boards, PMOs and programme structures form integrated governance systems in traditional settings (Too & Weaver, 2014). These roles are not directly considered in Agile frameworks such as Scrum (Sutherland & Schwaber, 2013).

In conclusion, while project management literature has developed distinct approaches for Waterfall and Agile methods, the governance discourse has not followed this development to the same extent. This reflects a practical challenge for organisations seeking to govern Agile projects within corporate structures designed around traditional governance assumptions. The absence of integrated frameworks is evident not only in the academic literature but also in professional practice.

The Project Management Institute's governance guide (PMI, 2021) makes no reference to Agile methods, while consultancy approaches address isolated aspects rather than offering integrated solutions. Organisations therefore often govern Agile projects through highly customised and local adaptations, but with limited theoretical or empirical guidance. Exploring governance from the perspective of those involved in Agile projects may therefore offer valuable insights into how governance is adapted in practice.

Each of the three fields examined contributes conceptual clarity in its own area, but none adequately addresses how the fields intersect. The Agile project literature in Section 2.1 establishes methodological principles and a multidimensional view of success in Agile and digital transformation settings. The governance literature in Section 2.2 defines organisational and corporate-level steering and clarifies the surrounding system for project governance, but engages with Agile principles only in the separate research stream of Agile governance. The project governance literature in Section 2.3 develops detailed insights into roles, structures and practices, but remains predominantly related to traditional, plan-driven project settings.

Agile extensions in this field, such as those proposed by Lappi et al. (2018), lack empirical grounding and integration with traditional governance structures.

From this fragmented view of the fields, three specific gaps emerge that directly motivate the research questions of this study: how governance roles are experienced in Agile settings (RQ1), which governance practices are actually applied (RQ2), and how these roles and practices influence the achievement of digital transformation (RQ3). The next section develops these related gaps in greater depth.

2.5 RESEARCH GAPS

The literature review has established that governance in Agile projects operates at the intersection of three fields: Agile projects, governance and project governance, as shown in Figure 10. While these fields reveal conceptual tensions, the research gaps emerge across three interrelated dimensions. These concern the application of Agile project governance in practice, the roles, structures and practices through which governance is applied, and the influence governance has on the achievement of digital transformation. Although several conceptual models exist in the field, they remain largely isolated, and there is a lack of empirically grounded understanding of how Agile projects are governed in digital transformation projects in practice.

Project governance is recognised as a critical success factor in project management, with empirical evidence showing that it contributes significantly to improved outcomes (Joslin & Müller, 2016; Lechler & Dvir, 2010; Müller, 2009; Young, 2021). The gaps must therefore be considered primarily from the perspective of those responsible for managing Agile projects.

First, the literature provides conceptual frameworks for Agile project governance (Kujala et al., 2021; Lappi et al., 2018; Luna et al., 2014a). However, empirical studies examining how project governance for Agile projects works in practice remain scarce (Nyandongo & Khanyile, 2019), or operate at a high level of abstraction and have received limited empirical validation, as in the case of Agile governance theory (Luna & Marinho, 2023). Recent studies indicate that this gap persists, as organisations continue to experience tensions when aligning Agile delivery with traditional governance structures (Henriquez et al., 2025; Nyandongo, 2024). Scholars have therefore called for more empirical studies examining how governance models can be integrated in practice (Luna et al., 2023; Nyandongo & Khanyile, 2019). What remains insufficiently understood is not only what governance structures or practices should look like in Agile settings, but also how governance is adapted in practice. This particularly concerns

the organisational context, which shapes Agile project governance practices and reveals further gaps (Lappi et al., 2018). These gaps become more prominent when governance is viewed not as a static system, but as something shaped by interpersonal dynamics (van Marrewijk et al., 2016) and through interaction with Agile projects under real conditions.

Second, governance roles and responsibilities in Agile settings are particularly under-researched, despite their relevance for project success (Lechler & Dvir, 2010). In traditional project contexts, portfolios, programmes, steering boards and PMOs serve as essential linkages between corporate governance and project delivery (Müller, 2009; Too & Weaver, 2014). However, the adaptation of roles within Agile project governance systems remains unclear (Lappi et al., 2018). While Lappi et al. (2018) provide a model of practices adapted from traditional governance, empirical validation remains limited regarding which practices are applied in real-world projects, how they are implemented and with what effects. The absence of systematic research on governance roles in Agile contexts creates uncertainty for organisations seeking to establish effective governance, particularly when adopting a dynamic perspective and assuming that roles and practices evolve over time.

Third, the relationship between governance and project success in Agile contexts has not been thoroughly explored. Attempts to classify effective project governance in theory have been based on the dimensions proposed by Kujala et al. (2021), yet these dimensions are restricted to traditional project contexts, as the authors themselves state. In addition, project success is defined as a multidimensional construct that goes beyond scope, time and cost (Ahimbisibwe et al., 2015; Ciric Lalic et al., 2022; Shenhar & Dvir, 2007). In digital transformation projects, success is increasingly assessed by the extent to which the intended transformation, innovation and integration outcomes are realised (Chang & Chen, 2025).

This lack of guidance is reflected not only in academic research but also in professional practice. The Project Management Institute's governance guide (PMI, 2021) makes no reference to Agile methods. Similarly, consulting firms address isolated aspects, such as risk management through the three lines of defence model (Deloitte, 2019), maturity assessments adapted to Agile contexts (PwC, 2017) and strategic alignment through regular outcome reviews (BCG, 2024), rather than providing integrated solutions for governing Agile projects.

Existing literature therefore offers limited insight into governance in Agile projects and lacks an integrated perspective across the relevant research fields. A global survey found that 36% of organisations had no governance framework in place for Agile projects, while 7% perceived existing frameworks as obstructive (Nyandongo & Khanyile, 2019). These gaps are

particularly significant given the challenges in the German context, where organisations operate within bureaucratic structures shaped by uncertainty avoidance and formalisation (Brodbeck & Frese, 2008; Hofstede, 2001), and where 62% of companies identify internal processes as primary governance-related barriers (Komus, 2020). Taken together, these insights establish the conceptual foundation for examining governance roles (RQ1), governance practices (RQ2), and their influence on the achievement of digital transformation (RQ3).

3 RESEARCH METHODOLOGY

The previous chapter reviewed the relevant literature on Agile project governance and identified limited empirical insight into how organisations apply governance in Agile projects. Building on the gaps identified in Section 2.5, this chapter outlines the methodological approach used to examine governance roles (RQ1), governance practices (RQ2), and their influence on the achievement of digital transformation (RQ3), as experienced by project management practitioners in their work.

This chapter sets out the methodological approach adopted to address these research gaps. To ensure conceptual coherence across the research design, the study follows the structure proposed by Saunders et al. (2019). Their layered model of the research process aligns philosophical assumptions, methodological choices and empirical procedures. This chapter adopts their terminology and logic to structure the following sections.

The chapter first presents the philosophical positioning and research approach, followed by the rationale for using narrative inquiry. The study is grounded in a constructivist philosophy and follows an inductive approach to theory building. Narrative inquiry was selected as an appropriate research strategy for understanding the individual experiences of project management professionals involved in Agile digital transformations. A narrative analysis framework is used to examine governance roles, governance practices and their influence on project success. The chapter then details the implementation of the study, including ethical considerations, participant recruitment, data collection and data analysis procedures. It concludes with a reflection on the quality and rigour of the research process.

3.1 RESEARCH PHILOSOPHY

Research philosophies describe beliefs and assumptions about how knowledge develops. A clear philosophical understanding helps to clarify the research design and supports the process of answering the research questions (Easterby-Smith et al., 2018; Saunders et al., 2019).

Although philosophical ideas often remain implicit in research (Slife & Williams, 1995), they influence research practices and should therefore be stated explicitly (Saunders et al., 2019). Following Creswell and Creswell (2018), researchers can articulate the philosophical worldview underpinning their study and explain how it has influenced their approach to research. Creswell and Creswell (2018) define worldviews as general philosophical

orientations that researchers bring to their studies, shaped by their disciplinary backgrounds and previous research experiences (Creswell & Creswell, 2018; Guba, 1990).

Researchers need to understand their philosophical orientation because it enhances reflexivity in relation to research methods and supports effective research design by clarifying what evidence is needed, how it should be collected and how it should be interpreted (Easterby-Smith et al., 2018). In this study, the terms 'paradigm' and 'philosophy' are used interchangeably, following Saunders et al. (2019). In the remainder of the chapter, the term 'philosophy' is used.

3.1.1 POSITIVISM

Positivists believe that there is a single reality that can be measured and known. They assume that the researcher can remain independent and objective, focusing only on information that can be directly observed and measured (Easterby-Smith et al., 2018; Saunders et al., 2019). Positivists create knowledge by forming hypotheses that are tested for validity and justified through measurable correlations and comparisons. Their approaches are therefore characterised by strict methodologies and quantitative methods (Creswell & Creswell, 2018; Crotty, 1998).

In the context of this research, a positivist researcher would concentrate on observable and measurable aspects, such as statistical analysis to evaluate the impact of different governance structures and hierarchical models on project success rates. A positivist study might also use surveys to measure the effectiveness of specific decision-making frameworks or their correlation with project outcomes.

A positivist approach aims to keep the researcher detached from the research and the data in order to avoid influencing the results. However, positivism has been criticised for being too rigid, making it less suitable for studying human intentions and thoughts, understanding processes and meanings, or developing theory (Easterby-Smith et al., 2018; Saunders et al., 2019).

3.1.2 INTERPRETIVISM

Interpretivism is a philosophical perspective that emphasises subjectivity and recognises that humans create meanings. Scholars adopting this perspective seek to gain insight into organisational realities by examining these meanings. Interpretivists focus on exploring

individuals' lived experiences and incorporate both participants' perspectives and their own interpretations during the research process (Saunders et al., 2019).

Interpretivists believe in multiple realities and view reality as relative, depending on context and meaning (Neuman, 2000). They use flexible research approaches to capture meaning in human interactions (Carson et al., 2001) and prefer a collaborative approach with participants. This allows them to adapt to new insights and social realities throughout the study (Hudson & Ozanne, 1988).

Interpretivism is suitable for in-depth cultural or ethical studies (Saunders et al., 2019). In the context of this research, it offers the opportunity to investigate project governance by focusing particularly on human and cultural elements. However, this study does not only seek to understand how practitioners experience governance. It also explores what governance roles exist, what practices are applied, and how these influence digital transformation. This goes beyond interpretation and requires a philosophy that supports the generation of new patterns and conceptual insights from the data.

3.1.3 *CRITICAL REALISM*

Critical realism engages with questions about the nature of reality and how it can be known (Sayer, 2000). Critical realists differentiate between a real world and an observable world. Reality exists independently of human perception, but knowledge of it is shaped by observable perspectives and experiences (Collier, 1994).

Critical realist research aims to explain observable organisational events by identifying the underlying causes and mechanisms through which deep social structures influence daily organisational life (Saunders et al., 2019). Research following a critical realist approach therefore seeks to develop deep explanations and understanding (Mingers, 2004; Zachariadis et al., 2013).

Knowledge is generated by interpreting the causal structures of observable events within specific conditions (Fleetwood, 2005). In the context of this research, a critical realist approach would combine structural aspects of project governance with external factors. However, because the methodological implications of critical realism are not always clearly defined, it can be difficult to derive concrete methodological procedures and apply them practically within the context of this research (Easterby-Smith et al., 2018), particularly when seeking to capture the dynamics of Agile projects.

3.1.4 CONSTRUCTIVISM AND RATIONALE

Constructivism posits that reality is not objectively given. Instead, individuals construct reality through their interactions with their social and organisational environments (Creswell & Creswell, 2018). Meaning is therefore shaped by cultural, historical and situational factors (Crotty, 1998). This philosophy emphasises the importance of understanding how individuals interpret experience and clarifies the role of the researcher in engaging with participants to co-construct knowledge (Creswell & Creswell, 2018).

Constructivist researchers focus on how people perceive and interpret a particular issue by using broad questions. This approach enables participants to articulate what a situation means within their specific context. Creswell and Creswell (2018) describe the researcher's task as making sense of these personal interpretations of the world. In this research, the focus is on how project management professionals experience the governance of Agile projects in which they have been involved.

A constructivist philosophy fits the study's focus on Agile project governance because governance is not treated as a fixed construct. The study assumes that governance practices and roles vary across organisations and reflect relationships and organisational cultures (Brunet, 2019; Cicmil & Hodgson, 2006). This philosophy aligns with the exploratory research aim, which seeks to understand how governance is practised in Agile projects. This understanding is shaped by the actions and practices of those involved, rather than by generic models or frameworks, thereby contributing to a more integrated understanding of project governance for both academics and practitioners (Song et al., 2022).

In conclusion, from an ontological perspective, this research assumes that multiple realities exist and that these are socially constructed through context-specific interpretations (Guba & Lincoln, 1994). Epistemologically, knowledge is considered valid when it emerges from dialogue and shared reflection between the researcher and participants (Crotty, 1998). Reflexivity is essential in this philosophy because researchers cannot separate themselves from the research process (Lincoln & Guba, 1985). In this study, the researcher's professional experience as a project management practitioner therefore shapes the interpretation of the data and contributes to the generation of context-rich insights. Building on this foundation, a separate decision on research approach is not required, as constructivist research is inherently inductive (Creswell & Creswell, 2018; Lincoln & Guba, 1985).

3.2 RESEARCH STRATEGY

The philosophical foundation of constructivism forms the basis for selecting the research strategy. Project context, organisational setting and governance systems play a central role in inductive research. This makes qualitative methods, such as interviews and case studies, more appropriate than large-scale surveys or quantitative models. Inductive researchers typically work with smaller, more focused samples, allowing in-depth exploration of diverse perspectives on a given phenomenon (Saunders et al., 2019).

When selecting an appropriate research strategy, the qualitative nature of the study, the use of diverse data sources, contextual relevance, flexibility and inductive logic are all important. These features support a deep understanding of the phenomenon and highlight the practical relevance and applicability of the research findings. These criteria are met by case study, Grounded Theory, phenomenology and narrative inquiry, which are introduced in this section (Saunders et al., 2019).

3.2.1 CASE STUDY

A case study is an in-depth investigation of a topic or phenomenon within its real-life context (Yin, 2018). The “case” in case study research can refer to a wide variety of subjects, including individuals, groups or organisations. Once the case is defined, the research aims to understand the dynamics of the topic within its specific setting or context (Eisenhardt, 1989). Case study research allows for a deep understanding of phenomena, particularly when the boundaries between the phenomenon and its context are unclear (Yin, 2018).

Case study research is a valuable approach when dealing with complex topics and when contextual factors play a decisive role in the research question (Dul & Hak, 2008). In the context of this research, a case study could provide a detailed examination of how organisations understand and implement governance in Agile projects by analysing data from interviews, observations and documents. While deep insights can be gained from a single case study, these insights are closely tied to the specific context of the individual case. Given that this research aims to develop a comprehensive understanding of the governance of Agile projects across different organisational contexts, the limited generalisability of a single case study presents a notable disadvantage. A multiple-case study, which could be used to replicate findings (Yin, 2018), is not feasible because of time constraints. It would also require detailed access to information sources such as confidential project documentation, which cannot be guaranteed.

3.2.2 *GROUNDING THEORY*

Grounded theory is a qualitative research strategy focused on developing theories grounded in data. It involves systematic data collection and analysis through iterative processes (Charmaz, 2014; Strauss & Corbin, 1998) and aims to construct theory from collected data in a structured manner (Mills et al., 2006).

Grounded theory is particularly suitable for research areas requiring deep insight into social interactions and processes. Its flexibility makes it appropriate for fields where understanding complex behaviours is important (Bryant & Charmaz, 2007). Grounded theory's emphasis on deriving theory directly from data ensures that findings are closely tied to real-world experiences and contexts (Glaser & Strauss, 1967). However, this research considers Grounded Theory less suitable because theory development is not the primary objective.

3.2.3 *PHENOMENOLOGY*

Phenomenology is a qualitative research strategy that explores lived experience and the meanings individuals assign to a specific phenomenon. Its roots lie in interpretive and constructivist traditions. Phenomenology seeks to understand how experiences are perceived and made meaningful by individuals, rather than explaining them through causal relationships or predefined categories (Husserl, 1970). It aims to identify the essential structures of experience as participants live them (van Manen, 1990), which makes phenomenology suitable for research that seeks to capture the fundamental nature of an experience across individuals (Creswell & Poth, 2018).

Phenomenology therefore places strong emphasis on individual perceptions, feelings and subjective meaning-making. For this research, such a focus is not sufficient. The study aims to understand governance in Agile projects, with particular emphasis on roles, practices and their influence on project success. This requires an approach that allows governance arrangements to be examined as evolving and context-dependent processes over time. Phenomenology centres on the subjective meaning of experiences rather than their development over time or their surrounding context. It therefore does not sufficiently support the research objectives or address the research questions of this study.

3.2.4 *NARRATIVE INQUIRY AND RATIONALE*

Over recent decades, researchers have increasingly adopted narrative approaches to understanding human experience. While narrative traditions have long existed within narratology, it was in the 1990s that scholars began formally developing narrative inquiry as a distinct research methodology (Clandinin & Caine, 2013; Clandinin & Connelly, 2000).

Narrative inquiry serves both as a perspective on human experience and as a methodological framework for studying experience narratively. This enables in-depth exploration of individuals' lived experiences over time and within their specific contexts (Clandinin & Caine, 2013; Clandinin & Connelly, 2000). A defining feature of narrative inquiry is its emphasis on experience as central to both the researcher and the research process. Engagement with participants supports the co-construction of knowledge and reinforces the relational nature of inquiry (Clandinin & Connelly, 2000; Connelly & Clandinin, 1990).

In narrative inquiry, the participant serves as the narrator, while the researcher acts as a facilitator of the storytelling process. Participants lead the storytelling through their experiences, while the researcher contributes through attentive presence and responsive questioning (Clandinin & Connelly, 2000). Narratives can range from brief accounts of specific events to extended stories about work projects or organisational changes, and even complete career histories (Chase, 2011; Saunders et al., 2019).

Narrative research assumes that reality is, at least in part, shaped by individuals' interpretations of the world around them. Consequently, collected stories are treated as constructed accounts that embed assumptions and interpretations (Riessman, 1993). A key methodological principle of narrative inquiry is the preservation of chronological connections as recounted by participants, which enhances both understanding and analysis (Saunders et al., 2019).

Narrative inquiry is based on the belief that human experiences become accessible through stories. It allowed the researcher to begin with participants' experiences and to refine the analytical focus iteratively as the narrative journey progressed (Clandinin & Connelly, 2000).

Narrative inquiry was selected as the research strategy because the research questions focus on how project governance is applied in practice. They focus on the human dimension of governance, particularly how project management experts perceive governance arrangements. Governance practices, for example, must be adapted to the specific project context, meaning that project governance is context-dependent (Kujala et al., 2021). Project governance is also embedded in organisational conditions that shape its form and

effectiveness (Song et al., 2022). Furthermore, research emphasises that governance should be understood through the practices and interactions that shape how structures operate. From this perspective, governance emerges as a dynamic process influenced by the actions of those involved, rather than being determined by formal design (van Marrewijk et al., 2016).

These aspects cannot be fully captured through research strategies that focus primarily on predefined variables, structural characteristics or isolated practices. Narrative inquiry allows participants to present governance as they perceived and experienced it within their project environments. This includes structural and procedural elements, as well as interpersonal conflicts and the influence of organisational context. Narrative inquiry therefore provides the depth required to understand how governance develops in Agile projects across their lifecycle and how project management experts experience these dynamics in real-world conditions. The alternative research strategies presented earlier are not as well suited to capturing these contextual and evolving aspects.

Narrative inquiry also addresses limitations associated with the case study strategy. While case studies can offer in-depth and context-specific insights, their findings remain strongly tied to a single organisational setting, which limits their transferability across different environments. Grounded Theory requires researchers to approach the field with minimal theoretical preconceptions. Phenomenology focuses primarily on subjective perceptions and lived experience, which does not sufficiently support the analysis of governance roles, practices and their influence within Agile projects as required by the research objectives.

Beyond the choice of research strategy, narrative inquiry must also be distinguished from interview-based approaches that share its qualitative orientation. It is important to distinguish narrative inquiry from semi-structured or unstructured interviews, which share a qualitative orientation but differ in research stance and analytical operation. Semi-structured interviews are organised around a researcher-defined topic guide that directs attention to pre-identified themes (Saunders et al., 2019). Unstructured interviews, by contrast, typically treat participants as informants providing data on a specified topic. Narrative inquiry, in the tradition of Clandinin and Connelly (2000), operates on different premises.

Narrative inquiry is a relational rather than extractive form of inquiry. Knowledge is co-constructed between the researcher and participant, rather than retrieved from the participant as an information source (Clandinin, 2016; Connelly & Clandinin, 1990). The unit of analysis is lived experience itself, rather than isolated information about a specific topic. The researcher attends to how participants make sense of their experiences over time, including the temporal,

social and contextual dimensions in which these experiences unfold (Clandinin & Connelly, 2000).

The analytical process includes restorying as a methodologically essential step (Ollerenshaw & Creswell, 2002; Polkinghorne, 1995), through which participants' experiences are reconstructed as coherent narratives before being subjected to cross-case analysis. A three-dimensional inquiry space of temporality, sociality and place (Clandinin & Caine, 2013; Clandinin & Connelly, 2000) provides a structural framework specific to narrative inquiry, which is examined in more detail in Section 3.4.4. For the purposes of this study, these features were not stylistic preferences but methodological requirements. Project governance is experienced through extended interactions, evolves across project phases and depends on contextual conditions inherent to the organisation and its governance system.

This narrative approach allowed governance to emerge as participants themselves experienced it, without prematurely segmenting relevant aspects. This is consistent with the established tradition of narrative inquiry in organisational research (Boje, 2001; Czarniawska, 2004).

3.3 DATA COLLECTION AND GENERATION

Data collection was understood as data generation, acknowledging the active co-creation of narratives between the researcher and the participating project management professionals (Clandinin, 2016). This section describes how participants were recruited, outlines the participant sample, explains the interview approach and addresses the ethical considerations that guided data collection.

3.3.1 SETTING AND RECRUITMENT

Participant selection plays an important role in qualitative research design (Dahal et al., 2024). Narrative inquiry typically involves a small number of research participants (Dahal et al., 2024; Riessman, 1993), sometimes even a single individual in the context of life history research (Saunders et al., 2019). For in-depth interviews aiming to generate rich and detailed accounts, a sample size of six to ten participants is generally sufficient to meet the objectives of a study (Dahal et al., 2024). For the chosen narrative inquiry design, it is essential to engage participants with substantial first-hand experience in the field (Clandinin & Connelly, 2000).

This is also consistent with Patton's (2015) principle of purposeful sampling, which focuses on selecting information-rich cases and notes that qualitative inquiry typically studies relatively small samples in depth. The appropriateness of the sample size in this study was further assessed using the concept of information power. Malterud et al. (2016) conclude that the more information a sample contains that is relevant to the study, the fewer participants are required.

A sample's information power depends on the aim of the study, sample specificity, use of established theory, quality of dialogue and analysis strategy (Malterud et al., 2016). The aim of this study is narrowly defined, focusing specifically on Agile project governance in digital transformation projects in Germany. The German context provides analytically relevant conditions for examining tensions between Agile projects and governance systems. As outlined in Section 1.1, German organisations operate within formalised structures shaped by high uncertainty avoidance (Brodbeck & Frese, 2008; Hofstede, 2001), with internal processes and top management identified as primary challenges for Agile projects (Komus, 2020), alongside stagnating innovation performance (BDI, 2025) and difficulties in managing transformation (Bitkom, 2025). This combination of formalised conditions, documented difficulties in digital transformation and widespread Agile adoption makes Germany an information-rich setting.

Ideal participants were experienced project management professionals with at least five years of experience in Agile digital transformation projects in Germany. This study is also theoretically informed by established governance literature, as discussed in Chapter 2. The narrative interviews supported in-depth dialogue and were complemented by member checking. The analysis follows an in-depth narrative approach, involving detailed narrative restories followed by case-specific thematic coding. The 11 participants from German project settings are therefore considered information-rich cases providing sufficient information power for answering the research questions.

Digital transformation projects are closely linked to software development, as Agile methods originated in this context and are primarily applied in this domain (Beck et al., 2001; Conforto et al., 2014b). Participants could hold permanent positions or work as external specialists, such as freelancers or consultants. Eligible candidates were required to have participated in at least three Agile software-based projects across two different industries. In addition, they had to be familiar with project governance practices and Agile frameworks such as Scrum or SAFe and hold at least one relevant certification. This experience and knowledge were essential for the study, as participants needed to be able to describe how governance roles

emerged and evolved, how different actors were connected, and how governance contributed to or hindered project progress. Whether through direct involvement or close observation, participants needed to provide detailed, first-hand accounts of how governance was enacted and how it influenced the achievement of digital transformation.

Potential participants were identified via LinkedIn based on public information, focusing on first- and second-degree connections. Keyword combinations identified around 200 potential candidates. If the initial outreach had not yielded sufficient participants, the researcher was prepared to access professionals via PMI Germany. This initially supported the assumption that recruiting ten suitable participants was realistic and was considered the minimum sample size for this research. Connection type did not influence participant selection. All candidates were assessed exclusively against the defined inclusion criteria.

The recruitment strategy aimed first to reach the minimum target of ten participants. If needed, further candidates would have been recruited iteratively until thematic saturation was reached. The initial outreach yielded 12 candidates who agreed to participate, making additional recruitment unnecessary. One candidate withdrew before the interview, resulting in a final sample of 11 participants.

In addition, the researcher had to ensure that participants clearly understood the research purpose, which was communicated in the initial recruitment email and reinforced throughout the recruitment process. The intention was to create an environment in which participants felt comfortable sharing their experiences openly.

No gatekeeper approval was required, as the study focuses on participants' professional experiences across multiple projects rather than on any specific organisation or project context. Participants were not acting as representatives of their connected organisations, such as employers or clients. Measures were put in place to ensure that no identifiable, confidential or proprietary information about any organisation was disclosed or published.

The study design received ethics approval from the University of Worcester.

3.3.2 *ETHICAL CONSIDERATIONS*

As narrative inquiry is inherently relational, ethical considerations go beyond institutional requirements such as anonymity. The research design focuses on relational ethics, ensuring care for participants and respect for their stories (Clandinin & Connelly, 2000; Josselson,

2007). Given the diverse roles of participants, specific attention was paid to confidentiality and the ethical representation of their experiences.

To protect confidentiality regarding sensitive internal decisions, strict anonymisation measures were implemented. Participants were informed that the interview was exploratory rather than evaluative, in order to reduce pressure to present themselves overly positively. They had the right to withdraw at any stage and to review their transcripts.

Participants are not identifiable in the thesis. Only the researcher knew their identities, and unique identification codes were used across all files. Third-party names mentioned during interviews were removed or generalised during transcription. Participants were reminded not to share sensitive data and were able to skip questions or stop the recording at any time to protect themselves.

Data collection was conducted via Microsoft Teams using a private meeting room. Informed consent was requested via email. To ensure security, consent forms and name-code lists were stored separately from interview data. Without the secured name-code file, it is not reasonably possible to trace statements back to individual participants.

Finally, the study required reflexivity. As the researcher has a professional background in project management, this prior experience may influence the interpretation of narratives (Josselson, 2007). The researcher therefore engaged in ongoing reflection on personal assumptions and made these transparent within the thesis to support ethical integrity.

3.3.3 PARTICIPANT OVERVIEW

Based on the recruitment strategy described in Section 3.3.1, 11 interviews were conducted, exceeding the minimum target of ten. The participants were experienced professionals according to the inclusion criteria. They represented a diverse range of roles, including project managers, transformation leads and consultants, and brought expertise from industries such as telecommunications, financial services and automotive, as presented in the overview below. This breadth of backgrounds helped ensure that the narratives reflected multiple perspectives.

ID	Profile	Industry expertise range	Professional experience in years	Selected project	Narrative account	Main narration in min.	Engagement points
P1	Former Head of Governance Processes, University lecturer, Freelance Project Manager	Industrial manufacturing, Automotive	> 10	Whistleblower System	Lean governance and regulatory pressure	65	2
P2	Former Technology Consulting Partner, Head of Project Delivery in TMT	Telecommunication, financial services	> 30	Trading platform	Incremental delivery prior to Agile frameworks	60	2
P3	Withdrawal						
P4	Consulting Manager and Project Lead	Automotive, Energy	> 5	Collaboration platform	Agile practices within a rigid contract setting	90	2
P5	Project Manager Global ERP Transformation	Aerospace, automotive, financial services	> 20	SAP rollout	Global steering meets local adaptation	70	2
P6	Head of Competence Centre and Agile Transformation Lead	Business services, energy, financial services	> 15	Global Product Platform	Reshaping Scaled Agile	75	2
P7	Finance IT Transformation Lead	Telecommunication	> 10	Finance Transformation	From Greenfield to top-down governance	60	2
P8	Global Sales Transformation Lead	Technology, business services	> 15	Sales 2.0	People-centred governance	65	3
P9	Agile Project Manager, Organisational Development Lead	Business services, financial services	> 10	Digital Product Delivery	Addressing addition bias	70	3
P10	Project Manager Global ERP Transformation	Telecommunication, financial services	> 5	New Technology Stack	Governance and vendor influence	75	2
P11	Managing Director Project Management Consulting boutique	Telecommunication, business services	> 10	Data warehouse Integration	Governance tensions and a protective layer	70	2
P12	Consulting Partner and Project Practice Lead	Energy, business services, industrial manufacturing	> 25	Global HR Transformation	Navigating process standardisation and fear	65	2

Table 6: Participant overview

The participants showed diverse career paths. Some described themselves as method specialists who had remained loyal to a particular framework throughout their careers, refining it over time and applying it with conviction. Others had evolved from classic project managers into divisional heads or had completed coaching qualifications to place the human dimension more centrally in their work. There were also pragmatic professionals who, after many years

in delivery, relied on intuition and practical judgement to decide what worked. This diversity gave each interview its own dynamic. Beyond scheduling and other organisational matters, substantive engagement with participants typically consisted of the narrative interview and the subsequent member checking of the transcript and restory.

3.3.4 INTERVIEW FRAMEWORK AND QUESTIONS

In narrative inquiry, the research setting is understood as a relational space that emerges through the interaction between researcher and participants. Participants led the conversations by selecting Agile projects and narrating their governance experiences. In this relational space, the researcher followed participants' experiences, trusting that meaning emerges not from control but from attentively accompanying their journeys (Clandinin & Caine, 2013; Clandinin & Connelly, 2000). In the context of this study, the interviews followed four phases that enabled a balance between narrative openness and analytical focus. The procedure draws on the narrative interview methodology developed by Schütze (1977) and elaborated by Jovchelovitch and Bauer (2000) through four interconnected stages, as shown in Table 7.

The narrative interview was structured into four distinct phases: initiation, main narration, questioning and final discussion. Specific procedural guidelines were proposed for each phase and are outlined in more detail below. These guidelines were not intended to be followed rigidly but served as guidance to support the interviewer in avoiding a conventional question-and-answer dynamic (Jovchelovitch & Bauer, 2000).

The first phase, the initiation phase, served to establish rapport and provide context for the conversation. The interviewer began with a short professional introduction and an outline of the study's purpose. Participants were informed that the conversation was designed as a professional dialogue rather than a classical interview, and that their perspective as project management experts was central to the research. This phase aimed to create a professional and trusting atmosphere. The participant was then invited to speak about their motivation for working in Agile environments, their general experience with Agile projects and their typical project approach. Questions such as "How do you usually organise a project in your context?" were used to support this opening. Importantly, the participant was asked whether they had a concrete project in mind that could serve as an example throughout the rest of the conversation, and the audio recording began at this stage (Jovchelovitch & Bauer, 2000).

The second phase focused on enabling free storytelling. This narration phase enabled the participant to share one selected project in detail, from beginning to end. In line with narrative methodological principles, the interviewer did not interrupt or direct the narration during this phase. The goal was to gain insight into the participant's experience of the project while the researcher listened attentively (Jovchelovitch & Bauer, 2000).

After the narrative was complete, a follow-up phase was used to revisit key aspects of the story in light of the study's research questions. The follow-up phase aimed to deepen understanding of the context, roles, governance structures, applied practices and perceived success of the project. This phase retained a conversational tone but shifted from open narration towards analytical depth (Jovchelovitch & Bauer, 2000).

The final phase of the interview provided an opportunity for reflection and closure. Participants were invited to share governance recommendations based on their experiences. In addition, the remaining time was used to outline the next steps of the study and to close the conversation formally. The audio recording was stopped at this point, and immediately afterwards the researcher prepared a brief memory protocol to capture impressions, contextual elements and analytical reflections.

To conduct the interviews in line with the outlined phases and to allow sufficient space for the main narration phase, a maximum duration of 90 minutes was scheduled. This created a conceptual tension that the researcher accepted. Clandinin and Connelly (2000) describe narrative inquiry as a process in which several conversations are held with participants over an extended period. The research design in this study deviates from that approach. This decision reflects the practical limitation of not having continuous access to experienced project management professionals over a longer period. To address this limitation, participants had the opportunity to review their transcripts and restories and to provide additional contextual information. Owing to his professional background, the researcher expected that the necessary depth of inquiry could also be achieved within the shorter time frame by focusing on a specific Agile project.

	1. Initiation Phase (10 min)	2. Main Narration (50 min)	3. Integrated Follow-up (20 min)	4. Concluding Talk (10 min)
Goal	Build rapport, set context, invite narration Introduce researcher (professional background) and motivation for the research Introduce interview frame	Enable free storytelling of a project	Gather detail on context, roles, practices and influence on goals (based on research questions)	Recommendations and finishing interview, explain next steps
Questions	Would you like to share a bit about your motivation working in Agile projects? What do you like and dislike working in Agile environments? What types of Agile projects have you worked on recently? How do you usually organise a project in your context? Where do you start? What types of Agile projects have you worked on recently and what was your role? Do you have one project in mind that would be suitable to share?	Please tell me about the project from start to finish as you experienced it.	How was the project embedded in terms of connected organisational parts? How novel or how uncertain and complex was the project technology? Context / <i>Moderating factors</i> How was the project success communicated based on formal feedback or documented outcomes (in terms of efficiency, team, customer, business readiness)? Context / Project success factors Which roles were responsible (e.g. for coordination and control) within the governance structures? How did these roles relate to each other and to your own role? RQ1 / <i>Roles</i> What practices (such as routines, tools, or decision-making mechanisms) were applied? RQ2 / <i>Practices</i> How did the applied practices contribute to or influence the achievement of the digital transformation? RQ3 / Influence on success	What would you recommend to organisations in terms of governing Agile projects?
Researcher notes	No interview framing, more a professional discourse Start recording, project artefacts (org.-charts) or other visual aids allowed (whiteboard, post-it notes)	No interruption (follow-up questions only after the end of the story), letting narration unfold Being open, explorative, curious, not data-extracting Allowing thematic direction to emerge naturally	Insert questions only after storytelling is complete	Stop recording, adding memory protocol immediately after

Table 7: Narrative interview phases

It is also important to acknowledge another methodological tension. Clandinin and Connelly (2000) do not conceptualise narrative inquiry as a structured interview method. The interview

phases were therefore understood as flexible guidance rather than a rigid protocol, and the researcher remained attentive to moments where departing from the structure was necessary in order to follow the participant's narrative account. The structure was developed to provide a practical framework that supported the researcher in maintaining narrative openness while ensuring that the research questions were addressed during the narration.

3.4 NARRATIVE INQUIRY AND NARRATIVE RESTORIES

Building on the data collected through narrative interviews, this section describes how the raw material was transformed into narrative restories. It explains how the field texts were documented, outlines the structure of each restory, provides the methodological rationale for using restories and introduces the narrative dimensions that guided the reconstruction process. The restories form the empirical foundation for the subsequent data analysis.

3.4.1 DOCUMENTING NARRATIVE INQUIRY

Due to the iterative nature of narrative inquiry, there is a continuous intersection between field texts, interim research texts and final research texts (Clandinin & Caine, 2013; Clandinin & Connelly, 2000).

As a starting point, the conversations with participants generated field texts, including interview transcripts, the researcher's notes and participant-produced materials such as project documentation. These artefacts served as key components of the analysis (Clandinin, 2016). Field texts are co-constructed data sources that reflect not only participants' narratives but also the relational dynamic between researcher and participant (Clandinin & Connelly, 2000). These texts may take multiple forms, including transcripts, field notes, researcher notes and other artefacts that contribute to a rich understanding of the Agile projects discussed.

In this study, the field texts contain participant and organisational background information. They also include initial descriptions of governance practices, transitions and experiences shared by participants in their own words. As the process continued, field texts evolved into interim research texts. This transformation was not linear but involved iterative and reflective engagement with the material, including evolving interpretations by the researcher (Clandinin, 2016). As the researcher became immersed in the field texts, narrative accounts began to take form (Clandinin & Caine, 2013; Clandinin & Connelly, 2000; Nasheeda et al., 2019).

Final research texts in narrative inquiry may include traditional academic formats such as journal articles, but may also include texts intended for non-academic audiences (Clandinin & Caine, 2013). In response to the research objectives, the final research texts in this study present restoried narratives of each participant's governance journey. These narratives integrate governance structures, governance practices and their influence on project success within individual contextual accounts. Subsequently, these narratives inform a cross-case thematic synthesis that highlights common patterns, tensions and learnings across cases.

3.4.2 NARRATIVE RESTORY STRUCTURE

The restories presented the Agile digital transformation projects examined in this study, reconstructed from the narrative interviews. They formed the empirical foundation for the subsequent narrative analysis. In this study, a restory was a condensed account of the collected narratives, designed to capture the essential elements needed to address the research questions. The narrative restories were designed to stand as self-contained accounts that reflected the unique perspective and professional journey of each participant.

Each restory followed a consistent structure and aimed to preserve the narrative character of the interviews while maintaining methodological clarity. The projects were presented as condensed case narratives that retained the experiences of project management practitioners and provided readers with direct access to their perspectives. The tone and metaphors used by participants were preserved to maintain the authenticity of their accounts.

Each restory began with an introduction to the interview partner, outlining their professional role and background. This contextualisation framed the subsequent narrative in relation to their expertise and perspective. A short description of the interview setting and atmosphere followed. The main section presented the project in chronological sequence, aligned with the narrative dimensions of the research framework. Each restory concluded with a reflective commentary that recorded the researcher's observations and pointed to initial, non-analytical connections with the research questions. These comments served as a bridge to the subsequent narrative analysis without yet moving into theoretical interpretation.

3.4.3 NARRATIVE RESTORIES AND RATIONALE

Scheffelaar et al. (2021) emphasise that narrative research constitutes a distinct form of qualitative inquiry in which participants interpret their own experiences by telling their individual stories in their own way. Narratives reveal how experiences are connected to a specific context

and to prior experiences, while providing a detailed view of experience within its social setting. Research representations must therefore preserve this narrative output to retain the meaning of participants' accounts. Removing the narrative form too early risks detaching experiences from their meaning and context (Clandinin & Connelly, 2000).

Restorying refers to the process in which collected narratives are analysed, recomposed and written into a coherent, often chronologically ordered narrative (Ollerenshaw & Creswell, 2002). A distinction is made between first-order narratives, which refer to the stories individuals tell about their own experiences, and second-order narratives, which are constructed by researchers to make sense of those experiences (Elliott, 2005; Scheffelaar et al., 2021). This research positions the restories as second-order narratives and uses them for narrative reconstruction. The restories transform transcripts and field notes into chronologically ordered accounts that aim to preserve participants' experiences. The analysis proceeded to the systematic identification of codes, subthemes and themes only after the researcher had developed an understanding of the individual stories (Clandinin & Connelly, 2000).

Polkinghorne (1995) distinguishes between two ways of working with narrative data. Narrative analysis involves synthesising events, statements or observations into a coherent story, while analysis of narratives examines existing stories to identify common themes across cases. In this study, both approaches were applied sequentially. The restories first reconstructed each participant's experience as a coherent narrative, before the analysis proceeded to the identification of codes, subthemes and themes across cases. Narrative restories were therefore methodologically important for supporting credibility. They allowed readers to view Agile projects as coherent wholes and to follow how the analysis developed from stories to codes, subthemes and final themes, thereby strengthening transparency.

In addition, restories contributed to making the researcher's interpretative lens visible, which was a methodological necessity within a constructivist philosophy. As a management consultant with extensive experience, the researcher brings specific assumptions that shape perception and interpretation. Making this position explicit supported rigour by enabling readers to situate the analysis critically and by acknowledging the researcher as part of the research field rather than as a neutral observer.

Clandinin and Connelly (2000) describe this as relational responsibility, recognising that knowledge is constructed between researcher and participant. They further illustrate that reflexive engagement with one's own position can lead to deeper analytical understanding.

The background and perspectives of the researcher were therefore part of the research process and were made explicit in this study.

Within the narrative restories, turning points played a central analytical role. Denzin (1989) describes these moments as key points that mark fundamental change and may remain hidden when analysis is reduced to isolated codes. In the context of this research, turning points are particularly relevant because they may indicate situations in which governance systems began to change and affect the project and participants. These moments can be more clearly recognised through narrative reconstruction into restories before they are further examined at the level of codes and themes. The restories are therefore not preliminary outputs but a methodologically essential component of this study.

3.4.4 NARRATIVE DIMENSIONS

To prevent the restorying process from becoming subjective storytelling, this study applied Clandinin and Connelly's (2000) three-dimensional narrative inquiry space, which consists of temporality, sociality and place. It is grounded in the understanding that experience cannot be understood in isolation (Clandinin & Caine, 2013).

Temporality in narrative inquiry is based on the premise that experience is shaped by what came before and carries implications for what follows. This dimension guided attention to how governance evolved over the project lifecycle, including key turning points and transitions between project phases (Clandinin & Caine, 2013; Clandinin & Connelly, 2000).

The sociality dimension requires attention to both personal and social conditions. The personal dimension focuses on participants' emotions, hopes and concerns, while the social dimension concerns the external factors and environmental forces shaping these experiences (Clandinin & Caine, 2013; Clandinin & Connelly, 2000). This supports an understanding of the interpersonal dynamics of actors within a governance system.

Place is also central, as the location in which experiences occur influences the meaning of narratives (Clandinin & Caine, 2013; Clandinin & Connelly, 2000). This dimension directed attention to the regulatory environment and to the direct organisational and strategic context that shaped governance.

Considering these dimensions ensures a context-sensitive analysis of governance in Agile environments. They ensure that each restory is reconstructed with attention to its progression,

dynamics and contextual embedding. All three narrative dimensions therefore deepen understanding of the conversation, allowing the researcher to recognise the underlying story more clearly.

3.5 DATA ANALYSIS

The narrative restories developed in Section 3.4 provide the foundation for the subsequent analysis. Their depth and contextual detail create the necessary grounding for cross-case coding, which builds on this understanding rather than explaining or repeating it. This foundation sets the stage for outlining the analytical approach used to interpret the narrative material.

There are various ways in which narrative data can be analysed. However, narrative analysis is not a single analytical technique or a clearly defined methodological framework (Saunders et al., 2019). Rather, it refers to a collection of approaches used to examine different aspects of narrative, with considerable variation in how they are applied in practice (Maitlis, 2012; Riessman, 2008).

Two common approaches within narrative analysis are thematic narrative analysis and structural narrative analysis (Maitlis, 2012; Riessman, 2008). Structural narrative analysis focuses on how a story is constructed, including language use and rhetoric, and explores how these elements shape meaning for the listener or audience. Thematic narrative analysis, by contrast, focuses on what the narrative is about. It seeks to identify analytical themes within the content of one or several narratives while still paying attention to sequence and context (Saunders et al., 2019). This study therefore follows a thematic approach, as the meaning derived from what is told in relation to the research questions and objectives is considered most relevant.

3.5.1 DATA ANALYSIS PROCESS

After the narrative restories were completed in full, as described in Section 3.4.1, they provided the foundation for a deep understanding of each story. This understanding of the narrative, together with the researcher's position, formed the basis for initiating the coding process. The data analysis followed an integrated approach that combined Braun and Clarke's (2006, 2012) six-phase thematic analysis with narrative inquiry methodology (Clandinin & Connelly, 2000), as shown in Table 8, which summarises the analytical process.

Phase (according to Braun & Clarke, 2006, 2012)	Focus	Individual case (interview)	Cross-case comparison (all interviews)	Outcome
1. Familiarising yourself with the data	Familiarisation through reading (restories, transcripts, and researcher notes)	Yes		Basis for understanding each individual interview (Braun & Clarke, 2006)
2. Generating initial codes	Initial (narrative) coding: meaningful segments, etc. (e.g. extensive project planning)	Yes		Narrative coding following Clandinin & Connelly (2000) and Saldaña (2016) first cycle coding, guided by the three-dimensional narrative inquiry space (Clandinin & Connelly, 2000)
3. Searching for themes	Identify patterns (supported by conceptual overview), building initial subthemes and themes	Yes	Yes	First cross-case meanings emerge and second cycle coding (Saldaña, 2016)
4. Reviewing themes	Systematically consolidate and review patterns	Yes	Yes	Combine codes and optimise theme structure
5. Defining and naming themes	Formulate content, boundaries, and names of themes	Yes	Yes	Final theme definition according to research questions
6. Producing the report	Write analysis report – quotations, interpretation, theoretical integration	Yes	Yes	Finalised theme texts ready for publication

Table 8: Narrative analysis process

The analytical process began with data familiarisation. Each transcript was read several times, and audio recordings were revisited where needed to refine contextual understanding. Early observations, notes and reflections supported engagement with the material in line with Braun and Clarke's (2006) first phase. Initial narrative coding was then carried out, guided by Clandinin and Connelly (2000). Codes focused on narrative elements such as people and roles, practices, processes and their dynamics. At this stage, the analysis remained at the individual case level and was connected to the three-dimensional narrative inquiry space of temporality, sociality and place (Clandinin & Caine, 2013).

These codes provided the basis for developing subthemes as early thematic clusters. Following Saldaña's (2016) two-cycle logic, the first cycle focused on narrative coding, while the second cycle applied pattern coding to organise individual concepts into coherent subthemes and themes.

Once preliminary themes and subthemes had been constructed, they were reviewed to assess their coherence and relevance. In line with Braun and Clarke (2006), this included checking internal consistency, identifying overlaps or fragmentation and refining boundaries. Subthemes that were not sufficiently supported by the data were reworked or removed.

After the review, each theme and subtheme was defined and named. This involved articulating the core meaning derived from the underlying codes and ensuring that each theme related directly to the research questions.

The final step produced the thematic narrative report. Themes and subthemes were integrated into a summary with descriptive detail and interpretative insight, as recommended by Braun and Clarke (2012). Selected quotations highlighted key points, and the analysis connected governance structures and practices across cases.

When integrating thematic analysis with the narrative inquiry of Clandinin and Connelly (2000), conceptual tensions had to be considered. Narrative inquiry relies on narrative streams that preserve the narrative character of participants' reports (Clandinin & Caine, 2013), whereas thematic analysis involves the systematic decomposition of data into codes and themes (Braun & Clarke, 2012).

The researcher recognised this tension and addressed it through the narrative restories outlined in Section 3.4.3, which contain the individual experiences of the participants. Thematic coding did not replace this narrative understanding but built on it through cross-case comparison. For the development of subthemes and themes, the restories were therefore always interpreted with due consideration of their narrative context.

3.5.2 *QUALITY AND RIGOUR*

Quality is central to qualitative research. It supports trustworthy and scientifically sound findings (Saunders et al., 2019). This study therefore requires a quality framework that is compatible with its constructivist philosophy and narrative inquiry design.

Researchers widely use reliability and validity as indicators of research quality in the natural sciences and quantitative social research. Reliability refers to the consistency and replicability of a research process or its findings. Validity refers to the appropriateness of the methods used, the accuracy of the analysis and the generalisability of the findings (Saunders et al., 2019). These concepts are contested in qualitative research because the researcher is closely linked to the data and the analysis is interpretative, while the data itself may be subjective (Morse, 2015).

Connelly and Clandinin (1990) also emphasise that narrative research should be framed in terms that are authentic to its own nature, rather than being forced into frameworks developed for other research approaches. They argue that every researcher is responsible for identifying and justifying the criteria most appropriate for their specific study (Connelly & Clandinin, 1990). This study follows their argument by recognising that narrative research seeks to create knowledge about human experience, both conscious and hidden (Polkinghorne, 1988).

This study defines rigour as an integrative quality that results from a reflexive research process. According to Clandinin and Connelly (2000), a strong narrative is characterised by its ability to explain and invite engagement, while also demonstrating authenticity and credibility. A key aspect of ensuring rigour in narrative inquiry involves considering whether the narratives accurately represent participants' experiences as they were shared.

Morse (2015) argues that reliability and validity, when interpreted through qualitative logic, contribute to rigour. This view treats rigour as the result of strategies used in data collection, analysis and interpretation. Morse also warns that strategies for achieving rigour are often used incorrectly or unsystematically, which may compromise the quality of qualitative studies, while no single strategy can guarantee both reliability and validity.

The researcher's position was explicitly considered throughout the study. As a former consultant with professional experience in project governance and transformation initiatives, the researcher brings prior knowledge and assumptions into the research process. To address this proximity, reflexive practices were applied during the narrative analysis process, including the use of memos and a sustained focus on participants' narratives. The analysis continuously reviewed interpretations against the original narratives to reduce the influence of predetermined perspectives.

This research applies a set of measures to ensure rigour and trustworthiness within the narrative inquiry framework. These measures strengthen credibility and validity by ensuring that the researcher's interpretations resonate with participants' perspectives (Morse, 2015).

Member checking was conducted after the narrative restories had been developed and before cross-case coding was finalised. Participants were invited to review both the interview transcript and the corresponding restory and to comment on the interpretation presented. Any clarifications or corrections provided were incorporated into the narratives. This process was intended to support credibility by ensuring that interpretations remained grounded in participants' accounts.

While the findings in this study are not statistically generalisable, they are made transferable through detailed contextual description. Readers can determine the extent to which the insights apply to their own or similar settings, thereby supporting transferability (Buchanan, 2012).

In addition, the use of narrative restories and a coding sheet containing unique identifiers for each code-to-theme connection contributes to transparency by making the analytical process visible. Readers can trace how individual experiences inform subsequent coding and thematic analysis, thereby maintaining an explicit chain from narrative accounts to analytical outcomes.

In conclusion, while the concepts of reliability and validity cannot be applied in this study in a rigid, positivist manner, they are reinterpreted to align with the constructivist and exploratory nature of narrative inquiry. Strategies such as member checking and contextual description support the credibility, transparency and transferability of the findings. In this way, the study meets research standards while exploring real-world experiences shared by project management professionals through their stories.

3.6 PILOT INTERVIEW

The pilot interview conducted before the main data collection was not documented through a separate restory, as its primary purpose was to validate the overall research design rather than to contribute to the empirical dataset. The focus was on testing the interview structure, the sequencing of questions and the suitability of the narrative approach for exploring governance experiences in Agile projects. Feedback from the pilot interview was used to refine the interview guide. The pilot interview therefore served as a methodological validation step rather than as a source of data for thematic or narrative interpretation.

3.6.1 *PARTICIPANT BACKGROUND*

The participant for the pilot interview was selected from the researcher's direct professional network. He is a recognised expert in transformation programmes with extensive project management experience. His background includes multiple SAP projects conducted using the SAP Activate methodology, which represents an Agile-oriented approach. However, he did not hold a specific Agile certification and therefore did not qualify under the criteria defined for narrative analysis. Instead, his academic and methodological expertise was used to validate the research design and provide direct feedback.

3.6.2 *PROJECT CONTEXT AND RESEARCHER COMMENT*

The project discussed in the pilot interview formed part of a large IT transformation programme. It was structured around SAP rollout projects and designed to apply elements of the SAP Activate framework. Although labelled as Agile, the projects operated within a

governance system that supported traditional Waterfall-based projects. The participant's perspective was shaped first by a delivery role and later by a governance advisory role. This transition gave him direct insight into how governance shaped outcomes. On the one hand, project governance created security and ensured consistent decisions across the projects. On the other hand, it limited the ability of teams to resolve issues independently and required extensive approval cycles, even for operational matters.

The pilot interview illustrated that governance structures were perceived as highly restrictive. Decision autonomy at project and team level was not available, to the extent that even routine matters, such as handling small deviations from the template or resolving minor system adjustments, had to pass through formal approval loops at programme level. This approach contributed to higher quality through repeated review cycles. However, it also caused significant delays for the projects and led to constant reworking of the project plan.

3.6.3 REFLECTION ON RESEARCH METHOD AND ADJUSTMENTS

The pilot interview confirmed that narrative storytelling unfolded naturally when the participant was given space to narrate. Key topics around governance structures emerged without prompting, and the participant engaged openly and provided detailed examples. This validated the design of minimal intervention by the researcher and confirmed that beginning with broad context before gradually narrowing towards governance topics was effective.

However, the pilot interview also revealed a fundamental analytical challenge. While the interview confirmed the richness of the narrative account, the governance model described by the participant was highly layered and complex. This created challenges in capturing and structuring the narrative, highlighting the need for a model to guide the coding process.

Based on the findings of the literature review, a sensitising framework was derived to support the coding process in this research. The model structures the research questions into a logical sequence and integrates relevant theoretical concepts accordingly. It combines governance roles, governance practices, dimensions of effective governance and success criteria, and provided an analytical outcome of the pilot interview. This overview served as a frame for the subsequent coding work.

In light of the inductive direction of this research, the methodological role of this framework requires clarification. The narrative interviews planned for this study generate data without the question-and-answer structure of semi-structured interviews. Participants were expected to

use widely varying terminology to describe similar phenomena. In this context, navigating the raw data line by line required a structured form of analytical attention rather than a structured set of predefined categories.

The framework therefore served as a sensitising framework in the sense established by Blumer (1954), providing the researcher with a general form of guidance for approaching empirically relevant instances without prescribing what those instances contain. The framework aimed to highlight when a line was potentially analytically relevant, for example when a participant described a person occupying a coordinating position, regardless of whether the term “PMO”, “project management office” or “steering board” was used.

The use of the framework also contributes to the quality and rigour of the study, as described in Section 3.5.2. It is consistent with the inductive orientation of this study and with the constructivist philosophy established in Section 3.1.4.

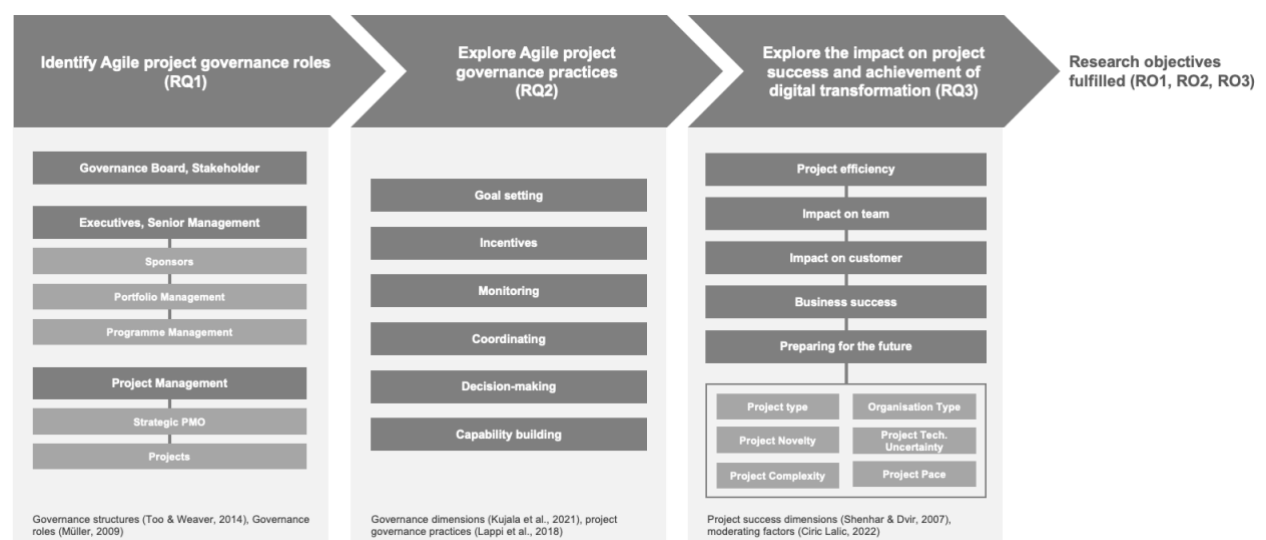


Figure 11: Sensitising framework (author's own)

4 RESTORIED AGILE PROJECTS

In the previous chapter, the research design was outlined. The interview results are shown here in the form of narrative restories. The study defines a restory as a structured summary of an interview as described in section 3.4 Narrative inquiry and narrative restories. Selected quotes highlight the essence of the conversation and form a basis for the subsequent analysis. The intention is to provide a perspective that enables each story to be interpreted on its own, with conclusions drawn at the end of each case, while also contributing to the thematic coding findings that are synthesised in Chapter 5.

4.1 WHISTLEBLOWER SYSTEM: LEAN GOVERNANCE AND REGULATORY PRESSURE (PARTICIPANT 1)

This narrative examines the global rollout of a whistleblower system initiated after compliance incidents. Governance was lean and largely informal, centred in the compliance function and dependent on two individuals

4.1.1 *PARTICIPANT BACKGROUND*

The participant has more than ten years of professional experience in the telecommunications and finance industries. He previously worked in accounting and moved into compliance as part of an internal transformation. Within the whistleblower system project, he acted as subject matter expert and operational coordinator inside the newly formed compliance function.

4.1.2 *PROJECT AND ORGANISATIONAL CONTEXT*

The project took place in the compliance department of a stock market-listed manufacturing group and emerged directly from a regulatory compliance incident. The organisation responded swiftly by reallocating budget for the project and expanding the compliance team. The goal was to implement a digital whistleblower system that would meet anticipated European regulatory requirements.

The compliance department acted as both sponsor and operator. The organisation tasked the participant as a project manager with establishing and implementing the system across multiple jurisdictions. He managed requirements definition, vendor coordination, legal alignment, testing, and documentation.

4.1.3 *PROJECT GOVERNANCE JOURNEY*

The project began after acute compliance incidents exposed structural weaknesses. Neither processes, nor structures, nor sufficient personnel were in place. The company decided to build a fully-fledged compliance function almost overnight, allocating substantial resources and recruiting external legal specialists.

“At that time, there were compliance incidents in the company, which made it necessary to set up the compliance department. [...] Suddenly, a great deal of budget was released, and many people were quickly hired from outside, especially legal specialists.”

The expectations were high at the outset. Immediately after the onboarding of the resources, the introduction of a whistleblower system was initiated, intended as a central and compliant entry channel for reports. The belief was that purchasing a software tool, opening the channels for managing reports and processing them would be enough.

“The idea was that we buy a software, open the channels and then process the incoming reports.”

The organisation quickly identified and purchased a suitable tool from a leading vendor, allowing the rollout of this out-of-the-box solution to begin and enabling processes to be deployed globally at speed. However, as soon as the global rollout was prepared, legal conflicts became apparent. Each country had its own rules on data protection, storage and anonymity, forcing the project into difficult negotiations.

“It was not so easy to roll out a standard software, because in every country we first had to understand the legal situation regarding data protection and data security.”

Tensions arose especially with local entities, as works councils and compliance officers insisted on their information rights, adding layers of approval and slowing down the progress.

“What information rights and approval requirements exist differed in every country.”

This suddenly increased the complexity drastically. Not only were the requirements country-specific, but they even contradicted each other in parts, as the participant illustrated with the example of Spain.

“There were countries such as Spain, where you were only allowed to report anonymously, and others where anonymous reporting was not permitted at all.”

Some jurisdictions became so contentious that they were excluded from the early rollout. Only once other regions were stabilised could these more difficult cases be addressed, as decided by the responsible compliance executive and the project sponsor.

“Hard cases such as Spain came only at the very end.”

The project dragged on for over a year and kept expanding in scope. Resigned, the participant noted that it was not enough to rely on this so-called out-of-the-box solution, as it required extensive adjustments that had not been foreseeable at the beginning.

“What started as simply buying a tool turned into quite a complex transformation project.”

When the rollout reached Spain, the participant moved from being part of the core team to carrying direct responsibility for this jurisdiction. His role added pressure, as he was covering project management, carrying dual responsibilities without any support, such as from a dedicated PMO.

“We were two in the team, responsible for introducing the system and defining the requirements.”

His task was to manage the rollout, gather the requirements with the Spanish subsidiary, and feed them into the project for implementation.

“I covered both the project requirements in terms of content and also the project management.”

This autonomy gave him freedom to move quickly but also exposed him to constant demands. Lean governance meant fewer layers of control but also left little room for error.

“Governance was relatively lean, which is why we moved forward relatively quickly.”

The participant illustrated this with decision-making, as it was concentrated in the compliance department. A legal manager set the framework but relied heavily on younger staff for technical details, which placed additional responsibility on them.

“The manager at the time was a lawyer and not technically versed ... he let himself be briefed, options were outlined to him, and then he said: let’s go left or right.”

Meanwhile, the vendor was increasingly required to take responsibility for carrying out deeper interventions in the system. Collaboration was close, but critical moments remained. Stakeholders often discovered critical requirements too late in the process during the testing phase with the national subsidiaries. Additional requirements continued to emerge. Although the vendor was responsive, this created late changes and delays.

“We tested in the test system: creating a report, reassigning it, marking it as not pursued further, or turning it into an investigation.”

Weekly meetings and additional calls with the vendor stabilised the process, and the vendor responded with increased responsiveness. Yet the project remained under pressure. Despite the progress made, the continuous negotiation of missing requirements and the trial-and-error nature of testing created a cycle of recurring setbacks that had to be managed.

“We had a larger project status meeting once a week ... and if we wanted changes, we called the vendor and two days later it was in the test system.”

After months of negotiations, testing and adjustments, the whistleblower system was successfully rolled out across all regions. The project closed with a working global solution. Even difficult jurisdictions such as Spain were integrated. Speed and autonomy enabled success, but the concentration of knowledge and responsibility on only two people made the project fragile.

“Everything was in our heads and in email threads.”

Pride in the achievement and awareness of its fragility shaped his view of this project at the end.

“If one of us had left, the whole thing might have collapsed.”

4.1.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

Through this experience, the participant developed a different view of governance. Initially expecting classic project structures, he discovered that lean, embedded decision-making could be effective.

“Decisions were made quickly because we had both the knowledge and the authority.”

He also recognised the limits of such autonomy as there were no buffers, no escalation paths, and no formal documentation.

“It worked, but it wasn’t scalable. It relied on two people not making mistakes.”

Reflecting across his projects, the participant contrasted the lean set-up of the whistleblower project with the more complex structures of larger programmes. Decisions were concentrated and roles were clear. By comparison, he described later projects as shaped by multiple stakeholders with divergent priorities. Governance therefore meant balancing short-term project pressure with long-term operational responsibility.

“There are stakeholders in the project with short-term interests ... and others from the line who only care about long-term quality.”

He also observed how governance complexity increased across projects and how this became visible in reporting practices. In the whistleblower project, weekly meetings with clear updates were sufficient, while in larger programmes reporting multiplied across stakeholder groups.

“Because reporting was so Agile and ad hoc ... it led to communication problems and effort.”

4.1.5 RESEARCHER COMMENT AND SUMMARY

The participant shared a narrative of a compliance project that unfolded without formal governance structures, but under high regulatory pressure. The interview was conducted online and lasted 65 minutes. The participant presented his account in a structured and reflective manner. Throughout the interview, he spoke in a matter-of-fact way, focusing on concrete events and operational decisions. These details provided a direct view into how governance emerged through day-to-day coordination and individual accountability. The tone

shifted from initial pragmatism to a more resigned recognition that assumptions about the “out-of-the-box” solution had been misplaced.

The researcher's own experience as a project manager shaped the interpretation of this narrative. Having encountered "lean governance" as a paraphrase for informal structures and ad-hoc decision-making in previous projects, the researcher initially approached the participant's positive framing of minimal governance with scepticism. This perspective may have limited exploration of why the participant viewed this minimal structure as advantageous.

Three aspects stand out for the researcher. First, the shift from buying a tool to managing a complex transformation project demonstrates how governance evolves. The initial underestimation of legal and organisational requirements resulted in a lean governance approach shaped by operational pressure rather than formal design.

Second, the concentration of knowledge and authority in two individuals created not only agility, but also significant risk. The participant highlighted that efficiency was achieved through autonomy and proximity, but no safeguards were in place should either individual have become unavailable.

Third, governance in this narrative had to address key tensions, such as between global standards and national legal constraints, or between delivery speed and compliance. The narrative illustrates a pragmatic approach to handling these tensions by focusing on what could be implemented first and deferring more difficult cases.

Regarding the research questions, the case suggests that governance roles in Agile contexts may be fluid, overlapping and situationally rather than formally assigned (RQ1). Governance practices can remain minimal yet effective when knowledge and authority are concentrated (RQ2). Project success in this setting appeared to depend less on formal structures and more on individual capability and continuity (RQ3), although this reliance introduced systemic risk, acknowledged as a weakness by the participant himself.

4.2 TRADING PLATFORM: INCREMENTAL DELIVERY PRIOR TO AGILE FRAMEWORKS (PARTICIPANT 2)

This case explores the development of a new stock trading platform delivered through an incremental approach. Governance was shaped through direct executive engagement of the Chief Technology Officer (CTO), who took rapid decisions on informal basis.

4.2.1 PARTICIPANT BACKGROUND

The participant is a former technology consulting Partner and experienced programme and project executive, with over 30 years of professional experience in the telecommunications and insurance industries. Most recently, he held senior leadership roles in large-scale transformation settings within the financial service and insurance sector. His experience in Agile ways of working in projects dates to the 1990s, before the rise of formal Agile frameworks. In one of his early projects, he and his team intuitively adopted an incremental delivery approach. Rather than designing everything upfront, they focused on building and testing core components early, as he explained.

“It wasn’t called Agile back then, but the principle of building something visible early, then refining it through feedback – that was already there.”

4.2.2 PROJECT AND ORGANISATIONAL CONTEXT

In the interview, he reflected on a completed Agile project in the financial services sector, which was characterised by strong regulatory constraints and the involvement of external consultants in coordination functions.

The project was the development of a stock market trading system to replace the system from the 1990s. Despite being executed before the formalisation of Agile methods like Scrum, the project embraced iterative and incremental delivery principles. The organisational structure included a cross-functional development team, external consultancy support, and close collaboration with both IT and business leadership.

4.2.3 PROJECT GOVERNANCE JOURNEY

The project began around the year 2000 and the company scheduled it for two years of development. For the participant, it was a milestone in his career because, for the first time, a different path was taken from the traditional Waterfall model. Two colleagues had the idea of dividing the work into smaller stages.

“We are not doing it Waterfall. We are doing many small Waterfalls.”

The participant took up this idea and developed it into a concrete project plan. His official title was Test Manager, but his role went far beyond this. In addition to quality assurance, he also provided direction for the development and took on management tasks.

"I was actually responsible for product testing. I was Test Manager, but in practice I specified to development what they were to build."

At the centre of the work was the matching algorithm, the core of the trading system. Every extension was tested against it to ensure functionality. The participant emphasised that this part of the system was tested more than any other.

"That was then the most tested slice of the entire product."

The CTO and the Steering Board maintained project steering through weekly status meetings. These meetings remained efficient and focused despite the size of the project with more than 250 people involved.

"An entire project with over 250 stakeholders was completed in one hour per week."

The emphasis was on tangible progress instead of relying on extensive presentations. This was essential for the participant in building confidence in the project's ability to deliver.

"The product speaks for itself."

Several months later, the team had to turn to the matching algorithm, the most complex part of the system. Its difficulty had been underestimated, causing the work being to be pushed back until much later in the project. As the analysis progressed, it became clear that the component was far more complex than expected. Much of the planned time was lost to analysis and implementation as new dependencies emerged. The time available for testing, the most critical activity, was reduced to half of what had originally been scheduled.

"We had actually planned six weeks; in the end it was only three."

For the participant, the pressure grew continuously. He carried responsibilities far beyond his formal role and described how he spent many nights in the office preparing plans, shifting priorities and clearing bottlenecks. Working in small increments helped him stay flexible, but the strain remained high.

"I was completely overstretched as a project manager who was in fact not even one. [...] I spent many long nights in the office."

When the participant felt incapable of making progress on his own, he raised the issue directly with the CTO as sponsor during a meeting and asked for support. The CTO then visited the project office to gain a first-hand view of how the work was unfolding. The team used the moment to speak openly about the problems in the project.

“The CTO once walked in with a cup of coffee, sat down with us and started discussing the project directly.”

The CTO's presence at eye level, in an informal and direct way, created a sense of trust and support. From that point onwards, contact with him became more frequent and he engaged directly with the team rather than relying on formal reporting. The participant recalled that this helped the team to set clearer priorities and focus on what mattered most. Decision making became faster, discussions were more open, and the project gained renewed momentum.

“He came by quite often... we already knew each other from previous projects, everything was on first-name terms, it was all very easy-going.”

The CTO's involvement helped to establish stability and made it possible for the participant to create a clear roadmap, with the project status always remaining transparent.

The project manager supported transparency through a large visualisation of the project's progress, displayed as a poster in the project area. This made it clear which functions were already complete, and which were still outstanding.

“I created this big wall chart... that was basically our roadmap.”

Day-to-day collaboration was shaped by direct communication based on the big wall chart. The project team addressed problems immediately and resolved them without delay. The participant contrasted this with traditional projects, where escalation often took much longer.

“It was real time. You were right in the middle of the team... immediate reactions... little politics.”

However, the impact extended beyond this. The CTO's involvement encouraged the senior managers to engage also with the project outside of the formal steering meetings. This not only accelerated problem-solving but also released creativity for exploring alternative solutions. One vivid scene was the development of “trading safeguards”. Together with senior

managers, the participant worked on scenarios at a flip chart in a meeting room, without preparation, in the spirit of open brainstorming. For him, it reflected a growing climate of trust in which ideas could be shared.

“These things happen when people know each other, trust each other, and are willing to voice a crazy idea.”

Ultimately, the project was delivered a day earlier than planned. During the subsequent three months of user testing, the participant remembered that only one defect was found – for him, an extraordinary outcome that validated the chosen approach.

“We had a fixed delivery date, finished one day earlier and, during the three-month user test, only had one defect.”

Looking back, he stressed that this success was only possible because his managers placed trust in him and gave him the freedom to take responsibility.

“They at the time gave me the trust that I could really plan this out.”

4.2.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

In reflecting on the projects in his career, the participant described governance less as a formal structure and more as a bridge between the project and the organisation. It translates what the team delivered into something that could be understood and accepted by the wider company.

“Governance for me in this case is a kind of interface into the existing organisation.”

Over time, his perspective developed towards seeing project governance as a framework that must protect creative work. It was not only about compliance but about creating the conditions in which teams could thrive.

“They have to create this ecosystem, this creative space, and at the same time satisfy the rest.”

His reflection also shaped the way he looked at supporting functions. No Scrum Master role was involved. Instead, several people handled responsibilities intuitively. In his view, functions such as the PMO should take on elements of a Scrum Master role in an Agile environment, ensuring that project staff could maintain their focus on the actual work.

“The surrounding functions of the PMO should take on a kind of Scrum Master function... and in your case that was spread across many heads.”

This led him to focus on the empowerment of project managers. From his point of view, governance should enable frequent decisions and rely on trust within the team.

“You have to make smaller decisions frequently and the project manager must be empowered. The team must have trust.”

Even in leadership positions, he came to believe that the mindset of a servant leader was essential. He contrasted this with directive management, emphasising the role of listening and problem-solving.

“Even if I hold a leadership position, I must have the mindset of a Scrum Master – not the one who dictates, but the one who observes, listens, and removes problems.”

4.2.5 RESEARCHER COMMENT AND SUMMARY

The interview had a reflective manner and took one hour. The participant spoke in a pragmatic tone. His descriptions of technical matters were brief, while interpersonal dynamics were explained in more detail. When discussing Agile practices, the participant focused less on frameworks and more on what worked in context. What stood out was the way he illustrated the atmosphere through concrete scenes. These moments make the story tangible and bring it to life.

The narrative is shaped by the researcher's curiosity during the interview. At the time of the project in 2005, Agile frameworks began to appear in the researcher's work context and companies were starting to gain experience with them. Therefore, the conversation developed towards how operational project management was handled and how collaboration with different stakeholders, including governance, took place.

Two aspects stand out for the researcher. First, the ambiguity of roles in the participant's position: officially Test Manager, but in practice also carrying product, project and quality responsibilities. This concentration of duties created an unsustainable personal pressure and was intensified by constant replanning and coordination demands, while the PMO provided only limited administrative support and could not reduce the load he carried.

Second, governance was reshaped through informal executive presence. The CTO's direct engagement changed project dynamics by shortening decision paths and creating an environment of trust. This contrasted with the formal board meetings, which appeared efficient but concealed the real coordination load carried by the participant.

For the research questions, this narrative suggests that governance roles in Agile projects may emerge through necessity rather than formal designation (RQ1) and that informal practices such as executive presence can outweigh formal steering structures (RQ2). This narrative highlights that project success may also be linked to individual flexibility and commitment (RQ3).

4.3 COLLABORATION PLATFORM: AGILE WITHIN A RIGID CONTRACT SETTING (PARTICIPANT 4)

This account focuses on the introduction of a cloud-based collaboration system governed by a fixed contractual scope in an organisation lacking Agile experience.

4.3.1 PARTICIPANT BACKGROUND

The participant is a PMI-certified project manager with a background in automotive and software development contexts. He began his career employed at a consulting firm, starting in a PMO role for internal projects before moving on to client engagements. Initially focused on classical project management, his interest in Agile methods grew over time. He has gained extensive experience in leading diverse projects over the past five years with frameworks such as Scrum or Scaled Agile Framework (SAFe). He advanced into a leadership position and not only manages projects but also coaches his team members on project management standards.

4.3.2 PROJECT AND ORGANISATIONAL CONTEXT

The project concerned the transformation of an on-premises identity and messaging system into a modern, cloud-based collaboration tool. It was commissioned by an energy utility organisation characterised by hierarchical structures and strict regulatory frameworks. The driver was the need to replace legacy tools for data protection and to improve collaboration across the organisation. The client aimed to implement a secure, custom-built solution with a high standard of usability. A detailed requirements specification formed the contractual

foundation. From the outset, scope and budget were fixed, while the organisation simultaneously expressed the desire to work in an Agile way.

4.3.3 PROJECT GOVERNANCE JOURNEY

The project began with ambition and energy. After the contract had been signed, the participant, acting as project manager and leader of the consulting team, initiated the project and assembled the team. As a first essential step, he worked with the catalogue of 220 requirements, which had been set as a binding part of the contract.

“At the beginning, we had a requirement document with about 220 functional requirements which were contractual obligations.”

The client was motivated, excited by the novelty of Agile methods, and willing to learn. Consultants delivered training sessions to familiarise staff with Scrum roles. For many, it was the first exposure to Agile ways of working, and they were motivated to take part.

“For the client, it was new and there was a lot of curiosity.”

The project team introduced Agile structures to bring this ambition to life. They created the backlog from the contractual requirements and prioritised with the client. The participant established tools such as JIRA and Confluence as central project platforms. Agile ceremonies replaced traditional routines, Daily Stand-up meetings substituted for fixed project status meetings, and sprint reviews were set up to create feedback loops.

“Agility should always be supported with a tool, otherwise you get lost. In this project we worked with JIRA and visualised the entire development flow, accessible to the client.”

The curiosity on the client side and the ambition of the project team led to a rapid start, with the prioritisation of requirements beginning immediately.

“We had a backlog, that was fed from the contractual requirements, then prioritised together with the client and processed within a sprint.”

As the project progressed, tensions began to appear. The development teams worked through the backlog, defined user stories, agreed definitions of done in line with the contract. The client

demanded a detailed schedule and time-based estimates, which conflicted with the team's approach of estimating future effort for comparable requirements based on complexity.

"The client found it extremely difficult to move away from the metric of time."

The team continued their work on the backlog and user stories, but for the participant, these constraints made the project atmosphere increasingly frustrating. After demanding a detailed schedule, the client went on to question the implementation time of individual features and imposed detailed limits on their size according to his judgement or specified how large they should be.

"User stories had to be larger than four hours but smaller than two days, otherwise it would not work for the client."

Once the backlog had been prepared, the implementation phase could begin. However, the contractual framework, with its fixed timeline and the client's specifications in the sizing of user stories, meant that the team could not work with fixed sprint cycles. Instead, more flexible sprint lengths were defined to accommodate these constraints.

"There are different cycles, whether four weeks or two weeks, but we adapted the standards and set them up in the way we needed them for the project."

The first cycles started well. Development progressed and after a few cycles the team was excited to present the initial results to the customer. The participant prepared a sprint review meeting with demonstrations of the software and progress updates. He was expecting dialogue with the Steering Committee as decision-maker, but they did not attend the meeting and demanded a formal project report with forecasts and risk assessments.

"They did not attend sprint reviews; decisions were escalated upwards and made in the traditional format."

Although the team delivered according to the agreed cycle, the client became increasingly dissatisfied with the reported progress. The long intervals between reviews meant that expectations were rarely met, and the atmosphere on the client side deteriorated over time.

"After three months the results were not as hoped, and the frustration on the client side was too high."

This was a turning point for the participant. The project team realised that while the client wanted Agile in principle, governance continued to follow traditional logic. Without senior

presence in sprint reviews, feedback loops weakened. Issues that required quick resolution were escalated to the Steering Committee, where they were processed through formal templates.

“When problems arose, people reverted to the old world and escalated issues to the Steering Committee.”

Serious difficulties emerged then from the requirements catalogue itself. Because the client insisted on following the contractual order of implementation, the team had no room to adjust priorities. Among the 220 requirements they identified so-called black swans, requirements whose complexity had been severely underestimated. For example, the introduction of a video-call function to the messenger, proved so demanding that it effectively became a project in its own right.

“What we also had to realise was that some of the contractual requirements were black swans. The effort for certain requirements, whether in terms of programming or coordination, was so different that comparability was no longer possible.”

The emergence of black-swan requirements created the risk of a project stop. From that point onwards, escalations could no longer be resolved within the teams and had to be addressed through top management of the respective parties. The client reacted by establishing a Project Management Office (PMO), which was central for tracking progress and preparing information for the Steering Committee.

“It was the PMO that prepared the templates and forwarded information to the Steering Committee.”

The PMO reinforced a traditional reporting cycle, even though the teams used Agile boards that already contained all information. As the project deadline approached, these contradictions became more visible. JIRA showed progress through burn-down charts and flow metrics to the team, while the Steering Committee continued to request classical reports. The participant explained that, even though all relevant data were available in JIRA, it was not in the form the client expected. As a result, he was forced to spend considerable time re-preparing the information for reporting.

“We tried to capture statuses ad hoc, even hourly sometimes, it led to misunderstandings. It was not standardised and required considerable effort.”

Consequently, the project went live partially. The contractual finish date was met, and the client took the outstanding releases out of the project and handled them separately. The client was able to work with the 60 % of features delivered, but key functionalities such as video capability were not implemented. The collaboration ended, and the vision of a fully delivered Agile product was never achieved for both sides.

“We went live with 60–70% of the intended features. Further releases were delivered afterwards.”

After the project, the participant reflected self-critically that the chosen Agile approach addressed the requirements of the proposal but did not meet the client’s expectations. Given that the client had little prior experience with Agile methods, a more hybrid approach, combining Agile practices with elements familiar to the client, might have been the better choice.

“In my observation, it is usually always a hybrid approach where elements of both worlds are combined.”

4.3.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

Over time, the participant’s perspective on governance shifted from initial ambition to a more critical assessment of what was feasible in the given environment. At the outset, he saw value in introducing Agile practices to stimulate change. The idea was to create impulses that would not have emerged under a strictly traditional model.

“We wouldn’t have been able to set any impulses if we had handled the whole thing in a strictly Waterfall way.”

As the project moved on, his view changed. Contractual framework, fixed timelines, and the Steering Committee’s preference for classical reports limited the space for an Agile way of working. While the teams worked with Agile boards and tools, he observed that decision-making remained firmly anchored in traditional governance.

“Because the reporting was so Agile and we tried to capture status updates ad hoc, even hourly sometimes, it led to misunderstandings. It was not standardised and required considerable effort.”

From these experiences, he concluded that projects in such contexts do not follow a single model. Instead, they combine Agile practices with established structures.

“In my observation, it is usually always a hybrid approach where elements of both worlds are combined.”

Looking back, he acknowledged that the Agile approach chosen for this project addressed the formal requirements of the proposal but did not align with the client’s expectations. With the client’s limited exposure to Agile working, a hybrid approach that integrated more familiar elements would likely have been more effective.

“It would have worked out better if we had dared to be more Agile – but it just wasn’t possible, because it was a first-time project, an innovation project, and so on.”

4.3.5 RESEARCHER COMMENT AND SUMMARY

The participant had clearly reflected on the project in advance and was able to present it fluently, in detail and with considerable energy for around 30 minutes without interruption from the researcher. The interview lasted approximately 90 minutes. The participant presented his narrative in a pragmatic way, focusing on concrete experiences.

The participant’s description shows how contractual frameworks and hierarchical decision-making have limited Agile practices on team level, despite a common enthusiasm and the adoption of Agile tools and ceremonies at the beginning of the project. As he reflected on the outcome, his tone shifted and turned into a more personal note of regret. He acknowledged that the fully Agile approach proposed at the beginning, in line with the offer, was not the right approach for this client, and his frustration was noticeable in particular when describing the project’s conclusion.

The researcher has a consulting background and experience in delivering projects as a project manager for clients. As part of the reflection process in preparing the research, this background was considered carefully to reduce the risk of bias. The chosen approach was to ask the participant to present the project in a comprehensive manner and to avoid interruptions or follow-up questions during the initial narration.

During the narrative, the researcher was able to comprehend the participant’s explanations due to similar experiences, especially when clients placed less emphasis on advisory

competence and stronger emphasis on implementation. When valuable insights gained through consulting remained unused, it could be frustrating for consultants, who saw potential benefits not being realised.

The central point of this narrative is that the contract was binding and determined the project from the outset. The requirements catalogue with 220 items was transformed into a backlog, but there was no flexibility to reprioritise or adapt scope as the project evolved. Even operational details, such as the size of user stories, were dictated by the client, showing how Agile terminology was applied within a rigid contractual framework.

This became clear from the reporting and the understanding of roles. While teams worked with JIRA boards showing real-time progress, the Steering Committee demanded classical reports. Although all data were available in real time, governance followed familiar patterns and prescribed a specific reporting format. It was also evident that the further the project progresses, the more rigid governance became. The client's response, particularly the establishment of a PMO, showed how uncertainty in this project was addressed by reverting to established structures of formal reporting and escalation.

For the research questions, this case reveals that formally introduced Agile roles may be reshaped or overridden by persistent traditional governance structures and roles (RQ1). Parallel governance practices, with Agile boards on the one hand and traditional Steering Committee reports on the other, created both inefficiency and confusion (RQ2). In terms of project success (RQ3), the contract was fulfilled with a go-live on the agreed date, but only around 60 % of the planned features were delivered.

4.4 SAP ROLLOUT: GLOBAL STEERING MEETS LOCAL ADAPTATION (PARTICIPANT 5)

This restory contains a S/4HANA rollout embedded in a global transformation programme. Governance combined strict programme structures, but with freedom for local implementation projects. This approach benefited particularly from team proximity.

4.4.1 PARTICIPANT BACKGROUND

The participant is a senior executive at an international consulting firm with long-standing experience in complex IT transformation programmes, especially in the field of SAP implementations. He has worked across diverse organisations, bringing a strong background in project management, governance in multi-stakeholder and cross-cultural settings. In the

case presented, he first joined as a member of the Programme Management Office to help set up the programme and was later appointed Project Manager for several S/4HANA rollouts, experiences that are at the centre of this narrative.

4.4.2 PROJECT AND ORGANISATIONAL CONTEXT

The programme took place in an automotive company and aimed to replace the existing local SAP environments with a global S/4HANA solution. At its core, the programme focused on developing a standardised system design defining processes, structures, and configurations across the group. This template was built using a greenfield approach, tested in a pilot market, and subsequently refined.

Each country implementation was delivered as an individual project within the overall programme. While the global template provided the common foundation, the countries required local adaptations to address their specific legal or business needs. This story focuses on the project in Italy, which involved the implementation of the global S/4 template across four local entities. For reasons of confidentiality, Italy as a project location is used illustratively and any connections are therefore coincidental.

4.4.3 PROJECT GOVERNANCE JOURNEY

The decision to implement S/4HANA marked the beginning of a challenging transformation, replacing the distributed legacy ERP landscape with a unified global system. One of the first decisions taken was to adopt the SAP Activate methodology as the central framework for delivery. The participant described the strict adherence to the phase model of Activate, supported by quality gates.

“We followed the clear phase model – Prepare, Explore, Realise and Go-Live – each with fixed quality gates.”

However, both the client and the consultants had little prior training or certification in SAP Activate and largely taught themselves its logic. On both sides, PMOs were established to coordinate delivery during the prepare phase.

“We started with the Activate methodology. It was still relatively new at the time, and both we and the client had no real training or certification. The theoretical background was brought in by us, but essentially everyone had to teach themselves how to work with Activate.”

The project gained momentum, when staffing began. The programme management defined the quality gates, mandatory requirements, and the templates. One important quality gate was the Template Decision Board, which served as the forum where project teams and headquarters aligned on whether country-specific requirements should be incorporated into the global standard template. Legal requirements were non-negotiable. Over time, this process gradually altered the original Greenfield design of the template.

“The Template Decision Board is the organisational body where the projects align with headquarters.”

The client established the Programme Management Office, and the first service providers began their work with their own PMOs. The functional requirements were managed through the Template Decision Board. This governance framework was perceived as being highly structured from the very beginning.

“From the start, the programme had a very classical structure. On the client side a Programme Management Office was established, and on the service provider side we maintained our own PMO, reporting into the programme office.”

During the Explore phase, the programme underestimated the complexity of balancing global requirements with local adaptations. This became particularly visible in the Italian rollout project. The original plan was to bring all four local entities live in a single rollout. Already at this early stage, it became evident that this plan could not be delivered within the available resources and timeline. As result the project decided to split the implementation into two rollouts, each covering two entities.

“The project manager together with the market decided: we simply cannot achieve this. We will split it. We will do two entities first and afterwards the others.”

At this point, the number of service providers increased. Each service provider established their own PMO structures within the project. They were responsible for operational tasks such as invoicing and budgeting and reported into the client’s programme office.

“Every provider had their own PMO to cover tasks such as invoicing and budgeting, ensuring direct connection to the client’s programme governance.”

Staffing on the client side also increased. Initially, many employees in the Italian market continued to balance project tasks with their line responsibilities. This dual workload often caused delays and reduced efficiency, particularly visible in complex rollouts such as the first implementation of the two entities.

“People were taken out of their line functions and moved into the programme. Their job was now only to support S/4 for several years. This was extremely helpful because the usual conflicts between line work and project work simply did not exist in this constellation.”

At the end of the Explore phase, the participant created a detailed project plan in Microsoft Excel and aligned it with the programme. When entering the Realise phase, the participant described that he had the freedom to establish a framework at team level. The participant broke down the overall project plan into weekly tasks, using the timetable to create short cycles to make the work more manageable.

“At the beginning of each project we introduced what we called the timetable.”

He structured the work with regular check-ins, Daily Stand-up meetings, and reviews, establishing a weekly cycle that helped the team manage its delivery tasks. He used these routines to track the tasks closely and to ensure tight alignment with the team, while maintaining clarity about responsibilities and progress.

“We had a weekly check-in with the project team, stand-ups mid-week, and a weekly review on Fridays.”

Due to his approach, transparency was a central element. By making the weekly tasks visible, the team shared a common understanding of responsibilities and progress. This visibility not only reduced the risk of overlooking important work but also highlighted accountability, as contributions were apparent to everyone involved.

“All activities of the project team were visualised on a Kanban board. For me it was always immediately visible who was doing what and whether anything was being forgotten.”

While the approach at team level was established and functioning, new problems emerged. In addition to the well-known resource constraints in Italy, collaboration between Germany and

Italy became increasingly difficult, and more misunderstandings arose regarding tasks and responsibilities.

“The first Italian rollout was a complete mess. The local staff were excellent, but they were overstretched.”

The project plan for both rollouts soon proved impossible to maintain. For the second rollout, the participant reworked the plan entirely, incorporating the insights and experiences from the first rollout into a new planning approach.

“I sat down for a week for the second Italian rollout and reworked the project plan from the first rollout, an Excel file with 1,200 lines.”

The reporting requirements set by the programme were extensive, but they proved helpful in making the project status transparent at any time and in creating a basis to search for solutions immediately. “There were status reports to programme management, monthly budget reviews, and town hall meetings. These routines ensured that alignment was always clear and there were no surprises.”

The programme itself recognised the problems in the same way and decided along the project team to relocate a dedicated expert from Germany to Italy for the entire duration of the project to ensure the adherence to the revised project plan.

“He moved to Milan for one and a half years. He is an absolute top professional, strong in expertise and a very good fit on a personal level.”

The participant revealed how the first Italian rollout had exposed him to an exceptionally high workload, with long hours and constant pressure. The situation changed markedly in the second rollout when the person took over key tasks locally, reducing the pressure on the participant and the overstretched Italian team.

“Because of the dedicated resource on site and the revised project plan, the second rollout was really solid in comparison.”

When describing the second Italian rollout, the participant noted, with a hint of irony in the style of textbook education, how smoothly the closing stages unfolded. After the difficulties of the first rollout, the second rollout was presented almost as if nothing had ever gone wrong.

"At the end you move into a user acceptance test and then into the so-called go-live, when the system is switched on at some fabulous weekend."

4.4.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

The participant reflected on how his perception of governance changed during the programme. He acknowledged that the overall approach often appeared very rigid.

"The quality management catalogue was set in stone. Even if the templates sometimes seemed unnecessary, there was no way around them."

Despite this rigidity, governance also shaped mechanisms for learning and adjustment. Retrospectives helped the programme to evolve and to benefit from the experiences made in the local projects.

"We firmly established retrospectives, called Lessons Learned sessions, held both internally and with the client. The purpose was to share what we had learnt as openly as possible so that the next rollout could be smoother and more effective."

Over time, governance was experienced as something that both set boundaries and enabled learning.

"Actually, it all sounds rather Waterfall-like, but with each country rollout, governance and methodology are further developed."

He also underlined within this framework, that projects had a high degree of autonomy. Local teams were able to define their own way of working, while the programme provided support when needed, such as with budget and resources on the local market. Governance was therefore understood not only as control but also as support, enabling projects to take ownership of their delivery.

"At the beginning of a phase I look ahead with the whole team at what lies ahead for the next three months. Then, week by week, the team decides who does what. It is no longer about commands but about enabling the team to take ownership."

4.4.5 RESEARCHER COMMENT AND SUMMARY

The participant conducted the interview in a highly factual, direct and honest manner, often with a self-critical undertone. His narrative was well-structured, reflecting the methodical set-up of the programme itself. The conversation lasted about 70 minutes. He described the programme phases chronologically and used SAP Activate terminology naturally throughout. The tone shifted markedly between his account of the first Italian rollout, “complete mess”, and the second, “really solid”, with ironic distance when recalling the textbook go-live process at “some fabulous weekend”.

At the beginning of the interview, the researcher quickly formed the impression that the rigid governance practices described were typical for the programme. This connected directly with the researcher’s own experience in SAP project settings, where in Agile projects highly detailed project plans were frequently required. These plans were then often changed repeatedly under the label of agility, which in practice led to fundamental discussions with both the client and the project team.

Against this background, the conversation often turned to the tension between strict programme control and the degree of autonomy available to the teams, with particular attention to how rigid the governance was and how this influenced the Agile ways of working within the teams.

Firstly, the participant repeatedly used expressions such as “set in stone”. These descriptions suggest that governance at programme level was perceived as rigid and traditional in its orientation. Meanwhile, the account highlighted supportive aspects, such as the allocation of additional resources, and learning mechanisms, including retrospectives and lessons learned, which created space for adaptation across rollouts.

Secondly, the participant focused on his role in mediating between levels of governance. He described how programme demands were translated into workable practices at team level, for example by combining mandatory planning requirements with Agile routines such as Kanban boards, weekly check-ins and stand-ups.

Thirdly, the narrative demonstrated how a single intervention could change the course of delivery. The relocation of one dedicated resource to Italy was described as the decisive factor that stabilised the second rollout, pointing out how the presence of the right individual could influence project success.

Several aspects remain unexplored due to the project's complexity, in particular the actual role of multiple PMOs beyond reporting structures, and reasons why the programme extended from seven to eleven years. Cultural differences between Germany and Italy were mentioned but not elaborated.

The case illustrates how formal governance roles at programme level (Programme PMO, Template Decision Board) and the multiple provider PMOs created a rigid but structured framework, while informal bridging by the project manager enabled delivery at team level (RQ1). Governance practices combined prescribed elements such as templates and quality gates with Agile routines and learning mechanisms like retrospectives, requiring constant translation between programme demands and team practices (RQ2). Success, visible in the shift from a failed to a stabilised rollout, depended less on methodology than on revised planning and the presence of a dedicated on-site resource, even though programme structures provided the framework for recognising and addressing shortcomings (RQ3).

4.5 GLOBAL PRODUCT PLATFORM: RESHAPING SCALED AGILE (PARTICIPANT 6)

This case narrative is about the redesign of governance within a global product platform after an initial SAFe setup created high alignment overhead without clear authority.

4.5.1 PARTICIPANT BACKGROUND

The participant has an extensive background in Agile transformation and governance, progressing from single-team roles to senior leadership. His career spans from Scrum Master, through Agile Coach and Agile Team Lead, and finally to Head of Department responsible for organisational design. At the time of the project, he served as Head of the Lean Agile Centre of Excellence (LACE) within a large insurance company, steering governance structures at programme level and working directly with C-level executives.

4.5.2 PROJECT AND ORGANISATIONAL CONTEXT

The project was part of a large-scale transformation within a global insurance and financial service company. Its goal was to establish a digital platform to generate cost savings through standardisation, while enabling controlled local customisation. The programme setup included more than eight Tribes, each with over one hundred members, and a central LACE team of fifteen people. The initiative started with SAFe terminology introduced by an external

consultancy, but evolved into a self-defined hybrid approach, combining elements of SAFe, Scrum and others.

The participant took over responsibility for methodology and governance structures around four years before the interview, when the programme was launched at a major global insurer. For two years he served as Head of the Lean-Agile Centre of Excellence (LACE), overseeing the framework design, strategic alignment, and the coordination of Agile coaches and PMO functions.

4.5.3 PROJECT GOVERNANCE JOURNEY

Confronted with increasing competitive pressures, a company in the financial services industry decided to launch a transformation programme to enhance efficiency and to enable effective collaboration across countries.

“The question was how we could work together more efficiently on a global scale.”

Due to the limitations of legacy systems, the subject of the started transformation was to establish a common digital platform that combined global standardisation with the flexibility of local adaptation.

“The idea was to implement standardised products globally and allow local customisation in certain areas.”

From the beginning, the programme opted for an Agile approach, as it was already a standard approach in IT at that time. While the IT organisation was familiar with Agile structures, the business units had little prior experience and were confronted with a new way of working.

“[...] we had an entire IT division which had already decided two years earlier to become an Agile organisation. This forced the business to work with Agile teams, because the organisation itself was already structured in that way.”

To structure collaboration between IT and business on a large scale, the decision was made to rely on an existing framework on the market. External consultants promoted SAFe, the Scaled Agile Framework, as a ready-made solution introduced as a standard blueprint for Agile projects.

“We started with SAFe wording, because an external consultancy had sold it before internal colleagues came in.”

The design followed the specified structure in the SAFe framework. At the top, a portfolio level was established to provide overall direction. At the bottom, delivery was organised through Tribes and teams. Between these two layers, a solution level was introduced to act as a bridge between portfolio and delivery. The project gained traction, and the portfolio level attempted to gather and consolidate requirements from more than sixty countries.

“The portfolio level attempted to gather and consolidate requirements from all countries, but the portfolio had no real impact. It tried to collect requirements from all countries and break them down into a global standard.”

Over time, this setup created increasing friction. The portfolio level should have been able to prioritise across markets, decide which standards would apply globally, and determine where local customisation was acceptable. In practice, it lacked the authority to take binding decisions.

“We had not enabled the right people there to make decisions, and that slowed the process enormously.”

The absence of clear decision-making powers resulted in an excessive number of alignment meetings and delayed progress.

“We had an unbelievable amount of alignment meetings, and that simply did not fit the cycles we had defined.”

The solution level, intended to bridge portfolio and delivery, did not provide additional value. Instead, it created further complexity as there was no actual solution to justify this layer, and it functioned primarily as an additional management tier without real value.

“We had it on the wording, there was no solution, so the solution level was simply a middle-management layer in the way.”

These structural weaknesses triggered a turning point. The leadership team initiated a radical cut, restructuring teams and redefining how requirements were channelled.

“The problem was not development in the end; the problem was the alignment beforehand.”

Because of the problems experienced in the early phase, the Lean-Agile Centre of Excellence (LACE) was established as a new line function and began its work, providing methodological guidance and ensuring consistency across the programme. The SAFe layers were the first central measures to be addressed and were replaced by a new structure that clarified decision-making and delivery responsibilities. Instead of relying on portfolio and solution levels, the programme adopted a matrix organisation. Delivery was organised in Tribes, each of which was assigned a Board sponsor with formal decision-making authority.

“We organised a Board sponsor for each Tribe, who ultimately had decision-making authority.”

Below this level, so-called Epic Owners were introduced to consolidate and define requirements across countries. Their role addressed one of the weaknesses from the early phase, when requirements had been collected without sufficient authority and clarity. By acting as an interface between strategic direction and delivery, the Epic Owners ensured that inputs were gathered, prioritised and prepared for implementation in the Tribes.

“We still called them Epic Owners [...] they brought things together and defined the requirements.”

The LACE Strategic ensured alignment through a goal-setting approach and synchronised priorities across Tribes to create transparency about objectives and expected outcomes. This mechanism addressed one of the core problems from the early phase, when decisions had been delayed and clarity on priorities was lacking.

“[...] we set ourselves up in these ways to make sure the cascade worked and that we went entirely by strategic values.”

To support on an operational level, an Agile PMO was established. Its role extended beyond administration, as it maintained JIRA dashboards, configured reporting tools, and safeguarded data quality. The participant emphasised the importance of this function:

“They maintained JIRA dashboards, [...] created reports ... without data quality you cannot make things transparent. [...] Without [the Agile PMO] you have nothing; they are often the first to be cut, but they hold the whole thing together.”

The revised governance structures did not achieve full stability immediately. The redesign represented a fundamental change to the organisation. Although delivery capability for the project teams was established, the work was not without tension. Some roles were assigned twice, such as the product owner role, which was claimed by both IT and business. Responsibilities were not always clearly defined until the end, and resistance remained, as some managers were unwilling to give up established authority.

“Managers were reluctant to relinquish authority, and IT and business both tried to appoint product owners, which led to duplication and confusion.”

It took a considerable period until the new roles and processes were embedded and accepted across the programme.

“It took more than a year for the revised structures to stabilise.”

Over time, the revised structure enabled greater success in the delivery of the platform, providing evidence of its effectiveness despite the challenges faced. Even under pressure, delivery continued.

“The delivery was always good because it had to be “

Ultimately, the teams developed the capability to deliver reliably, and the platform expanded accordingly. Results were consistently achieved and reported as progress, even if they did not always represent the most appropriate solutions or generate full satisfaction among stakeholders. The ability to demonstrate continuous progress remained important, reflecting a pragmatic view that delivering outcomes with scope for refinement was more valuable than delivering nothing.

Were people satisfied? No. Was it necessarily the right thing? No. But it was always something that could be reported as going in the right direction.”

4.5.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

The transformation was neither quick nor easy. It took more than a year for the revised structures to stabilise, during which resistance was strong. Reflecting on these challenges, the participant stressed the importance of top-level guidance.

“If it doesn’t work at the top, it won’t work below.”

The experience showed that the challenges lay less in the framework itself than in the way it had been introduced within the organisation. He emphasised that governance could not be reduced to terminology or formal structures but required clear authority and consistent alignment at the top of the organisation. He stressed that the difficulties encountered were not a result of the framework itself but of the way it had been applied. This experience shaped his conviction that frameworks had to be meaningfully adapted to organisational realities rather than being followed superficially.

“It was not SAFe failing. It was the organisation that only did what was easy and ignored what was needed.”

Looking back, he also observed recurring behavioural patterns under pressure. In his view, the tendency to return to familiar practices was a significant risk for sustaining Agile Governance:

“When stress hits, people return to where they feel safe — even if that safety is an illusion.”

4.5.5 RESEARCHER COMMENT AND SUMMARY

The participant presented his narrative with notable authority and conviction, speaking for approximately 75 minutes. His account was structured around clear phases: the initial SAFe implementation, recognition of crisis and subsequent structural redesign. Although the participant held significant influence over the transformation, he positioned himself primarily as an observer of organisational dysfunction rather than as an actor within it.

In his consulting context, the researcher has often heard clients describe how frameworks were purchased with high expectations. In the researcher’s experience, scaled Agile frameworks rarely deliver the intended results in a straightforward way when they are introduced without sufficient organisational preparation and sold as ready-made solutions without further adaptation or continued support. Based on these experiences, the researcher approached the interview with critical awareness of framework-driven transformations and listened with particular attention to how SAFe had been introduced as a template and what this meant for governance and delivery capability.

Three patterns shaped the governance journey. First, the initial SAFe implementation, introduced as a consultant-driven template, did not align with the organisation. The failures were attributed to structural weaknesses and gaps in decision-making authority rather than to

methodological design. SAFe was perceived as inadequate not because of the framework itself, but because of its superficial adoption without organisational adaptation.

Second, the redesign replaced the SAFe layers with new governance structures centred on decision authority. Board sponsors were appointed to provide clear leadership, supported by Epic Owners who consolidated requirements across countries. The LACE was established as a line function to ensure methodological consistency, while an Agile PMO safeguarded transparency and data quality. These measures clarified responsibilities and created a more functional governance setup.

Third, delivery capability was underpinned by tools and data. JIRA and real-time reporting became central to governance, providing visibility across Tribes and enabling decisions to be based on reliable information. The Agile PMO ensured data quality and configured dashboards, creating the transparency that held the governance system together.

The narrative provided a rich account of the transformation, although several aspects were not discussed in detail. The participant explained that SAFe had been introduced by an external consultancy before internal staff became involved. While the narrative made clear that the SAFe implementation did not work as expected in practice, it did not provide detailed examples of critical situations that illustrated this failure, apart from references to excessive alignment meetings.

The narrative provides several insights that link directly to the research questions of this study. Governance roles only gained relevance once authority and responsibilities were clearly defined. Board sponsors assumed decision-making responsibility at Tribe level, Epic Owners consolidated requirements across countries, the LACE acted as a methodological line function, and the Agile PMO provided operational support and transparency (RQ1). These roles enacted governance through practices such as structured goal-setting cycles, the systematic use of JIRA dashboards and reporting tools, and a consistent focus on data quality to support reliable decision-making (RQ2). These roles and practices influenced project success by stabilising delivery capability. Although not every outcome fully met stakeholder expectations, results were delivered reliably, helping to keep scope and timelines under control while providing a basis for learning and further adjustment (RQ3).

4.6 FINANCE TRANSFORMATION: FROM GREENFIELD TO TOP-DOWN GOVERNANCE (PARTICIPANT 7)

This narrative examines a finance transformation that began with significant design freedom before shifting to heavy formalisation driven by budget pressure. Governance moved from light coordination to scope boards and top-down interventions that overruled Agile.

4.6.1 PARTICIPANT BACKGROUND

The interviewee began her career in consulting, focusing on IT transformations. After five years, she moved into an industry role in the finance sector. She initially started as a subject matter expert (SME) for finance processes in a major transformation programme and advanced quickly into broader responsibilities. In the line organisation, she took on leadership of a team, while in the project she was gradually promoted and became Project Manager, across finance areas and with steering bodies.

4.6.2 PROJECT AND ORGANISATIONAL CONTEXT

The project took place in a company within the IT industry that has been active in the market for more than two decades. Over time, the IT landscape had developed into a complex ecosystem due to both organic growth and acquisitions. More than one hundred individual applications were in use, overlapping in functionality and development independently of each other.

As a technology-driven enterprise, the company was particularly exposed to the pace of technological change. The need to modernise its IT architecture, reduce redundancies, and strengthen flexibility was a central driver behind the large-scale transformation project in which the participant was involved as finance transformation lead.

4.6.3 PROJECT GOVERNANCE JOURNEY

At the beginning there were hardly any architectural restrictions, and governance and methodology had to be set up within the project itself. The participant recalled the excitement of starting on what felt like a “greenfield.” There were hardly any architectural restrictions, and teams were free to design to-be solutions.

“We really defined processes and solutions on a greenfield.”

There was momentum to redesign processes at its core, not just replicate the old. Optimisation and transformation were the central focus. This freedom created strong motivation. The participant described this phase as highly engaging: roles were still fluid, governance was light, and steering structures were present but not dominant.

“At the beginning, there was freedom... the focus was really on transformation of processes and the organisation.”

The project initially gained momentum, and the team delivered the first components. But as the project progressed, budget pressure emerged. This pressure did not originate within the project itself, but management decisions introduced it in response to wider strategic considerations. The resulting budget cuts triggered the introduction of additional gates and coordination rounds, reinforcing formalisation and slowing delivery.

“With the budget pressure came all the additional gates and coordination rounds.”

A central gate was the scope board, which consisted of senior managers and acted as the decision-making body on what would be done in the project.

“We could earlier steer topics relatively easily into delivery planning – now you have to go through scope boards.”

This marked a shift away from the earlier freedom of planning. Instead, the participant filled out decision templates to provide information for steering bodies. The participant's frustration with this development became evident.

“I repeatedly had to prepare templates for the committees so that decisions could be made.”

Over time management influence increased. What began as a formal sign-off gradually turned into active intervention. The management overruled sprint planning and re-prioritised features outside the agreed governance.

“Sprint planning was crashed because features were re-prioritised by management decisions.”

This development progressed and the budget pressure increasingly determined the way of working. Agile routines such as daily stand-ups continued on team level, but their spirit was overshadowed by formal oversight.

“What stopped us from truly working in an Agile way was the increasing budget pressure.”

This marked a clear turning point: instead of transforming processes, the project increasingly focused on replicating legacy structures. Ambition declined, and the team adjusted its expectations accordingly.

"We became less ambitious over time... our goal shifted to having processes that are not worse than today."

What began as a transformation gradually turned into damage limitation. Step by step, the project became more formalised, and even minor conflicts resulted in escalations that ended up in a newly introduced board chaired by the IT Director.

"The [...] Steering Board, chaired by the IT Director, was the central body for escalations."

Progress in this setting was often slow, and the project team was hardly able to act independently any longer. The participant noted the importance of informal escalation through her top management, which at times was the only way to move issues forward.

"I often realised I could not progress through official governance channels, so I had to involve someone with organisational standing."

Day-to-day work was now dominated by governance-driven meetings, running in parallel to leadership duties, team management, and subject-matter tasks. Dailies, steering sessions, business readiness reviews, and alignment calls filled most of the participant's schedule.

"My day was 95% meetings..."

The project ambition, once set on process optimisation, had been scaled back to the minimum goal of stability, ensuring that processes on the new system were, at least, not worse than before. The management brought the project to an end and launched several new initiatives that are expected to run until 2030. The outlook was marked by pragmatism rather than optimism, a contrast to the early greenfield excitement.

"I expect this to run until 2030."

4.6.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

The participant explained that governance increased over time and became heavier as the project grew in importance. What began with lighter arrangements was replaced by more formal steps as the project advanced.

“Governance got bigger the more critical the project became.”

Although Agile routines such as daily stand-ups and programme increments to determine planning cycles were in place, decisions were made or changed outside of these forums.

“Sprint planning was crashed because features were re-prioritised by management decisions.”

She summarised the balance between agility and governance in a single observation.

“It is difficult to run a project 100% Agile. What is important is having the governance to steer it properly.”

Finally, she added that a project of this scale should also pay attention to organisational change. The absence of change management was seen as one of the reasons why the project did not achieve its initial goals.

“Change management was virtually non-existent in the project.”

4.6.5 RESEARCHER COMMENT AND SUMMARY

The interview lasted one hour and followed a clear narrative flow. The participant began with the early set-up and moved step by step through later phases marked by growing formalisation and restrictions. The account was structured and chronological, with references to governance mechanisms such as gates, scope boards, and steering bodies. The tone was factual, and the participant's energy was notably high when recalling the early phase, but her voice became increasingly resigned as the interview progressed.

The narrative becoming more open and emotional as it progressed and created a strong sense of recognition for the researcher. The ambition at the greenfield stage was tangible and easy to relate to, as was the later decline in motivation when management increasingly intervened. These emotions were familiar to the researcher from previous projects and experiences, which led to a conscious decision to hold back with probing questions so as not to place too much emphasis to the project's failure or to reinforce the participant's frustration.

Three patterns stood out in this narrative. First, the participant's language revealed a governance transformation: early descriptions centred on “greenfield” and “freedom to design,” while later phases were dominated by “gates,” and “templates for committees”. The term “crashed” was used specifically for management interventions.

Second, budget pressure acted less as an initial trigger and more as a reinforcing factor. It accelerated the introduction of controls, lengthened testing and defect resolution, and increased management influence on planning. Under these conditions, prioritisation was frequently adjusted outside the agreed routines.

Third, the absence of structured change management stood out. The project began in a flexible manner and change management was not considered from the outset. In retrospect, it could have provided orientation and alignment, particularly since Agile methods had to be applied in a complex environment where organisational experience was limited.

The narrative gave a detailed account of the governance journey, with emphasis on the shift from early freedom to later formalisation. The main emphasis lay on escalation and decision-making. Therefore, triggers for the budget cuts were not explored yet focusing more on their effects within the project. The interactions between governance roles such as Tribes, Alliances, and the Core Team Steering were mentioned, but not discussed in detail.

The narrative provides several insights that directly link to the research questions of this study. Governance roles expanded as the project advanced and became more formalised. The Project Manager for Finance Content coordinated across finance areas and prepared decision templates, while Tribes and Alliances shaped delivery prioritisation. The Core Team Steering, chaired by the IT Director, acted as the main escalation body, while the Head of Transformation exerted influence through informal authority (RQ1). These roles carried out governance through practices such as preparing templates for decision-making, using scope boards as a central gate for planning, daily stand-ups and steering sessions, and escalation management through formal and informal channels (RQ2). Together, these roles and practices influenced project success by slowing delivery, reducing scope through repeated cuts, and weakening motivation. While some outcomes were delivered, budget pressure and the absence of structured change management undermined ambition, leaving the project close to termination and limiting opportunities for sustainable learning (RQ3).

4.7 SALES 2.0: PEOPLE-CENTRED GOVERNANCE (PARTICIPANT 8)

This story focuses on a transformation in a highly regulated corporate environment where formal governance structures were minimal. Governance emerged through vision setting, stakeholder alignment, and trusted delivery.

4.7.1 PARTICIPANT BACKGROUND

The interviewee is a senior consulting executive and transformation lead with a professional background spanning strategy, coaching, and programme delivery. She developed innovative B2C customer strategies and held leadership roles in dynamic technology driven organisations. She currently works in a large, highly regulated corporate environment. She made it clear that she had never seen herself as a traditional project manager. Instead, she positions herself as someone who defines frameworks and creates cultural conditions for transformation.

“I am no classical project manager. I am a strategist, a consultant, a director – and I never stuck to a rigid framework. If someone gave me one, I broke it, because it was not good”

Her project approach is consistently people-centred. At the beginning of an assignment, she invests time in understanding team dynamics, conducting individual and group conversations, and applying coaching tools. This allows her to uncover strengths and expertise that are often not visible in formal job descriptions. She explained that her starting point is to look beyond what is written.

“I look at the people first. Who has which strengths? Not the ones on paper, but the ones they live and bring to the project.”

4.7.2 PROJECT AND ORGANISATIONAL CONTEXT

Her current project, which she described as the most complex and exciting of her career, aimed to establish effective adoption of a global cloud-based sales system across business units. Although her role carried the broad title of “Sales 2.0”, she was neither introduced to stakeholders nor provided with a clear mandate. In practice, this meant she had to define her own scope, which initially led to uncertainty.

As she became more familiar with the environment, she discovered that the real challenge was not technical but cultural. Entrenched silos, territorial thinking and diverging interests dominated the organisation. These tensions shaped her understanding of the project and the cultural challenges she faces.

“I had the culture clash of my life.”

4.7.3 PROJECT GOVERNANCE JOURNEY

Immediately after starting her new role, she embarked on the transformation and held meetings with the board to clarify her responsibilities. Yet these discussions did not provide the clarity she had hoped for regarding her role or the criteria by which she would be evaluated. Instead, the organisation confronted her with ambiguity.

“They put me in a virtual world and said: this is your task. But nobody really explained what it meant.”

From the beginning, the participant focused on people and relationships rather than processes or structures. She invested time in one-to-one conversations and group observations. In parallel, she mapped the organisational environment, identifying support and resistance. With no formal mandate to rely on, she had to construct her own vision and strategy. While this process was demanding and at times frustrating, she acknowledged that the absence of rigid structures gave her the freedom to design her own path.

“In hindsight it was painful, but I am grateful because I could define my own vision, my own strategy, and build up the team accordingly.”

She encountered not only ambiguity but also active resistance. Stakeholders positioned themselves defensively, fearing change and questioning her role. She described how she had to fight for every piece of information, realising that progress could not be made without first addressing this opposition.

“I felt the fiefdoms, that was very striking, and I also experienced the culture clash of my life.”

As she became more familiar with the organisational culture, she recognised that resistance was not only structural but deeply rooted in attitudes towards change. The environment was highly regulated and risk-averse, with stakeholders prioritising stability over experimentation. She described how this defensive stance often blocked progress and created an atmosphere of fear rather than openness.

“They do not want to change anything, please do not touch anything, it could break.”

A decisive moment came when she reframed the project and shifted away from its focus on the system and repositioned it as a cultural transformation. To gain traction, she adopted the role of an internal salesperson, presenting a compelling vision that secured the backing of senior leaders.

“I gave them a big vision and sold it to them internally, and that was the moment when I got the senior leadership team on board.”

As the programme advanced, she introduced routines that combined formal and pragmatic elements. She divided the work into streams, established Kanban for transparency, and implemented Objectives and Key Results (OKRs) to create rhythm and focus within her team. Through these practices, she made her group one of the best-performing teams in the organisation.

“We have been working with OKRs for one and a half years now, and I think it is the best leadership tool ever. Everyone takes their objectives, and it works well.”

Her approach contrasted with other teams, which formally adopted frameworks such as the Scaled Agile Framework (SAFe). While the conceptual understanding was present, bringing such global frameworks to life in day-to-day practice proved to be the real challenge. She observed that Agile rituals in those teams often lacked substance and became hollow routines.

“Retrospectives become just a label.”

Over time, her consistent delivery-built trust and reduced the need for formal approvals. What had once required detailed scrutiny at steering committees became a lighter annual sign-off process, supported by confidence in her team’s reliability.

“Because we delivered so many success stories, we no longer need to get approvals for every OKR. Once a year the roadmap is signed off, and then we run autonomously.”

Her consistent delivery and the visible success of her team did not go unnoticed. Over time, the organisation and other project teams in the transformation recognised their performance and asked her to extend her approach beyond the immediate project. Teams outside the project invited her to introduce her tools and methods. She described these moments as both recognition and validation of her practices.

“I was asked to bring this way of working into the larger team because we were moving things forward so quickly.”

4.7.4 RESEARCHER COMMENT AND SUMMARY

The interview lasted approximately 65 minutes and was characterised by dynamic, passionate narration. The participant spoke with notable energy when describing cultural conflicts. Her narrative style was non-linear, moving between strategic reflections and concrete examples, often highlighting the theme of people and culture. The tone shifted from frustration when recalling initial ambiguity to pride when describing achievements.

The researcher's own background is in managing projects with a stronger reliance on methods and structured approaches. By contrast, the participant described an environment where formal governance mechanisms were weak, and where her practice centred on people, culture and trust. This contrast made the interview particularly instructive. It showed how governance can emerge without being driven by methods, but instead through persuasion, coaching and relationship-building. For this reason, the conversation was not steered back towards processes or structures but allowed the people-centred perspective to fully unfold.

Two observations stood out. First, the participant mentioned board-level checkpoints but emphasised repeatedly how she filled the governance vacuum herself. Formal governance was largely limited to reporting routines and resource approvals at board level. Beyond these checkpoints, there was little structure in place, leaving space that she actively occupied.

Second, the absence of a formal mandate became both challenge and opportunity. With no clear guidance, she was forced to establish her own legitimacy, building a vision and strategy that gave the project direction. She described this experience as painful at the time, but one that later made her grateful for the freedom it created.

However, some aspects of governance could not be explored in depth. It remained open why the participant's role was never formally defined, or why a transformation of such strategic relevance was initiated without a clear mandate or evaluation criteria. While the narrative highlighted how trust and autonomy replaced more traditional structures, the reasons for this set-up were not elaborated further.

The narrative shows how governance in this case emerged in a context of limited formal structure, relying on board-level approvals, while the project lead filled gaps through vision, stakeholder alignment and the introduction of simple, visible routines on team level.

Regarding the research questions, it can therefore be concluded that senior leadership validated the annual roadmap and approved budget where necessary. An expert committee, convened quarterly, provided input and challenge from core business stakeholders. The

participant herself took responsibility for creating direction, building the team, and operating governance at the delivery level. Teams became self-organising units, working within OKRs and using Kanban for coordination and transparency (RQ1).

The project was governed through quarterly Expert Committees (advisory), quarterly Steering Committees (reporting and budget decisions), and annual leadership signoffs. At team level, OKRs provided structure and accountability, while Kanban created visibility and prioritisation. These practices replaced more traditional approval gates and enabled progress to be demonstrated continuously (RQ2).

By demonstrating results and establishing transparency, the team reduced the need for frequent approvals. The participant described her team as one of the best performing in the organisation, and the organisation later asked her to extend her model within the organisation to other teams, which indicates high recognition for the delivery capability (RQ3).

4.8 DIGITAL PRODUCT DELIVERY: ADDRESSING ADDITION BIAS (PARTICIPANT 9)

This narrative explores an organisation-wide Agile roll-out that produced friction through uniform rules and significant overhead, while Governance evolved towards a principle-based approach.

4.8.1 PARTICIPANT BACKGROUND

The participant has extensive experience in Agile environments. He began his career as a project manager in logistics and operations, where he managed numerous Agile and hybrid projects and supported Agile teams over several years. During this time, he discovered his passion for providing trainings, which soon became highly requested across the company. After several years in this capacity, he transitioned to the financial services sector, where he now holds a permanent role applying his expertise in Agile coaching to organisational practice. Looking back at his development, he described how his role had shifted from training individuals to designing systems.

4.8.2 PROJECT AND ORGANISATIONAL CONTEXT

At his current employer, the participant experienced how the organisation faced increasing complexity in delivering its products. As these products were provided digitally, solid IT capabilities had become critical to business success. In response, the organisation launched a transformation to reduce complexity and optimise structures.

Each year multiple initiatives were launched, prioritised and aligned with organisational goals. These initiatives demanded contributions from teams across the IT landscape. However, the main challenge was not the formation of Agile teams but ensuring that they interacted effectively across shared dependencies.

4.8.3 PROJECT GOVERNANCE JOURNEY

A few years ago, a new board took office and placed agility high on the agenda. Drawing on positive experiences, they decided that Agile frameworks such as Scrum should be introduced across all teams. This introduction became almost a project in its own, running alongside the wider transformation of the organisation. At its core, the transformation aimed to shape structures and processes in the insurance business so that operations remained both compliant with regulatory requirements and competitive in the market.

“One reason for the transformation was that someone at the top changed and said: I had positive experiences with Scrum at previous company and now all teams here should work that way.”

What followed was a rapid, almost indiscriminate roll-out. Agile was applied everywhere, regardless of context, which created friction and confusion.

“It was almost like a watering-can principle.”

This pattern was something he had often observed throughout his career, and it was also evident in his current organisation. While individual teams adapted to Agile routines, integration across the wider structure lagged. Dependencies accumulated as several teams drew on the same resources, test cycles stalled when prerequisite test data was missing, and coordination across units became slow. Instead of accelerating delivery, the setup led to bottlenecks and recurring friction in everyday work.

“The big challenge is not setting up Agile teams, but the interaction between them – that the right team does the right thing at the right time.”

In addition to these internal factors, external factors such as regulatory requirements had a direct influence on the governance and project delivery. In highly regulated industries like finance and insurance, compliance with supervisory authorities was mandatory and had to be built into governance structures, irrespective of whether it fitted with Agile principles.

“In highly regulated domains, you must meet regulatory requirements - you can’t ignore them.”

Two major steering processes structured the work on transformation level: an annual portfolio prioritisation and a planning cycle during the year. Each initiative demanded artefacts such as requirements descriptions and economic calculations.

“You have to sketch what the initiative should achieve [...]”

However, the participant repeatedly observed that initiatives were often launched without proper validation. The organisation skipped proof of concepts in favour of immediate delivery. This left teams uncertain about viability from the very beginning, a practice he saw as deeply problematic.

“It always means let’s get going ... and then they don’t know what to do and get lost in a direction.”

Intended to give teams greater clarity, the organisation introduced a checklist known as the “Definition of Ready” to determine when a requirement could be regarded as ready for implementation. In practice, however, it increased the workload and offered little benefit. One product owner gave feedback to the participant, that he had followed the rule exactly as required, yet it had not helped his team at all.

“I did it exactly as you wanted – but it didn’t help me.”

This feedback led the participant to reflect more broadly on patterns he had seen throughout his career. Prescribed checklists were only one example in this transformation in which uniform rules added effort without delivering real value. He realised that new processes and obligations were constantly being added, while outdated ones were rarely removed. For him, this was the essence of a recurring problem: instead of creating agility, organisations weighed themselves down with rules and routines that offered little value and made them increasingly rigid.

“Organisations calcify because new things are always added and rarely anything is abolished.”

In response, the organisation abandoned the Definition of Ready checklists and moved to principle-based guidance. Instead of dictating formats and criteria, the instruction was simplified to one principle: create clarity with stakeholders. The way teams achieved this clarity was left to their own judgement.

“Our description is: create clarity with the stakeholders – how they achieve it is up to them.”

The introduction of principles became tangible in day-to-day work. Where long, standardised checklists had previously delayed the start of work, teams could now agree on clarity in a form that suited their context – sometimes in three bullet points, sometimes in detailed acceptance criteria. Governance became lighter and more adaptive, while still retaining essential checkpoints. Quarterly business reviews with the board provided forums to address obstacles and make decisions.

“There are still checkpoints, but not everything is centrally steered.”

The principle-based way of working was gradually taken up by the board itself. Quarterly reviews with the board provided a forum to address obstacles and make decisions. Over time this practice also changed. The board acknowledged that it did not need to be present in every meeting, giving space for Directors to align independently.

“They also said we don’t actually need to be everywhere ... we don’t need to be present in every meeting.”

4.8.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

The participant recalled, in earlier roles, he had been known for delivering Agile trainings that were popular. Teams appreciated the workshops and often praised the content, but once they returned to their day-to-day work, they returned to established routines. For him this underlined a recurring lesson: without changes to structures and governance, organisational behaviour remained the same.

“At the end of such a training people said: wonderful content ... but afterwards they fall back into their old structures.”

Governance, in his view, requires an environment of learning, reflection and adaptation, creating conditions in which teams can deliver effectively while governance provides only as much direction as needed to keep the organisation aligned.

“It needs an environment of learning, reflecting, adapting and trying things out – not just at team level but as part of the organisational DNA.”

4.8.5 RESEARCHER COMMENT AND SUMMARY

The interview lasted approximately 70 minutes and was characterised by a reflective and analytical tone. The participant spoke with the clarity of an educator, often using metaphors and conceptual frameworks to illustrate his points. His language was vivid: he described an indiscriminate Agile roll-out as a “watering-can principle” and warned that “organisations calcify” when new rules are added without abolishing outdated ones. His energy rose when he explained the move towards principle-based working, in contrast to visible frustration when recalling the product owner’s remark: “I did it exactly as you wanted – but it didn’t help me.”

At the outset, the researcher was both sceptical and curious upon learning that the initiative had been driven by management. Previous experience had shown that such efforts often resulted in a superficial adoption of Agile methods, which raised doubts about whether agility was genuinely lived or merely applied as a label. During this narrative it became clear that this narrative was different. A committed board member introduced Agile methods and remained present, giving direction and credibility to the transformation.

Three points stood out in this narrative. First, external requirements were presented as non-negotiable. In the heavily regulated environment of insurance and finance, compliance with supervisory authorities had to be integrated into governance. Agile working could not bypass these conditions. Instead, ways of working had to align with them.

Second, the participant emphasised that whenever new processes were introduced, existing ones needed to be questioned, and current practices examined whether they still provided value for the teams. Otherwise, more broadly, the governance tended to accumulate, becoming more complex. The Definition of Ready was one example where uniform checklists added effort without supporting delivery.

Third, prescribed checklists such as the Definition of Ready increased the workload without supporting delivery. In response, the organisation shifted to principles. This gave teams freedom to adapt the practice to their own context, while governance retained oversight through reviews and checkpoints.

A few aspects could not be discussed in full detail. The focus was on understanding how governance functioned, while ways of working at project or initiative level were not explored in depth as well as the content of individual initiatives. As the emphasis was also placed on the overall transformation, the specific nature of some of the multiple initiatives and how they were governed beyond the annual portfolio process was not detailed.

The narrative provides several insights that link directly to the research questions. Governance roles appeared at multiple levels. The board acted not only as decision-maker in quarterly reviews but also as sponsor of the transformation, giving direction and visible support. Directors coordinated across teams and worked with the board to resolve dependencies. Product Owners managed stakeholder clarity and influenced governance through their feedback (RQ1).

Governance practices shifted to principle-based guidance, while Portfolio prioritisation and quarterly reviews provided consistency. Teams gained autonomy in deciding how to implement (RQ2). The governance evolution influenced delivery by first slowing progress through rules and later enabling outcomes through principled autonomy. The participant's observation that training without structural change fails reinforced the view that success depends on systemic rather than individual interventions (RQ3).

4.9 NEW TECHNOLOGY STACK: GOVERNANCE AND VENDOR INFLUENCE (PARTICIPANT 10)

This restory outlines a large-scale technology migration dominated by coordination gaps, vendor influence and escalating governance layers. Governance became increasingly centralised as quality issues impacted the roadmap, leading to crisis-driven decision-making.

4.9.1 PARTICIPANT BACKGROUND

The participant has a background in finance, accounting and governance. After his initial professional experience, he moved into consulting, where he became involved in numerous transformation programmes. In these assignments he repeatedly took over project management and PMO positions. Over time, he gained extensive experience in the financial services sector, complemented by assignments in the telecommunications and media industries. He was engaged in this programme as an external consultant, focusing on coordination and communication across multiple workstreams.

4.9.2 PROJECT AND ORGANISATIONAL CONTEXT

The project took place in the media and telecommunications industry and formed part of a large-scale transformation programme. Its purpose was to migrate core products from a legacy technology stack to a new platform. The team began with one product segment and subsequently extended to other services.

The programme was not only a technical migration but also expected to deliver broader transformation goals. Management communicated ambitions such as improved customer satisfaction, reduced costs, greater efficiency in operations and a faster time-to-market. These objectives were intended to justify the scale of investment and to demonstrate clear benefits compared with the legacy environment.

4.9.3 PROJECT GOVERNANCE JOURNEY

The participant joined the programme at a point when the product migration was nearing completion and the focus moved towards postpaid and other product lines. His position was to function as a project manager and coordinate between business requirements, planning activities and delivery structures. He described this as a role of mediation rather than decision-making.

“I was responsible for one of these functional areas... mainly [...] in the whole coordination tasks, the hub through which communication flowed.”

Early on, he noticed a lack of effective interaction between the different levels of the programme. A governance body existed but remained detached from the work of planning and delivery project teams. The absence of such connections left coordination largely in the hands of intermediaries like himself.

“There was a governance body above, but it did not ensure that those at the working level really communicated with each other.”

As an example of the demanding planning process, the participant pointed to the silo mentality of the product teams. Each owner concentrated on the scope of their own product line. Demands affecting all products, such as finance-related topics like invoicing, were not considered, and coordination was needed to ensure that the teams could address them collectively.

“Before that, the owners only looked at their [...] scope, which meant that cross-functional topics such as finance were repeatedly postponed.”

The involvement of a central vendor for the software delivery added further complexity. Although formally part of the programme, they were free to decide how delivery would be organised.

“The vendors could choose the delivery train and the delivery vehicle, and that led to tensions when the vendor who gets paid for the project also decides how he delivers.”

The project lasted over two years and friction regarding the quality increased. The vendor often did not provide software as expected. When shortcomings were identified during the testing cycles and marked as defects, the vendor started reframing these as missing requirements.

“Frequently topics were not delivered as needed... and when defects were raised, they were quickly pushed back as ‘you did not request it that way’, turning them into additional features.”

The discussions intensified at every level, from planning to requirements and delivery, and conflicts intensified. The quality issues had a particular impact on planning, which was already highly coordination intensive.

“There were no placeholders in the delivery for requirement gaps. It was hard planned that every delivered feature was fully functional and did not need to be touched again.”

By reframing defects as new requirements, the vendor ensured that these items entered the roadmap as additional placeholder features. This displaced other planned requirements and further strained the already limited capacity. It became clear that the roadmap could no longer be sustained with the existing resources.

“That then further delayed the roadmap, although these topics had not really been planned for in the roadmap.”

Top management as the sponsor intervened and made a far-reaching decision. The causes were attributed to the way teams worked, the heavy coordination effort between them and the recurring quality issues. The sponsor established the Planning and Scoping Team as new governance actor to take over central responsibility for planning.

“There was the so-called Planning and Scoping Team. That is what was introduced to make planning leaner, to enable planning with five different product lines.”

After several months, it became clear, that the new governance team did not improve the situation or stabilise the roadmap. The participant recalled that the Planning and Scoping Team remained distant from both the product teams and the vendor. This meant that quality problems and the reframing as new requirement were neither properly recognised nor communicated to the top management.

“The Planning and Scoping Team had too little connection with the delivery vehicles. It was too far away from the blueprinting teams... either too many layers, or layers with the wrong priorities, so that the poor delivery quality never really reached top management.”

With each subsequent delivery in every product increment, an increasing number of features, which were in fact quality issues, accumulated and landed on the Planning and Scoping Team. They also recognised, that the problems intensified that even the project budget was at risk.

“They then quickly realised that the project budget would burst. “

Top management then decided to take direct control of the roadmap. They determined what had to be delivered, and when, in which product increment (PI), leaving the planning of the product teams and the Planning and Scoping Team with little influence.

“A top-down cut was made, and it was said you now have until this PI and must reduce the features. “

Although the introduction of a predefined scope by top management might suggest greater stability, the roadmap did not provide the expected predictability. As a result, conflicts over priorities escalated further.

“It was rather back and forth... the constancy in the project through the concept of fixed PIs, of fixed scope, which then repeatedly slipped and did not work.”

From that point, the transformation was characterised by short-term crisis responses, and the organisation shifted into temporary escalation mode. The participant observed that this brought temporary relief but did not alter the underlying main cause.

“They switched to task-force mode. A single problem was solved quickly, but only that one problem.”

The project continued in this mode for more than a year. During this time, milestones were reached and the migration to the new system was carried out. Looking back, the participant described the project outcome as mixed. Migration and product launches were achieved, yet the broader transformation goals such as customer satisfaction and faster time-to-market were missed.

“A success in terms of migration and launches, yes. A success in terms of the original project goals... no.”

4.9.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

The participant's view of governance shifted noticeably over the course of the project. Initially, the introduction of a governance board was perceived as a step towards reducing bias and improving prioritisation across product lines.

“That was a very interesting thing, how such a governance board was introduced in a running project, to decide which topics should be prioritised and how these heterogeneous product lines should play together.”

At first, the Planning and Scoping Team was therefore regarded as a potential improvement. It was expected to reduce silo thinking and to ensure that cross-functional requirements were no longer sidelined in favour of product-specific interests.

“Yeah, there was the so-called Planning and Scoping Team. That is what was introduced to make planning leaner, to enable planning with five different product lines.”

Over time, however, it became clear to the participant that introducing another governance function is only effective if it is well integrated into the existing structures. In this case, the planning team remained too distant from delivery and therefore lacked the ability to escalate problems effectively.

“The Planning and Scoping Team had too little connection with the delivery vehicles. It was too far away from the blueprinting teams. The epics and features lay with client staff or externals. The Planning and Scoping Team was too far from delivery to take such topics into account and to escalate them to management.”

He also noted that the governance structure, with its multiple layers, created additional barriers. Either there were too many levels or priorities were misaligned, with the result that known problems in delivery quality did not reach top management.

“Either there were too many levels, or levels with the wrong priorities, so that the poor delivery quality never really reached top management.”

4.9.5 RESEARCHER COMMENT AND SUMMARY

The interview lasted approximately 75 minutes. The participant maintained a measured, analytical tone throughout, with no dramatic shifts in emotion. He used precise terminology from both consulting and governance domains, while his most animated moments came when describing vendor behaviour, particularly the reframing of defects as requirements. The phrase “you did not request it that way” was delivered with audible irony. Unlike other narratives, this narrative contained no explicit positive turning point, instead the participant framed it as a story of “continuous decline”.

At the beginning, it was familiar that complex transformations with many teams create significant complexity in the prioritisation of requirements in the experience of the researcher. However, as the journey unfolded, the sense of recognition turned into unease. The researcher was both shocked by the course of the project and grateful for the participant’s openness in describing it. The focus was therefore on the course of the project and its consequences rather than on forcing any kind of turning points in the narrative.

Three thematic patterns characterised this narrative. First, governance grew more complex by both functions and practices whenever crises emerged. Additional functions such as the Planning and Scoping Team were introduced, and task forces were set up to address urgent issues. While these measures offered short-term solutions, they did not resolve the structural problems in planning and vendor accountability.

Second, governance roles existed primarily for coordination but without real decision-making authority. The top management centralised decision rights, leaving coordinators such as the participant or the Planning and Scoping Team with only the ability to prepare decisions rather than make them.

Third, the vendor’s ability to reframe defects as requirements emerged as the decisive governance failure. The phrase “turning them into additional features” revealed how

contractual foundations overpower governance, displacing planned work and ultimately undermining the roadmap. The participant's language suggested resignation to this dynamic as structural issue.

Due to the focus of this narrative story, some aspects were not explored in depth. The collaboration with the vendor was described as problematic, particularly in relation to the reframing of quality issues as requirements and the ability to influence delivery priorities. However, the reasons for the decision to select this vendor, as well as the contractual details and the agreed collaboration models, could not be examined further. It also became clear that top management was able to carry out significant influence and intervened directly at several points, for example by enforcing top-down cuts and taking control of the roadmap. What remains less clear is why, despite this authority, no sustained corrective action was taken to address the recurring delivery problems.

The narrative provides several insights relevant to the research questions of this study. Governance roles were shaped by strong centralisation of decision-making. The participant shaped his project manager role as a coordinator without authority, and the Planning and Scoping Team as a body that could prepare but not decide. By contrast, top management acted as the decisive governance body. Vendors also took an influential position by controlling how delivery was organised, effectively establishing their own form of governance alongside the formal structure (RQ1).

Governance practices evolved through interventions that reinforced the central role of management as decision-making body. Initial planning by brand owners was replaced by the centralised Planning and Scoping Team. Decisions on scope and timelines were increasingly taken at the top, while operational practices such as task forces managed short-term crises. This dynamic reduced the autonomy of other governance roles and further concentrated authority in management (RQ2).

The governance approach, dominated by management as the decision-making authority, ultimately undermined the transformation objectives. Over more than a year, migrations were completed and brands launched, but the broader goals of improved customer satisfaction and faster time-to-market were not achieved (RQ3).

4.10 DATA WAREHOUSE INTEGRATION: GOVERNANCE TENSIONS AND A PROTECTIVE LAYER (PARTICIPANT 11)

This case explores a data warehouse programme where management expectations, conflicting incentives and weak structures made a protective delivery layer necessary.

4.10.1 PARTICIPANT BACKGROUND

The participant is a founder and managing director of a medium sized consulting company, specialised in Agile project management consulting. Before starting his own business, he acted as a project manager who has led Agile, hybrid and classical initiatives across industries such as insurance and telecommunications. At the time of the described case, he was employed by a consulting firm, where he managed large-scale data projects and frequently took responsibility for stabilising distressed programmes.

4.10.2 PROJECT AND ORGANISATIONAL CONTEXT

The project was conducted at a Germany-based IT service provider that aimed to implement a new data warehouse system. The goal was to enhance reporting and analytics capabilities and to support the business in a highly dynamic environment. The contract was awarded to the participant's former employer, which provided a team of ten consultants. The client supplemented this team with 15 internal specialists from its data warehouse division, resulting in a joint project team of twenty-five members. The initiative was introduced as an Agile project by the consulting firm, which sparked the client's management's curiosity.

4.10.3 PROJECT GOVERNANCE JOURNEY

The participant initially observed the project and heard about it from colleagues at his employer. He did not take an active role until several months later, when his manager assigned him to support colleagues already involved in the project where the client had become dissatisfied and the situation had reached a critical state.

"I joined as a firefighter. The project stood on red."

The initial set-up, driven by an Agile coach, had attempted to connect Scrum practices with management's desire for tight control. This led, for example, to the creation of a single Scrum team of more than twenty people, which went against basic Agile principles. The approach quickly proved problematic.

"Before me an Agile coach tried to connect Agile methods and management requirements, which led to a pretty strong clash."

At the time of his arrival, the project team was paralysed. Instead of delivering increments, developers spent much of their capacity on reporting obligations that neither advanced the product nor satisfied the client. The participant recalled noticing how team members struggled with questions that were unrelated to progress.

“They were only occupied with reporting and quite absurd tasks, like why they had brought in so many story points.”

His initial analysis focused on damage limitation: to re-establish workable structures and optimise the methodology so that the team could focus on delivering the product rather than on reporting.

“...and I then tried to straighten out the Agile method while at the same time satisfying management. With the deliverables we produced, with the reporting, with the budget tracking and so on.”

Nevertheless, the contractual framework intensified the conflict. The vendor’s compensation was tied to story points, which are meant to reflect complexity. In this case, however, compromised estimation practices created suspicion between client and vendor. This arrangement effectively produced a conflict of interest: either optimise revenue in the sense of the employer or contain costs for the client. Developers felt pressured to inflate estimates, while management interpreted story points as a direct measure of value delivered.

“A big stumbling block in governance was billing based on story points... the more story points you set in poker, the more we earn – and that was of course absolutely absurd.”

The participant identified this way of estimation as one source of conflict and therefore aimed to negotiate a new contract. After lengthy discussions, he and the client agreed to replace story-point remuneration with a time-and-material model, which relieved pressure from the teams and restored transparency based on clear units. Meanwhile, he reorganised the oversized team into two Scrum teams, each of ten members, re-establishing a clear structure of Agile ceremonies.

“We split the team and returned to time and material. That already took a lot of stress away from the teams.”

With this turning point, the project entered a new phase. The participant positioned himself as the central interface between the teams and the management board. While the developers worked according to Scrum, as prescribed by methodology, he took responsibility for budget tracking, client communication, and the establishment of a roadmap designed to convey planning and provide reassurance to the client. This shielded the teams from additional reporting demands, and he described this role as project lead.

“We really introduced textbook Scrum... I managed the roadmap and the budget with stakeholders without bothering the teams.”

Despite the structural optimisation, tensions with the client continued. Management expected rapid delivery of visible business value, while the teams required time to build a solid foundation in the data layers. The mismatch became evident in sprint reviews, where small incremental improvements to reports, delivered in parallel with the construction of the foundation, did not match the progress that management and stakeholders anticipated. Instead, management and stakeholders, including the CTO, expected complex functions and advanced reports to be available right from the start.

“The customer wanted the golden taps first, while we needed five sprints for the foundation and another five for standard reporting. That regularly led to escalations with the CTO.”

However, the calm in the project did not last long. Escalations became more frequent and reached senior stakeholders. The participant recalled how missed expectations were repeatedly raised in discussions, even though a roadmap had been agreed. These moments highlighted the clash between contractual boundaries, the Agile way of working, and the technical realities of the technical product.

“This, of course, led to very frequent escalation meetings, where it was necessary to make everything transparent.”

Despite the client's dissatisfaction, the project continued. The project team made progress constantly visible through consistent demos and weekly reporting and gradually regained the management's trust. While the early demonstrations had little to offer due to the focus on building the foundation, the progressive enrichment of reporting functions convinced management that the teams were moving in the right direction.

“At the beginning demos were very poor, but later we could show that reporting improved and even gave sneak peeks from the backlog.”

The project lasted for two years. The dual-team set-up, the governance arrangements, and the participant's intermediary role towards management were maintained until completion. The management reallocated resources between the data-layer and reporting as priorities evolved. In the end, the project was completed successfully and delivered the outcomes according to the contract.

“The overall project duration was two years. I joined after the first six months and remained for a further one and a half years. I was on site throughout that entire period and brought the project to completion.”

4.10.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

In reflecting on governance, the participant emphasised firstly the necessity of secured funding. He described how Agile teams require committed resources, rather than being pulled back into their functional departments.

“...the first point is clear funding. I have at times experienced that in Agile teams, which are organised in an interdisciplinary way, there were repeated attempts to pull resources back into their original departments. I have seen that quite often.”

The participant assigned a particular significance to communication as a key learning from this project. He underlined the need for transparent communication structures, especially to prevent managers or business units from bypassing the agreed Scrum roles. This protection would allow the teams to concentrate on their work rather than spending their time converting technical details into management-friendly status updates.

“There must be clear communication guidelines... you need to know who to approach with which issues.”

Finally, he highlighted the importance of scope stability in the short term, even within an Agile approach. He stressed that this stability must be preserved as far as possible, even when dissatisfaction arises. Once the team has committed to a two-week delivery, all parties are expected to adhere to this agreement.

“We agreed in a ceremony what we would deliver in two weeks, and within that time it remains stable.”

In addition to stable processes, clear structures and methodological discipline, the participant stressed that trust was equally essential. In projects with strong technical dependencies, a solid foundation must first be established before new functions can be delivered step by step. Trust therefore became the bridge between management's immediate expectations and the reality of incremental delivery.

“...over time we built trust by running regular demos, also for management. The first demos, as I mentioned, were very poor, because their expectations were different. But by repeatedly showing that we were building on the foundation and by demonstrating after each sprint that the reporting improved, looked better, and could already do more, we eventually reassured management.”

Based on these experiences, he adjusted his practice in subsequent projects of his company. He now emphasises stakeholder alignment at the start and maintains weekly reporting for management in classical formats.

“Agility means we deliver iteratively, but this must be communicated clearly... everyone understands a milestone, but not necessarily an epic or feature.”

4.10.5 RESEARCHER COMMENT AND SUMMARY

The interview lasted approximately 70 minutes and was characterised by a pragmatic, problem-solving narrative style. The participant spoke with the confidence of someone who had successfully managed a crisis, using firefighting metaphors repeatedly. His energy was notably high when describing his interventions, particularly the contract renegotiation and team restructuring. His entry into the project was accompanied by audible frustration, while the tone shifted to satisfaction when describing the trust-building process through demos. Finally, satisfaction with the successful turnaround and project's outcome became apparent.

The researcher's experience with similar projects created immediate recognition, as he had also managed turnaround projects and was familiar with the dynamics described. Such projects are never straightforward, as they require not only methodological expertise but also the ability to move people away from established structures, processes and behavioural

patterns. This narrative was striking in that it illustrated both technical competence and perseverance, which the researcher recognised particularly positively. For this reason, the focus was placed on examining the conflict in connection with governance structures and roles, rather than exploring the project content in detail.

Several aspects stood out. First, while the participant reinstated Scrum ceremonies, he also introduced a governance layer and took a role that was not part of the standard framework. By working with roadmaps and longer-term plans to provide the client with orientation and reassurance, he consciously departed from a textbook Agile approach. His emphasis on “without bothering the teams” and his statement that he personally managed “roadmap and budget with stakeholders”, he illustrated this protective intermediary role, which became central to stabilising the project.

Second, the use of story points for estimation appeared to be a minor detail but developed into a major governance issue. As the narrative progressed, it became evident how tying remuneration to story points created a conflict of interest on team level, affecting working practices in ways that undermined delivery.

Third, trust emerged as a factor influencing governance processes in the later stages of the project. The participant described how “very poor demos” gave way to more convincing presentations and “sneak peeks from the backlog”, which reassured management. Trust was essential in this project, enabling governance to function effectively even when immediate visible outcomes were limited in early stages of the turnaround.

However, several points remained underexplored. It was not examined who had commissioned the initial Agile coach or why the project was set up in this way. Although this approach contained elements that later contributed to the turnaround and gave the team focus, the details of the contractual negotiations were not further discussed. While he reported that the project lasted two years and was completed, it was not specified how this compared to the original plan or how the success was defined beyond contract fulfilment.

Across the research questions, patterns emerged regarding governance, roles, practices, and their influence. The participant’s buffer layer as project lead proved more influential than formal title, while at governance level, Scrum roles were complemented. Product Owners came from the client side, Scrum Masters supported the teams, while the participant had the responsibility for managing the upward connection to stakeholders. The management acted as goal setters, and the CTO was the escalation authority (RQ1).

The governance practices that stabilised the project included the division into two Scrum teams to improve coordination, the replacement of story-point billing with time-and-material tracking, and the reinstatement of Scrum ceremonies. A roadmap and weekly classical reports provided management with planning security and transparency. By shielding the teams from reporting demands and translating Agile artefacts into 'classical formats', governance was applied pragmatically between Agile and traditional expectations (RQ2).

Success was ultimately framed as completion of the contract after two years. The shift from story-point billing to time-and-material tracking changed the incentive structure and removed a source of conflict. Meanwhile, tensions between the client's expectation of "golden taps" and the teams' incremental delivery remained. The participant's remark that "everyone understands a milestone, but not necessarily an epic" showed that governance effectiveness depended less on strict methodology and more on translating between Agile and classical expectations (RQ3).

4.11 GLOBAL HR TRANSFORMATION: NAVIGATING PROCESS STANDARDISATION AND FEAR (PARTICIPANT 12)

This narrative examines a global HR transformation with formal structures and strong political sensitivities across more than 30 legal entities. Governance operated through hybrid mechanisms, while resistance rooted in job security concerns shaped both decision-making and delivery behaviour.

4.11.1 PARTICIPANT BACKGROUND

The participant is an experienced project management professional with a long-standing background in large-scale ERP and HR transformation initiatives. At the time of the interview, he is leading project management practice at a professional service provider in Europe. Having worked across multiple industries and programme environments in the last 30 years of his career, he brings what he describes as a distinctly PMI-influenced mindset, which is methodical, structured, and accountability-driven.

"I'm a PMI-contaminated person, so what I value most is being held accountable for usable outcomes."

This orientation shaped both his approach to project delivery and his interpretation of agility. While sceptical of what he calls “Agile romanticism,” he expressed appreciation for the discipline of producing tangible, incremental results rather than long delivery cycles.

4.11.2 PROJECT AND ORGANISATIONAL CONTEXT

The project discussed was a global HR transformation within a multinational industrial group. Its objective was the consolidation of over 30 national HR systems and processes into a single global Workday instance. Prior to the transformation, each subsidiary had operated its own distributed payroll, recruiting, and talent-management tools, supported by Excel-based local solutions. The transformation aimed not only to implement a unified technical platform but also to establish a consistent process and governance framework across regions. The delivery approach was formally described as hybrid, combining structured phase-gate planning with Agile-inspired iterations in areas such as data migration and local deployment.

The consulting firm to which the participant belonged was responsible for both process design and implementation support. As a senior project lead, he coordinated across several functional streams. What appeared on paper as a straightforward technology roll-out evolved in practice into a politically sensitive change programme, marked by cultural resistance, and the need to rebuild trust among HR stakeholders worldwide.

4.11.3 PROJECT GOVERNANCE JOURNEY

The participant described a global HR transformation project for a multinational industrial company. The programme aimed to consolidate distributed HR processes and systems into a unified Workday platform, covering over 30 legal entities worldwide. From the outset, it was clear that the project would be anything but a textbook implementation.

“A genuinely pure Agile project? I’ve never seen one. And that’s probably because we usually come in as externals. If there’s a tender process beforehand – an RFP – then by definition, you’re no longer working freestyle.”

What formally appeared as a harmonisation effort was, in practice, shaped by political sensitivities. During early design workshops, participants were reluctant to engage fully, fearing that the project masked a headcount reduction programme. Although objections were framed in operational or legal terms, the underlying concern was role security.

“You get all these arguments in workshops – about approval chains, labour law, national specifics. But what’s really happening is job preservation. The old roles are being protected.”

The project team was repeatedly confronted with local resistance during requirements gathering. Participants attempted to defend existing processes by appealing to supposedly non-negotiable national exceptions. The participant recognised these justifications quickly.

“It becomes a kind of shadow boxing. Everyone knows what’s really going on, but no one names it. People invent dependencies to keep things just the way they are.”

The breakthrough came when the team changed the narrative. Instead of insisting on standardisation through technical authority, they acknowledged the fear directly and replaced it with a credible and constructive alternative. The goal was not to eliminate jobs but to reconfigure roles.

“We told them: no one will lose their job because of this system. But it might not be the same job you had before. And that honesty helped. Information hiding would have killed the project.”

Once a shared vision had been established, the delivery moved forward based on predefined process variants embedded in Workday’s implementation logic. Instead of starting blank slates, clients were asked to choose from a limited set of pre-approved use cases.

“You don’t sit down and model everything from scratch. We asked: here are three ways of doing recruiting – which one fits your organisation best?”

However, the most significant delivery challenge emerged in the data migration phase. Integrating HR data from dozens of legacy systems under strict legal and organisational constraints turned out to be the most complex and risky part of the project.

“That’s the real pain point. If you’re consolidating 30 legacy systems into one target state, you’re forced to answer the killer question: Greenfield or Brownfield?”

This complexity rendered traditional phase-based planning approaches ineffective. Instead, the project team turned to prioritisation and iterative delivery to manage the massive workload and legal dependencies involved.

“That’s when it gets Agile. We built migration buckets, prioritised by criticality. Must-have, should-have, could-have – payroll data had to go. Training certificates from the ’90s? Maybe not.”

Agile thinking, in the participant’s experience, worked best when framed pragmatically and stripped of jargon. Teams that were familiar with step-by-step thinking and iterative learning were better equipped to handle uncertainty.

“You don’t get an elephant into a fridge all at once. People who are familiar with working in slices – they get that. And when you call it a sprint, it suddenly sounds modern, and people play along.”

Responsibility for the design and validation of new processes was deliberately assigned to those who would later work with them. The participant emphasised the importance of aligning delivery roles with operational ownership.

“The person building the future payroll process should be the one who must live with it. Otherwise, they just sign off a PowerPoint and disappear.”

At the programme level, governance structures were consciously kept distinct from Agile delivery rituals. A programme management office (PMO) took responsibility for driving execution and maintaining decision cadence.

“Once you hit a certain scope level, you need someone to set the pace. Getting things done. A Product Owner alone can’t do that.”

Despite the early tensions and complex delivery dynamics, the system was ultimately implemented according to plan. Processes were configured within the agreed HR system tenants, and the contractual delivery scope was met – not through methodological purity, but through pragmatism.

“Whether you do it Agile, or with whistles and handstands – I don’t care. If it works, and it lands on time.”

4.11.4 EVOLVED UNDERSTANDING OF PROJECT GOVERNANCE

While the participant valued Agile principles in theory, his understanding of governance evolved through practical tension points, particularly where role clarity, financial accountability, and operational ownership were missing. Agility without embedded responsibility, he suggested, creates dangerous illusions of control.

“Everyone wants to be self-organised until there’s a budget discussion. That’s when the room goes quiet.”

He observed that Agile frameworks often left structural gaps when applied at scale – particularly in financial oversight, escalation processes, and cross-team accountability. These were precisely the areas where classical governance, rather than being discarded, needed to be actively reintroduced.

“There’s this idea that because we have dailies and Kanban boards, everything else will sort itself out. It won’t. Especially not when you’re burning a seven-figure budget.”

His perspective also shifted regarding the role of steering committees. Rather than acting as top-down enforcers, effective governance bodies enabled delivery by offering timely decisions, protecting teams from crossfire, and holding integrators to account.

“You don’t need a board to micromanage stories. You need it to settle conflicts no one else can solve – and to remind everyone what the damn target is.”

He also challenged the notion that Agile delivery required the dismantling of PMOs or structured coordination units. On the contrary, he found these roles critical to success, especially when operating across borders, time zones, and regulatory regimes.

“You can call it a PMO, or whatever you like, but someone needs to chase down risks, track decisions, and translate across layers. That’s not optional.”

Ultimately, the participant sees governance not as a constraint on agility, but as its frame, that allowed flexibility, learning, and iteration to take root without spinning out of control.

“Agility without governance is just chaos with a nice colour palette.”

4.11.5 RESEARCHER COMMENT

The interview lasted 65 minutes. The participant communicated with remarkable directness, using clear, unembellished language to convey his pragmatic, solution-oriented perspective on governance. His narrative combines a sharp analytical perspective with dry humour, often used to expose contradictions in the way organisations claim to be Agile while avoiding genuine responsibility.

A particular strength of this narrative lies in its critical stance towards Agile as a method, while simultaneously demonstrating how methodological flexibility can be used effectively. This project appears as example of how agility does not arise from the application of formal Agile frameworks, but from methodological freedom where it added value.

Throughout the interview, the researcher found himself in broad agreement with the participant's analysis of the tensions between contractual obligations and Agile aspirations. The participant's reflections on the consultant's role, tied to fixed deliverables yet expected to remain flexible, were familiar to the researcher from his own professional experience, which influenced how the narrative was perceived.

Two observations stood out to the researcher. First, the project revealed a methodological split: standardised processes were delivered using classical workbooks and rollout logic, while data migration became the site of emergent Agile practice. This was not planned but arose from operational necessity when the complexity of migrating 30 source systems became apparent. According to the participant's framing, "that's when it becomes Agile", suggests that governance allowed for situational agility, as it was not yet clear what exactly needed to be migrated, nor was it feasible to migrate everything at once.

Second, the project's early phase was shaped by political dynamics that were not addressed through formal governance mechanisms but through direct and honest communication. The participant described how fears of job loss were driving resistance in requirements workshops. Fear had a significant influence on the project, creating emotional and political tensions that extended beyond what governance mechanisms alone could address.

While the interview offered rich insights, some areas were not fully elaborated. The concrete outcomes of the HR transformation remained unexplored in detail. It remained unclear where the methodological freedom to work iteratively originated. While the initial process design and system configuration followed a traditional approach, the migration phase shifted towards an Agile approach without a corresponding change in formal governance.

Regarding the research questions, Governance roles in this project were distributed across functional and structural layers. Product Owners were responsible for content-related decisions, while a central PMO held accountability for reporting, budgeting, and risk management. This division reflected a pragmatic response to scale and complexity. Meanwhile, governance actors faced role conflicts, particularly when expected to promote transformation while simultaneously preserving existing structures (RQ1).

Governance practices followed a hybrid logic: standardised processes were delivered through predefined implementation workbooks, while data migration was managed iteratively. This methodological split was not planned but was enabled by governance structures that allowed for situational agility where scope remained unclear (RQ2).

The organisation considered the project as successful because it met contractual expectations, not because of adherence to a particular methodology. However, formal governance did not fully account for the emotional and political dynamics of change. Resistance driven by fears of job loss had to be addressed outside the formal governance system, through direct and honest communication (RQ3).

5 FINDINGS AND DISCUSSION

This chapter presents the findings from the coding process conducted after the completion of the narrative restories. Building on the researcher's familiarity with the interview accounts, it outlines the results of the analytical process and presents the outcomes of the narrative analysis.

The 11 narrative restories presented in Chapter 4 documented individual governance journeys within their specific project contexts. Building on these accounts, the researcher conducted a cross-case comparison to identify recurring patterns across the narratives. Through thematic analysis, this chapter systematically examines governance roles, governance practices and their influence on the achievement of digital transformation.

5.1 NARRATIVE ANALYSIS

After the narrative restories had been completed, they provided a deep understanding of the source material and formed the basis for initiating the coding process. From the ninth interview onwards, repetitions in governance roles, governance practices and interaction patterns became increasingly noticeable. Interviews 10 and 11 confirmed and reinforced existing patterns without introducing substantially new conceptual directions, indicating that thematic saturation had been reached before formal coding commenced. This approach aligns with the research design presented in Section 3.3.1, which defined an initial target of approximately ten narrative interviews.

The researcher conducted the narrative analysis based on the process previously defined in Table 8. In line with Riessman (2008), each interview was fully transcribed and subsequently returned to the participant for review, together with the corresponding restory, before the analysis began. This participatory validation ensured the accuracy of the transcripts and the completeness of the narratives.

The familiarisation phase followed the approach outlined by Braun and Clarke (2006, 2012). The researcher reread each transcript, accompanied by note-taking and, where necessary, renewed engagement with the transcript to provide the foundation for subsequent coding.

Codes were identified according to their relevance to the research questions and their potential connection to governance roles, governance practices or influence on project success. The overview shown in Figure 11 helped maintain analytical focus during coding. Codes containing meaningful information were extracted from the transcripts and systematically documented in

a Microsoft Excel spreadsheet to support the subsequent organisation of the analytical process, as shown in Table 9.

Interview	Code No.	ID	Code / Paraphrase	Timestamp	Role	Practice	Influence	RQ Link
P2	10	P2.10	"PMO hat operativ durch Dokumentation unterstützt"	00:17	PMO	Coordinating	Project efficiency	RQ2 (Practice)

Table 9: Illustrative code extraction and organisation

The analytical process began with the formation of subthemes. In total, 497 codes were identified, and 115 subthemes were initially developed. The researcher assigned an analytical focus to each code, which was categorised according to the research questions. In the first iteration, subthemes were refined and consolidated to ensure conceptual coherence, while insufficiently supported codes were removed, resulting in a total of 481 codes. The codes were then grouped into broader themes, supported by links to governance roles, governance practices and the influence on the achievement of digital transformation. Through further iterative comparison across the subthemes, recurring patterns across the interviews emerged and enabled the initial development of themes.

After the first set of themes had been created, the refinement phase involved multiple iterations to ensure analytical consistency. The first iteration focused on improving the textual clarity of subthemes and optimising their allocation within themes. The second iteration resolved multiple assignments of subthemes to themes and included quality checks, resulting in a reduction to 31 distinct subthemes. The third iteration reviewed the overall balance and completeness of the thematic structure, leading to the establishment of 11 final themes that formed the analytical core of the narrative study, as shown in Table 10.

ID	Subtheme Iteration 1	Subtheme Iteration 2	Theme Draft	Subtheme Finalisation (DE)	Theme Finalisation (DE)	Subtheme Final (EN)	Theme Final (EN)	RQ Link
P12.1	Wahrgenommene Agilität	Agile Methodik und Governance-Pragmatismus	Hybridansätze	Hybridität als Realität und als nicht Ausnahme	Agile Methodenauswahl und Hybridansätze	Hybridity as the norm rather than exception	Agile Method Selection and Hybrid Approaches	Governance Practices

Table 10: Illustrative cyclic coding and derivation of subthemes and themes

The final iteration included a cross-check based on the number of codes within subthemes and themes. This ensured that subthemes and themes were not built from isolated patterns but were evident across several interviews rather than being based on singular mentions. This approach ensured that the subthemes and themes reflected recurring experiences rather than individual statements, as shown in Table 11.

Participant	P1	P2	P4	P5	P6	P7	P8	P9	P10	P11	P12	Sum of codes
Roles	12	1	9	4	23	5	3	24	17	28	17	143
PMO and sponsors as governance actors				4	11			10		1	9	35
Role conflicts and resource tensions	7		4		10	2		13	8	21	4	69
Limits to the effectiveness of formal governance	5	1	5		2	3	3	1	9	6	4	39
Practices	18	15	18	16	3	15	8	50	13	12	18	186
Agile method selection and hybrid approaches	6	4	6	3		3	5	24		3	13	67
Escalation mechanisms and areas of autonomy	9	5	7	5	3	5		3	1	7	3	48
Coordination and structural integration	3	6	5	8		7	3	23	12	2	2	71
Influence	15	10	19	8	6	17	27	5	7	23	15	152
Effects of autonomy (positive/negative)	3	2		5	4	7	5	1	3	4	3	37
External constraints as agility killers	5	1	9	3	1	8	1	2	4		6	40
Lack of Agile understanding	4	4	8		1	2	12	2		11	3	47
Trust-based governance mechanisms	3	3	2				9			8	3	28

Table 11: Cross-check for code distribution per theme

The researcher derived themes and subthemes close to the participants' original wording and translated them from German into English only after consolidation to avoid inaccuracies caused by repeated translation. In the final step, the researcher described the themes and subthemes, as presented in the following section. Following the principles of Clandinin and Connelly (2000), Riessman (2008) and Saldaña (2016), each theme and subtheme was elaborated through supporting quotations and theoretical integration based on the literature review.

5.2 DERIVED THEMES AND SUBTHEMES

This section presents the findings of the narrative analysis in relation to the research questions. The themes and subthemes are aligned with each research question to provide a clear structure and traceability from data to conclusions. They are presented in three sections corresponding to the three research questions: Section 5.2.1 addresses governance roles (RQ1), Section 5.2.2 addresses governance practices (RQ2), and Section 5.2.3 addresses the influence of these roles and practices on the achievement of digital transformation (RQ3).

To support reliability, unique identifiers were assigned to each quotation, allowing every analytical step to be traced back to its narrative source. The discussion then examines the

implications of these findings for research. An overview of the outcomes presented in this chapter is provided in Table 12.

RQ	Theme	Subtheme	
Governance roles	PMO and Sponsors as central governance actors	1	PMO as an underrated key role
		2	Top-level sponsorship overcomes lethargy
		3	Collaboration between top management and project teams
	Role conflicts and dependencies within the governance system	4	Discrepancies between theory and practice
		5	Resource conflicts between project and line functions
		6	Role conflicts between business and IT
		7	Goal conflicts with external suppliers
	Limits of formal governance structures	8	Governance elements with limited impact
		9	Compensating structural weaknesses through individuals
Governance practices	Agile Method Selection and Hybrid Approaches	10	Value contribution of Agile practices
		11	Hybridity as the norm rather than exception
		12	Formalism in Agile practices
		13	Traditional reporting requirements in Agile projects
		14	Framework dogmatism blocks adaptability
	Steering and escalation mechanisms	15	Governance guidelines define scope for action
		16	Escalation mechanisms
		17	Legitimate information obligations of Agile teams
	Organisational integration enabling practices	18	Cross-team coordination and scaling
		19	Effective collaboration through physical proximity
		20	Team-based and governance-driven learning
		21	Departure from project-based steering
Influence on the achievement of digital transformation	Factors influencing team autonomy and efficiency	22	Scope for action through clear goals
		23	Meeting and reporting overload
		24	Team as a driver for bottom-up innovation
	External constraints limit agility and reinforce classical control	25	Budget constraints reduce innovation and project outcomes
		26	Cost pressure triggers a return to traditional control
		27	Dependencies increase uncertainty and hinder prioritisation
	Trust-based governance mechanisms	28	Partial results create trust and reduce risks
		29	Trust through success communication
	Different agility views create tension and misalignment	30	Agile inexperience and change management
		31	Management understanding of iterations

Table 12: Overview of themes and subthemes

5.2.1 ROLES SHAPING GOVERNANCE OF AGILE PROJECTS

This section addresses Research Question 1: What governance roles are experienced in Agile digital transformation projects?

Drawing on the 11 narrative accounts, three themes emerged. First, PMOs and sponsors were present across the projects as central governance actors, operating through informal coordination and personal commitment as much as through their formal mandates (Section 5.2.1.1). Second, divergent understandings of theoretical and practical Agile roles resulted in conflicts between project and line functions, between business and IT, and between clients and external suppliers (Section 5.2.1.2).

Third, formal governance structures often had limited impact in practice, leading individuals to step in and compensate for structural weaknesses (Section 5.2.1.3). Taken together, these themes show that governance roles in Agile digital transformation projects consistently diverge from their formal definitions in traditional project governance literature, with this divergence intensifying as project complexity grows. The discussion at the end of this section (Section 5.2.1.4) contrasts the findings with the governance role models of Müller (2009) and Too and Weaver (2014), agency and stewardship theory (Davis et al., 1997; Jensen & Meckling, 1976), and Luna et al.'s (2016) Agile governance meta-principles, preparing the answer to RQ1 in Section 6.1.

5.2.1.1 PMO and sponsors as central governance actors

In Agile projects, PMOs and sponsors hold key steering functions. They secure decision-making capability, prioritisation and the translation of strategic goals into operational delivery.

5.2.1.1.1 PMO as an underrated key role

The PMO ensures transparency regarding resources, contracts and progress. It relieves operational teams by taking over administrative tasks and contributes to the standardisation of governance practices such as status reporting. Its importance often becomes visible only when it is absent, for example when Scrum Masters or Product Owners are expected to take on these tasks in addition to their own responsibilities. Several participants emphasised that when coordination requirements between teams increase or projects grow in complexity, the PMO becomes increasingly relevant as a central coordination and support function for teams. One participant described the PMO as “the most important role without which nothing works” (P6.30).

5.2.1.1.2 Top-level sponsorship overcomes lethargy

Sponsors influence digital transformations in two ways. First, they accelerate decision-making processes, for example by bypassing middle management and addressing decision-makers directly, because “in more hierarchical cultures there is not much resistance” (P12.41). The direct presence of executives in projects creates commitment and can replace traditional steering committee models in settings that “do not fit Agile cycles and IT release cycles” (P6.7).

Furthermore, sponsors support the long-term establishment of Agile methods “if they have initiated them, for example through personal experience” (P9.65), or if they continue to accompany them. Sponsor involvement therefore not only increases the speed of decision-making in Agile projects but can also help establish agility as a permanently embedded way of working across the organisation.

5.2.1.1.3 Collaboration between top management and project teams

From the participants’ perspective, clear decisions at the top level create the guidance that teams need. This contrasts with a widespread misconception in middle management that “there always has to be someone in between” in decision-making (P9.75).

One participant explained that his project team requested prioritisation from the board as sponsor “with A or B, not A and B”. Top management had not previously been familiar with this form of clear decision template in Agile projects, but it was highly appreciated and enabled clear prioritisation (P6.23). Such prioritisation promotes focus and prevents the political or organisational dilution of objectives (P6.14). Priorities are also reviewed regularly, for example as part of QBRs (P9.66).

Project teams value this direct collaboration with top management. However, it also means that Agile teams must learn how to prepare decision alternatives in the form of clear A-or-B templates, enabling executives to support governance decisions effectively.

5.2.1.2 Role conflicts and dependencies within the governance system

Across projects, tensions emerged between business, IT, line functions and external partners. Conflicting responsibilities, interests and resource allocations created friction within governance systems.

5.2.1.2.1 Discrepancies between theory and practice

Participants reported clear deviations between their theoretical understanding of Agile roles and their practical implementation in Agile projects. Although organisations assigned formal Scrum roles such as Product Owner and Scrum Master, their actual execution often deviated from theoretical frameworks. “For each team there is a Product Owner [...] but I would not equate that with the classic description from the Scrum Guide” (P9.57), one participant summarised.

In practice, additional governance roles such as a “Proxy Product Owner” (P9.56) emerged, or project manager roles were used as a “middle layer between project and management” (P11.41). Especially in projects involving several Agile teams, teams were grouped and coordinated through additional levels (P9.58).

In addition, traditional governance roles and Agile roles existed in parallel when projects were “completely orchestrated by a project manager” (P9.63). This discrepancy between Agile textbook theory and practice should be seen as a deliberate organisational decision, which becomes particularly visible as the number of coordinated teams increases and governance layers emerge.

5.2.1.2.2 Resource conflicts between project and line functions

Participants observed that project team members were often not fully allocated to the project and simultaneously performed line responsibilities. This led to resource conflicts, with the line organisation attempting to withdraw employees from projects. One participant described how, “in Agile teams, which are set up in an interdisciplinary way, there were always somehow attempts to pull resources from one corner or another” (P11.61).

Further tensions arose because of differing interests between project and line functions. While project members focused on rapid delivery, representatives from the business side tended to pursue a longer-term perspective (P1.22). Instead of creating integrated teams, this led to groups with different goals, which in several cases escalated to the steering committee (P4.13). One participant described the early clarification of resources and funding as a central governance responsibility (P11.47).

5.2.1.2.3 *Role conflicts between business and IT*

Looking beyond the team, participants reported role conflicts at the business–IT interface that arose in early project phases. IT was formally involved as a stakeholder but had “no say in implementation” (P1.7), resulting in unclear responsibilities. In another case, these role conflicts escalated during project execution, as both sides attempted to build parallel structures and responsibilities became increasingly unclear. One participant described a case in which the business provided the Product Owner according to the governance arrangement, but he did not want to write user stories. IT therefore had to appoint its own Product Owner. This example illustrates that, despite Agile flexibility, project roles require clear definition by governance to avoid conflicts. Otherwise, this leads to “four or five people instead of clarity” (P6.17), resulting in duplicate staffing and inefficient use of resources.

5.2.1.2.4 *Goal conflicts with external suppliers*

Once external service providers with delivery obligations became part of a project, contractual agreements had a stronger influence than project governance. Several participants on the client side reported that suppliers made decisions based on profitability targets and often did not recognise quality issues or rework as part of the agreed project scope (P10.27). They also noted that “KPIs of the integrator linked to remuneration collide with Agile approaches” (P1.26).

One participant described his perspective as an external service provider and the challenges that contracts create in Agile environments. He reported unclear billing models based on factors such as story points (P11.7) and described how a return to the traditional “time and material instead of story points” (P11.6) became necessary. These examples illustrate the challenge for governance of creating a framework that aligns economic interests and quality requirements within contractual agreements.

5.2.1.3 *Limits of formal governance structures*

Formal governance structures tend to lose effectiveness as Agile teams operate with higher levels of self-organisation. At the same time, individuals at team level compensate for weaknesses in governance structures.

5.2.1.3.1 *Governance elements with limited impact*

Several participants reported that governance elements such as middle management boards or monitoring PMOs added little value, particularly when teams became more self-organised. Organisations maintained these elements more out of organisational routine than

demonstrated effectiveness. One participant described how the PMO “stood alongside and watched” once the team had reached a mature working mode (P6.19).

In other narratives, the limited effectiveness of steering committees became visible in the fact that they were formally responsible for budgets and milestones, while Agile formats such as sprint reviews had meanwhile become established by the teams. The decision-makers “did not attend sprint reviews” (P4.12). As a result, project progress could not be demonstrated effectively, and decision-making based on actual delivery was restricted.

The adoption of scaled Agile frameworks showed similar patterns. These frameworks introduced structural elements intended to support coordination, yet these did not always have the intended effect when they did not fit the organisation and its routines. Structures provided by the SAFe framework, for example, created additional layers that “lacked the people with real decision power” (P9.27). Governance must therefore ensure that, when teams are granted more autonomy, governance also adapts to this autonomy and does not dogmatically adhere to old routines.

5.2.1.3.2 Compensating structural weaknesses through individuals

Several participants described situations in which individual commitment compensated for weaknesses in governance structures. Across the interviews, motivated individuals created clarity where governance roles or practices were ineffective. One participant, for example, took on an extended investigator role, combining requirements work, testing and operational preparation. He explained that this approach allowed them to “cover both content and project management” when no clear structure was in place (P10.14).

Other participants pointed out that essential coordination tasks emerged through personal initiative rather than formal assignment. One participant acted as the central point of contact between business, planning and delivery. He “communicated requirements across parties” because no defined governance interface existed (P10.21). Similar patterns appeared in projects lacking a governance framework with clear decision-making responsibilities.

Another participant described entering a failing project as a “firefighter” and re-establishing basic Scrum routines, presenting this as necessary to stabilise delivery while bridging gaps between Agile working practices and management expectations (P11.33). This shows that Agile principles were lived by participants beyond governance formalities, resulting in personal role flexibility driven by motivation.

5.2.1.4 Discussions on governance roles for Agile projects

The themes show that governance in Agile projects is carried by a set of roles related to Research Question 1, revealing a diverse set of responsibilities and interfaces that combine traditionally established positions with newly emerging ones.

On the steering side, PMOs, sponsors, top management and steering boards were identified as key players, while middle management was more often perceived as a bottleneck. On the project side, formal Scrum roles such as Product Owner and Scrum Master were present, but in multi-project settings these were supplemented by additional individual roles, including Proxy Product Owners and project managers acting as intermediary layers between teams and management. Further roles became apparent through dependencies, particularly the business line organisation, the IT line organisation and external suppliers. The themes demonstrate that governance in Agile projects involves a diverse range of responsibilities and interfaces.

These findings largely confirm Müller's (2009) roles, which include PMOs, programme management and steering boards as core governance components. While Müller's model assumes clearly defined roles and stable control mechanisms, this research indicates that governance in Agile projects is still shaped by traditionally anchored governance roles, although these operate in a more flexible and context-dependent manner.

According to Müller (2009), governance roles constitute the central components through which governance becomes effective in practice. According to the findings of this study, governance roles depend on the scale and complexity of the project. The extended view proposed by Too and Weaver (2014), which includes the interactions and interfaces between these roles, is supported by this study. As in their findings, sponsors act as the key link between strategy and project, ensuring resources, providing orientation and maintaining responsibility throughout the project lifecycle. In addition to Müller (2009) and Too and Weaver (2014), who conceptualise governance as a formal system, this study shows that governance in Agile projects also operates at an informal level.

The central role of PMOs stands out in this research and shows a high degree of variation, as already noted in the literature (Dikert et al., 2016). The PMO primarily aligns the flexibility of Agile projects with the orientation required by higher governance levels. In these Agile settings, it moves away from a purely controlling function towards a role that enables team agility by acting as an intermediary between multiple teams and governance systems.

The observed roles in this study can be associated with both agency theory (Jensen & Meckling, 1976) and stewardship theory (Davis et al., 1997). The PMO, for instance, reflects an agency-oriented logic of control and accountability, whereas sponsors familiar with Agile principles adopt a stewardship-oriented logic based on trust and support. This means that governance is not defined by either theory alone.

This understanding of roles can be further related to the Agile governance meta-principles proposed by Luna et al. (2016). In smaller settings involving one or two projects, lightweight governance structures involving project teams and sponsors prevail. As projects grow, formalisation increases, resulting in additional roles and decision-making layers, reflecting the principle of appropriate governance. Within the dimension of business orientation, sponsors act as mediators between strategic guidance and operational delivery, while the influence of middle management diminishes. Consistent with the people-centred governance dimension, trust has a stronger impact than formal processes.

Komus' (2020) study, one of the few recent studies on Agile projects in Germany, shows a growing application of hybrid project management approaches. This study confirms that trend. The analysed narratives show that governance is shaped by hybrid roles such as PMOs, sponsors and proxy project managers. Sponsors fulfil steering functions by combining classical control logics, as described by agency theory, with trust-based approaches aligned with stewardship theory. While Komus (2020) focuses more on project management, this study extends these findings by showing that governance effectiveness depends not only on formal roles and processes but also on direct interaction, trust and situational adjustment towards project objectives.

Notably, these governance roles did not remain fixed. Participants described how the prominence and formalisation of roles such as the PMO evolved as projects increased in complexity, highlighting the increasingly dynamic character of governance explored further in relation to RQ2 (Section 5.2.2) and examined in full under RQ3 (Section 5.2.3).

5.2.2 APPLIED GOVERNANCE PRACTICES

This section addresses Research Question 2: What governance practices are applied by governance actors in Agile digital transformation projects?

Three themes emerged from the narratives. First, organisations rarely used pure Agile methods. Instead, the selection of Agile methods was selective, leading to hybrid approaches that combined Agile delivery routines with traditional governance practices such as quality gates, formalised reporting and milestone steering (Section 5.2.2.1). Second, steering and escalation mechanisms emerged as the way governance bodies set boundaries for Agile teams. Teams reached the limits of their autonomy when reporting requirements and escalations to higher levels of management determined how they were expected to work with governance bodies (Section 5.2.2.2). Third, cross-team coordination, physical proximity and team-based learning enabled Agile work to scale beyond single teams. These practices also served as an intermediary stage towards a continuous delivery approach (Section 5.2.2.3). The discussion (Section 5.2.2.4) contrasts these findings with Komus' (2020) findings on hybridity in German settings, Kujala et al.'s (2021) six governance dimensions as extended by Lappi et al. (2018), and Luna et al.'s (2016) Agile governance meta-principles, preparing the answer to RQ2 in Section 6.2.

Governance practices are always carried out by governance roles, which is why roles such as Proxy Product Owners and project managers also appear in this section. Here, they are discussed as part of governance practices. The role discussion is provided in Section 5.2.1.4.

5.2.2.1 Agile method selection and hybrid approaches

The implementation of Agile methods in project governance highlights a gap between theoretical frameworks and organisational practice. Rather than adopting pure or textbook Agile approaches, organisations consistently combine Agile and traditional governance elements. Hybrid approaches emerge not as a transitional compromise, but as an intended approach to fulfilling organisational requirements and needs.

5.2.2.1.1 Value contribution of Agile practices

When examining practices connected with the governance of Agile projects, participants showed a critical attitude. They emphasised that organisations must consciously decide whether and how to apply Agile principles. In practice, agility is often imposed by leadership levels (P9.22) without organisational readiness or demand. Service providers and consultants also reported that “projects were sold as Agile because Agile sells” (P11.37). This resulted in practices at all levels that “do not contribute to value creation” (P9.45).

One participant warned against the untested use of Agile practices and recommended conducting a preliminary study (P9.28) to assess which problem should be addressed and

whether an Agile project is the appropriate solution (P9.5). At the same time, participants underlined the benefits of iterative work and the focus on “usable results” (P12.11) instead of lengthy planning phases. Organisational frameworks, particularly governance systems, must therefore ensure that Agile practices are applied sensibly, in the right context and when the organisation is ready.

5.2.2.1.2 Hybrid approaches as the norm rather than exception

In this research, organisations rarely implemented pure Agile frameworks from textbooks. Instead, they combined Agile approaches with classical control practices. One participant reported a phase-based approach “with quality gates and fixed deliverables” (P5.10), while others described the use of long-term planning (P4.16). In practice, hybrid ways of working dominated rather than represented an exception. One participant put this clearly: “I have never experienced a truly pure Agile project” (P12.1). Agile methods are consciously combined with classical practices to remain aligned with existing structures. Instead of focusing on a pure Agile framework, teams often prioritised pragmatic fit to meet governance requirements, which can be a “complete mixture [...] but wonderful” (P8.6) when it contributes to project success.

5.2.2.1.3 Formalism in Agile practices

The role conflicts and lack of resource allocation described above also affected the operational practices of Agile teams. The originally intended cross-functional collaboration was replaced in some projects by divided workflows, for example when design and testing were again organised separately (P1.25). This development was accompanied by increasing formalism. Documentation requirements such as the “definition of ready” are intended to provide guidance for teams, but they do not always have the desired effect and may increase workload, whereas “only three keywords” (P9.32) can also be sufficient.

In some contexts, Agile teams carried out Agile rules and routines mechanically, such as dailies or retrospectives. One participant noted: “Daily may only be 15 minutes, the rest in the after-daily” (P2.25). Participants responded to this development with pragmatism. Instead of strict prescriptions, they relied on principles such as stakeholder orientation (P9.33) or simple control logic (P9.30), which were perceived as more effective than rigid rules.

5.2.2.1.4 Traditional reporting requirements in Agile projects

Reporting provides essential transparency in Agile projects, yet it often reflects traditional steering needs that do not always align with Agile principles. Several participants noted that status formats remained strongly formalised. When weekly reports were produced for

governance steering boards, discussions began only “when problems arise” (P2.8). At the same time, hybrid forms emerged in which teams produced structured reports alongside Agile artefacts because steering bodies expected detailed risk summaries. As a result, according to the participants, the focus shifted back towards traditional metrics such as milestones, which are easier to understand than feature structures and therefore keep reporting “relatively classical” (P4.24). If traditional formats do not force Agile teams into detailed long-term planning and steering practices, the interviews show that reporting in Agile projects can be combined with product demos or other Agile metrics without contradiction.

5.2.2.1.5 Framework dogmatism blocks adaptability

When organisations apply Agile frameworks too rigidly, this research suggests that they can paradoxically create the rigidity that agility was intended to overcome. One participant noted: “We do not need a plan, we are Agile – that is the classic” (P12.13), illustrating how project teams in particular may misunderstand and apply Agile principles dogmatically. This strict adherence prevents the role flexibility at team level mentioned earlier, which has proven beneficial to project success. One participant took the position that Agile team members “must perceive flexibility, otherwise it becomes slavish and not Agile” (P2.2).

Problems arise when organisations adopt Agile frameworks unreflectively from other contexts, as one participant described as “slavishly Scrum, not smart” (P2.24). Participants emphasised that “empowerment in teams – using broader creative potential” (P2.1) could be achieved if the governance system gave teams more freedom, which does not necessarily need to be attributed to any Agile framework. Teams also have an obligation to use this freedom, when granted by governance, by making responsible decisions and ensuring knowledge transfer within and beyond the team (P1.30).

5.2.2.2 Steering and escalation mechanisms

Agile projects in this research operated with new forms of governance steering that blended formal rules with situational decision-making. Escalations occurred mainly through informal channels, while defined boundaries and reporting duties aimed to maintain orientation.

5.2.2.2.1 Governance guidelines define scope for action

Teams need defined decision-making spaces in order to work autonomously. The shift from centralised control to decentralised regulation becomes evident when project teams receive more freedom in implementation, while control points ensure the strategic consistency of outcomes (P9.29).

One participant noted that funding and commitment, transparent communication paths and a defined but adaptable scope (P11.36) are the main governance tasks. These guidelines enable teams to act autonomously, supported by a minimum number of effective decision-makers within the governance system (P1.9). In practice, this can be a client who is also the user of the result (P1.6), creating short coordination paths and pragmatic decisions without falling into management overhead while still ensuring result quality.

5.2.2.2.2 Escalation mechanisms

Agile projects do not always run according to plan, but formal escalation paths in Agile projects often remain ineffective or lead to temporary task forces outside the governance system. Instead, effective escalations often take place informally through hierarchies.

In this research, effective escalation paths depended on individuals. When problems occurred, participants pragmatically used their personal contacts outside the project organisation (P7.19). One participant reported that he involved his line manager directly when necessary. Although this line manager had no official project mandate, his formal authority enabled him to bring solutions through the hierarchy (P7.15). In such moments, formal governance paths lost relevance, as teams turned to people with corresponding organisational standing (P7.16).

Organisations often responded to escalations by reverting to classical control patterns (P6.26). When something did not go according to plan or a formal status report indicated issues, the steering board or top management activated task-force mode and managed according to traditional principles: “who does what by when”, as one participant summarised (P5.21).

Escalations and their handling therefore did not take place entirely through governance bodies or formal instances, but also through hierarchical structures and temporary interventions outside formal project governance.

5.2.2.2.3 Legitimate information obligations of Agile teams

Management carries responsibility for the budget and exercises a governance control function that is both legitimate and necessary. For these decision-makers, it is irrelevant whether Agile frameworks use metrics other than budget as a benchmark (P12.19). Financial accountability and Agile working should therefore not be mutually exclusive. One participant shared his impression: “With Agile people, the budget is often forgotten” (P12.18).

Despite legitimate interests in budget and results, hierarchical interventions and overruling in planning and desired outcomes became problematic. One participant cited intervention in sprint planning as an example, where management inserted and prioritised features in the planning, which for him “is not Agile” (P7.13). The core problem is therefore not legitimate management information requirements, but interference in the operational work of teams in order to gain control and transparency. Agile teams can avoid this by developing an understanding of financial framework conditions and accepting them as a relevant metric.

5.2.2.3 Organisational integration enabling practices

Agile structures are closely interlinked with existing organisational units. Their effectiveness depends on interface management and physical proximity between teams.

5.2.2.3.1 Cross-team coordination and scaling

From a certain level of size and outcome complexity onwards, teams cannot deliver end-to-end results independently within a transformation and must work in parallel on related initiatives (P9.21). The right work must therefore happen at the right time in the right team (P9.46), which requires coordination. This coordination becomes a central governance challenge when teams have different delivery cycles and external dependencies. These arise, for example, when teams working on customer deliveries operate in sprints, while other technical teams provide backend systems subject to more technical dependencies (P9.12). Participants reported that when self-organisation and coordination practices between several teams are insufficient, roles or additional governance structures emerge as compensation. The names for these roles and structures vary. Project managers act as communication channels between teams (P9.16), while so-called Proxy Product Owners mediate between teams (P9.13).

5.2.2.3.2 Effective collaboration through physical proximity

Physical proximity was reported as a decisive success factor for effective collaboration in Agile contexts. When teams worked physically co-located in the same room, innovation and quick coordination emerged, whereas a lack of proximity led to frictional losses and coordination overhead. Participants reported a wide range of experiences, including convened meetings with business executives and sponsors in which project solutions and innovation emerged spontaneously on a flipchart (P2.19).

Informal presence also played a role in this research. For example, an IT executive regularly came to the project office, building trust and replacing formal project reporting (P2.13). Another participant reported challenges in cross-country collaboration between project teams, which

were resolved through the coordination of a dedicated on-site resource familiar with the cultural differences (P5.17).

5.2.2.3.3 Team-based and governance-driven learning

Learning played a central role in Agile projects and took place at several levels. Teams drew on their own experience, for example through lessons learned sessions that improved future rollouts, even though “knowledge can be lost when people leave” (P7.18). Alongside this team-based learning, governance structures enabled their own learning cycles operating at a broader organisational level. Quarterly Business Reviews were a key mechanism in this regard. One participant described the QBR as a regular opportunity to review direction and “correct the course when needed” (P9.22). The QBR format could evolve from quarter to quarter, based on feedback and operational insight.

However, learning formats require active facilitation and a clear purpose. Otherwise, there is a risk that routines such as team retrospectives may be misused for fundamental debates rather than reflections (P8.32).

5.2.2.3.4 Departure from project-based steering

As described by participants, their companies began to rethink their views on Agile projects. These organisations turned projects into long-term initiatives running in parallel (P9.23). This shift required new governance practices. Agile portfolio management instances (P7.27) or governance boards took over prioritisation and coordination (P10.5), while OKR systems ensured strategic alignment. Product Owners ensured exchange between initiatives and clarified dependencies (P9.24). With these continuous delivery streams, the planning logic changed. Instead of focusing on budget and timelines, organisations used top-down approaches with fixed planning and budgeting increments. However, these also led to longer decision-making processes, as one participant reported (P10.21).

5.2.2.4 Discussions on governance practices for Agile projects

In this study, governance for Agile projects is characterised by a set of interrelated practices that combine governance aspects with Agile principles, thereby addressing Research Question 2.

The narratives revealed a set of practices that combines Agile delivery routines with traditional governance instruments. On the methodological side, hybrid configurations of Agile and classical elements were the consistent pattern, with OKR systems used for strategic alignment

and quarterly business reviews (QBRs) emerging as a recurring synchronisation practice between teams and governance bodies. Classical status reporting, milestone steering, quality gates and formal escalation paths remained in use alongside Agile practices. To integrate Agile projects into governance and organisational settings, cross-team coordination structures, interface roles and physical proximity between teams and governance bodies emerged, while team-driven retrospectives supported projects in scaling beyond single teams.

Agile and traditional team and governance practices coexisted and were consciously combined to balance stability and adaptability. By contrast, the dogmatic application of Agile frameworks or excessive traditional formalism reduced adaptability and led to the perceived bureaucratisation of project work. Komus' (2020) study similarly acknowledges the coexistence of classical and Agile methods. Komus views the resulting hybridity as a transitional stage towards permanent Agile delivery organisations. For the participants in this study, hybridity represents an effective combination that aligns value creation through Agile principles with classical governance requirements, which also aligns with the international State of Agile Report (Digital.ai, 2024).

The six dimensions proposed by Kujala et al. (2021), extended by Lappi et al. (2018) specifically to Agile contexts, offer a structural model for categorising governance practices. These dimensions were evident across the interviews, although their effectiveness varied depending on the organisational context.

First, the goal-setting dimension is defined as the establishment and adjustment of project objectives. Participants frequently associated this with governance boundaries, such as time limits, budget constraints or minimum scopes. Governance and Agile teams used OKR systems for strategic alignment and prioritisation. The focus shifted from detailed planning to the delivery of "usable results" through iterative cycles over a defined period of several months.

In the monitoring dimension, which refers to the oversight of progress and quality, participants described different approaches. While classical status reporting remained a common practice, other teams replaced formal reports with close collaboration with clients or sponsors. Teams viewed milestones as legitimate instruments of control rather than constraints.

The coordination dimension addresses alignment between teams and departments. In projects involving multiple teams, cross-functional coordination structures and specific interface roles emerged. These role profiles, and the associated practices, were highly project-

specific in this research. The interviews indicate that physical proximity was essential for spontaneous coordination and trust-building between teams and governance bodies.

The decision-making dimension relates to decision processes. According to the interviews, the steering board or top management centralised decisions on strategic direction and objectives. Teams acted autonomously within established boundaries, although these boundaries differed across projects.

In critical project phases or phases of higher complexity, these decision mechanisms tended to change. Participants reported the establishment of temporary task forces by governance bodies, which took over steering responsibilities and reverted to classical principles, such as clearly defined accountabilities and deadlines. This introduced a degree of hierarchical control into Agile teams. In several cases, participants observed management interventions in operational decisions, for instance through the re-prioritisation of features or the insertion of new requirements into ongoing sprints.

The capability-building dimension, defined as competence development and learning through reflection and knowledge sharing, was not clearly identifiable in connection with formal governance practices. Instead, Agile teams independently initiated learning formats, such as retrospectives, to continuously evolve their practices.

While the dimensions of Kujala et al. (2021) help structure governance practices, the Agile governance principles proposed by Luna et al. (2016) support an understanding of how these practices operate in governance contexts. The principle of appropriate governance, combined with the principle of simple design and continuous refinement, highlights that governance practices must remain contextually adapted and lightweight. Establishing boundaries rather than detailed control proved effective, whereas over-formalisation through excessive reporting requirements had the opposite effect.

The principle based on quick wins reflects short iterations and results that demonstrate visible progress. Participants perceived project governance as most effective when it provided clear boundaries without dominating operational decision-making. Excessive formalisation, for instance through weekly reporting cycles, reduced value creation.

QBRs emerged as a particularly relevant mechanism in this study, showing a notable impact that had not been addressed in depth in the literature review. According to the literature, traditional annual planning cycles are no longer sufficient in volatile contexts such as digital

transformations, which has led organisations to adopt more frequent review mechanisms such as QBRs. Despite their increasing practical relevance, QBRs remain largely unexplored in academic research (Hoeft, 2023).

As with governance roles (Section 5.2.1), the practices observed were adapted to context, and their balance between Agile autonomy and traditional control depended on project complexity and uncertainty. This reinforces the view, developed further in Section 5.2.3, that governance practices in Agile projects evolve continuously, particularly in response to escalations.

5.2.3 INFLUENCE ON THE ACHIEVEMENT OF DIGITAL TRANSFORMATION

This section addresses Research Question 3: How do governance roles and practices influence the achievement of digital transformation in Agile projects?

Building on the role dynamics (Section 5.2.1) and the variation in practices (Section 5.2.2), this section shows most clearly that governance in Agile projects is not a static system but a dynamic configuration that adapts to factors such as complexity and technical or financial uncertainty.

Four themes emerged, revealing that governance for Agile projects is not a static construct but evolves dynamically. First, governance design directly shapes team autonomy and efficiency: clear goals and defined autonomy enhance ownership and bottom-up innovation, while meeting and reporting overload affects team productivity (Section 5.2.3.1). Second, budget pressure, regulatory requirements and dependencies as external constraints on governance and projects reduce ambition and trigger a return to traditional control mechanisms (Section 5.2.3.2). Third, partial results, visible progress and active success communication create the trust through which governance actors grant Agile teams the autonomy needed to deliver project outcomes (Section 5.2.3.3). Fourth, differing understandings of agility and Agile practices at team level produce tensions that affect the achievement of transformation goals (Section 5.2.3.4). The discussion (Section 5.2.3.5) maps these findings against the five dimensions of project success (Ciric Lalic et al., 2022; Shenhar & Dvir, 2007), preparing the answer to RQ3 in Section 6.3.

5.2.3.1 Factors influencing team autonomy and efficiency

Governance design directly shapes how teams assume responsibility. Clear goals and defined autonomy enhance ownership, while excessive control constrains it.

5.2.3.1.1 Scope for action through clear goals

Clear goals create scope for action by providing teams with orientation without prescribing solutions. One participant summarised the principle as follows: “Clear goal, team finds best way itself.” Intrinsic motivation arises through responsibility and through “understanding the why” (P6.1). It is therefore the task of governance in Agile settings to translate strategic priorities into operational focus without specifying detailed instructions.

In practice, this is reflected in goal systems across governance that range from long-term vision to iterative objectives. Teams challenge themselves and define concrete achievement targets (P8.34). These targets can be divided into “must have, should have, could have”, so that teams must critically assess and adjust their planning accordingly (P12.44). In other words, teams need orientation from governance decision-makers about the “what” and “why”, not instructions for the “how”.

5.2.3.1.2 Meeting and reporting overload

Governance can become an end in itself when reporting and meeting requirements become excessive. Instead of enabling control and support through governance steering bodies, reporting ties up team capacity in preparing reports, which, in the eyes of one participant, led to a destructive cycle: management demands more transparency through reporting, teams lose working time through preparation, results fail to appear, management loses trust and demands even more reporting (P11.27).

Teams perceived the effort required for reporting as considerable. One participant reported that the team spent 20–30% of its time preparing data and dealing “with absurd metrics such as story point counting” instead of working productively (P11.28, P11.3). Another participant described an extreme personal case caused by a multitude of reporting meetings with various committees, which on some days accounted for up to “95% of meetings” (P7.21). In other cases, these meetings multiplied, forcing teams to “report twice or three times” and sometimes on a daily basis (P1.3). Under these circumstances, governance risks not only losing its steering function but becoming a control system that consumes more capacity than it provides support.

Other participants reported a fundamental governance pattern in which new practices and structures emerged faster than old ones were abolished, not only in relation to reporting. Organisations added new elements, old ones remained and no one questioned their purpose.

One participant described this pattern as addition bias: “Always add things, never reward for abolishing” (P9.9).

5.2.3.1.3 Team as a driver for bottom-up innovation

Innovation in Agile contexts does not result from top-down directives, but from the expertise of teams when governance provides space for it. Teams in this research were motivated to develop solutions and drive improvements forward, provided that their suggestions were heard by governance steering bodies.

Participants reported successful bottom-up impulses: ideas emerged within the team, team members implemented them and connected with governance bodies when the climate was open to new ideas (P2.11, P2.18). The challenge is to ensure that this innovative power is not suppressed by administrative barriers. Too little structure can lead to uncontrolled idea development without clear need (P1.39), while too much formalism blocks experimentation. Governance must create space for operational expertise while providing mechanisms that make good ideas visible and enable them to be incorporated into project and organisational work.

5.2.3.2 External constraints as barriers to agility

Regulatory requirements, budget pressures and external dependencies restrict Agile practices. As a result, projects revert to more traditional control mechanisms.

5.2.3.2.1 Reduction of ambition through governance restrictions

If project governance can promote team innovation, it can also promote defensive behaviour through restrictions. Instead of striving for innovative solutions, teams focus on budget compliance, often at the expense of value creation. In scope discussions, one team contributed bottom-up innovation, which management rejected with reference to the budget. This represented a major area of tension in the project for many of those involved (P10.22), and Agile teams remained below their perceived potential. Instead of asking “what can we achieve?”, the focus became “what are we allowed to spend?”.

Particularly in connection with vendors, it became apparent that budget pressure was increasingly relevant and led to incomplete or even missing implementations (P10.23). This creates a paradoxical situation: while management launches projects with the ambition of creating modern, forward-looking systems, in the end only minimal process improvements are

achieved. Teams that aimed for state-of-the-art solutions had to gradually reduce their goals; in the end, the objective was simply “not to become worse than today” (P7.25).

However, when there were no critical budget restrictions, this could also increase the pressure on project teams to deliver results. One participant explained that the project outcomes always had to be good because of the budget provided (P6.20).

5.2.3.2.2 Budget pressure forces return to classical structures

Increasing budget pressure led governance mechanisms in many projects to move closer towards classical control logics. At the beginning of some transformations in this research, there was still openness to experimentation and bottom-up planning. However, as soon as financial targets tightened, new control instruments were introduced, such as additional approval steps, gating mechanisms or detailed scope boards. From a governance perspective, these instruments served to make costs and progress traceable, but at the same time they restricted team flexibility (P7.10) and tied up team capacity in servicing these instruments.

This return to classical patterns was also reflected in work package prioritisation. Instead of planning dynamically, governance steering bodies increasingly defined from the top “which products are to be delivered when” (P7.17), and governance became an instrument of cost control.

5.2.3.2.3 Planning uncertainty due to external dependencies

While requirement changes may be inherent to Agile projects, this research shows that Agile teams can reach a limit when dependencies within the organisation increase. One participant summarised this as follows: “In real life it usually turns out differently for certain reasons” (P12.53). Participants reported that the multitude of dependencies, particularly in international rollouts, led to recurring scope adjustments (P6.10) and that project teams regularly adjusted standardised rollout plans (P1.14).

While the coordination effort for all stakeholders increased, ambitious schedules further reinforced uncertainty within project teams. One participant explained that “project schedules are only achievable under perfect conditions” and are “always corrected backwards” (P1.24). These repeated shifts in objectives and deadlines, driven by governance steering bodies, caused teams to lose track of priorities and moved projects into an increasingly reactive mode.

Some participants saw early and clear segmentation of scope as a possible countermeasure (P7.30). This allows better control of individual parts, but as the size and complexity of the project increase, dependencies between segments also continue to grow.

5.2.3.3 *Trust-based governance mechanisms*

Transparent communication and demonstrable progress support trust between teams and management. Trust reduces the need for formal control and stabilises collaboration.

5.2.3.3.1 *Partial results create trust and reduce risks*

Early partial results create credibility with governance decision-makers. This reduces escalations and increases decision certainty. Participants emphasised that incremental delivery is a central success factor in Agile projects. Instead of delivering large outcomes only at the end, project teams broke down complex initiatives into manageable steps to make progress visible to steering boards. One participant summarised the principle succinctly: “You cannot fit the elephant into the fridge all at once” (P12.56).

This step-by-step delivery makes it possible to manage priorities in a targeted way and identify risks early. In practice, critical requirements are deliberately prioritised, while less central topics are consciously postponed: “critical things first, cosmetics later” (P2.6). This prioritisation creates transparency about actual project progress and builds trust between teams and management. Early testing and the possibility of reacting immediately to problems further reduce errors and improve the quality of results.

However, this approach requires reliable and traceable progress measurement and does not replace project reporting. When highly standardised reporting is agreed between governance actors, transparency and comparability can be ensured without reporting effort placing a burden on the team (P1.40).

5.2.3.3.2 *Trust through success communication*

Trust in Agile projects does not arise solely from reporting or governance processes, but through visible progress. Participants emphasised that regular demos and tangible interim results are important for involving management and sponsors. “We built up trust over time by doing these demos regularly – also for the management” (P11.60), one participant explained.

Success communication legitimises further investment. Several participants reported that progress communication influenced budget decisions. One participant described steering

meetings with sponsors that took place quarterly, during which the roadmap was confirmed and, where required, sponsors released additional budget to implement changes (P8.36).

Visible results and success stories therefore facilitate the release of additional funds. Project communication must increasingly be understood as part of the team's responsibility. One participant compared his role to that of a sales representative (P8.15). The ability of Agile teams to communicate progress effectively therefore becomes increasingly relevant. At the same time, it must be considered that trust only develops over a longer period through continuous success communication and tangible results. Only then are control interventions by governance bodies likely to decrease.

5.2.3.4 Understanding of agility

Limited experience with Agile methods creates uncertainty at both project and governance levels. Diverging interpretations of iterations and accountability shape how organisations perceive agility and conduct Agile approaches.

5.2.3.4.1 Agile inexperience and change management

Agile approaches still encounter limited experience in some organisations and introduce new roles, planning processes and decision structures. This can create double uncertainty in the project and the organisation. First, outcome uncertainty arises when target visions remain unclear or continue to change during implementation. One participant explained that it was important to "take away the fear of the project outcome" (P12.25), because unclear expectations and shifting priorities can lead to restraint and resistance. Even where teams cooperated well at working level (P11.19), tensions often occurred with management, which expected planning certainty and tangible results.

Second, methodological uncertainty arises through the unfamiliar Agile way of working. Organisations had to learn and practise new roles, processes and responsibilities. One participant described Agile projects as a means to "set impulses, change mindsets, heterogeneous teams" (P4.35). Although the novelty of Agile methods can initially motivate some organisations (P4.31), the ongoing challenge, not only for governance steering bodies, is to engage people and provide orientation. "Understanding people makes the rest easier – what motivation, where to pick them up, take them on the journey" (P8.20), one participant summarised.

External consultants can support this process, but they are not a substitute for internal change management. The accompanying effect of novelty and trust in these professionals can increase motivation within the project (P4.12), but this effect may be limited. Governance can therefore provide orientation in phases of uncertainty regarding project outcomes and methodology by securing roles, communication paths and decision spaces for change management.

5.2.3.4.2 *Management understanding of iterations*

A recurring pattern in several projects was that management levels primarily associated iterations with quick results. The expectation was to “react quickly to the market”, rather than to develop a stable product gradually (P11.1). Some participants viewed iterations not as consecutive learning and stabilisation phases, but as subprojects with the character of a product (P11.8).

This differing expectation can lead to conflicts in collaboration between sponsors and project teams, particularly when technically complex projects require a solid foundation based on sustainable IT architecture decisions (P11.17). One participant expressed understanding for this perspective, as “the client paid a lot, had legitimate expectations, iterative looked like delivering little” (P1.12).

To gain the trust of sponsors, another participant increasingly focused on ensuring that “early demonstrable results should build trust” (P2.14). In one project, however, this approach turned out to be paradoxical, as the initial demos showed stable foundations and management dissatisfaction grew (P11.14).

This illustrates that Agile approaches without a shared understanding of iteration lead to tensions in expectations, and that transparency regarding deliveries also has limits. The effectiveness of iterative approaches depends on sponsors’ understanding and on their active support of the approach, so that the development of technical foundations is not perceived as a waste of time (P11.17).

5.2.3.5 *Discussions on the influence of achieving digital transformation*

The themes show how the achievement of digital transformation in Agile projects relates to Research Question 3, which asks how the identified governance roles and practices influence the achievement of digital transformation in Agile projects.

Governance roles and practices unfold their influence when they establish clear boundaries and enable teams to take ownership of their work. In practice, governance and project actors are often placed under pressure by external factors such as budget constraints or increasing complexity. Nevertheless, trust and transparency remain key success factors: partial results, visible progress and open communication with sponsors create legitimacy and motivation. However, this requires a shared understanding of agility between teams and their sponsors or clients.

Remarkably, this research revealed that the classical project management triangle of time, cost and quality still serves as the main determinant of project success. Participants rarely mentioned Agile project-specific success criteria, such as customer value. The interviewed experts appeared to combine Agile methods with traditional control metrics that remain prevalent within their organisations.

In line with the literature, this study adopts a more differentiated understanding of project success. More recent approaches advocate a multidimensional understanding that also includes strategic contribution, organisational impact and user satisfaction (Ciric Lalic et al., 2022). Accordingly, the influence of governance roles and practices on digital transformation outcomes can be discussed through the five dimensions of project success proposed by Shenhar and Dvir (2007) and Ciric Lalic et al. (2022): project efficiency, impact on the team, impact on the customer, business success and preparation for the future.

When governance provides clear boundaries and fast decision-making channels, it directly enhances project efficiency. Teams reported higher productivity when they could make decisions without detours through middle management, while additional reporting cycles or frequent directional changes reduced operational effectiveness. This productivity also created space for bottom-up innovation, particularly when governance allowed teams to experiment and learn.

The impact on the customer became visible in projects with iterative delivery, where project teams delivered critical features early and in a usable form. Teams that prioritised according to business value reported higher customer satisfaction and greater transparency of progress.

Teams recognised business success mainly when progress was clearly communicated and budgets were released based on tangible results, as observed in successful QBRs. Under growing cost pressure, however, governance often reverted to classical gating mechanisms,

which provided short-term control but no perceived improvement in the achievement of project goals.

Preparation for the future appeared more implicitly. Regular retrospectives, lessons learned and knowledge exchange across project interfaces supported lasting adaptability at team level. Governance was most effective when it safeguarded these spaces for learning.

Because governance, particularly its roles and practices, is not a static construct but evolves dynamically throughout the project, the findings should also be interpreted in light of the moderating factors influencing project success, as described by Ciric Lalic et al. (2022).

The results show that governance mechanisms behave differently depending on the project context and framework. Governance in Agile projects is not a static control system but adapts to factors such as complexity and technical or financial uncertainty. In complex projects involving multiple teams, international rollouts or numerous interfaces, governance tends to become more formal. Decision paths lengthen, and coordination takes place through additional committees and governance roles.

In cases of technical uncertainty or high novelty, the importance of governance as a framework for orientation increases. Teams require clear priorities and aligned decisions on architecture and dependencies. Yet as uncertainty grows, governance becomes more restrictive and acts as a control mechanism, gradually limiting team autonomy and reducing agility to a label. Iterative delivery and incremental results therefore become important for ensuring transparency and giving decision-makers confidence that the project remains on track despite uncertain phases.

In strongly regulated or hierarchically structured organisations, such as those reported in the financial sector, this research surprisingly found that Agile working methods were firmly established and had evolved into continuous delivery models. Agile practices do not necessarily contradict traditional structures. New methods were integrated into existing approval and reporting systems to maintain traceability and control.

In projects characterised by high speed or tight timelines, one of the strengths of Agile approaches became evident. Governance proved most effective where quick decisions and short, informal communication channels with a limited number of stakeholders and decision-makers were in place.

In conclusion, Agile project governance that positively influences digital transformation is based on trust while still providing structure. Even during critical phases or periods of uncertainty, governance decision-makers should aim to maintain this balance by strengthening transparency of results where necessary, without burdening teams with excessive reporting. The particular challenge for governance steering actors is to withstand this uncertainty despite their financial responsibility for the organisation.

6 CONCLUSION

This research examined how project management professionals experience project governance in Agile projects within digital transformation contexts in Germany. Through 11 narrative interviews with experienced project management professionals, the study investigated how governance roles and practices influence project success in Agile environments.

The narrative approach allowed for in-depth insights that both extend the existing literature and provide a more differentiated picture of Agile project governance. The findings show how governance roles evolve over time, how governance practices become more restrictive depending on project status, and how governance is connected to a multidimensional understanding of project success in Agile and digital transformation settings.

Each of the following sections answers one of the research questions, drawing on the themes and subthemes derived in Chapter 5 and integrating them with the relevant literature established in Chapter 2.

6.1 ANSWERING RESEARCH QUESTION 1

What governance roles are experienced in Agile digital transformation projects?

The fundamental design of governance structures and roles depends strongly on the size and complexity of a project. In the single-team projects examined, governance structures appeared lean. Governance steering bodies made decisions at short notice while keeping communication paths to the team short. Agile principles therefore extended beyond project teams and shaped collaboration with governance steering roles.

Governance proved particularly effective when top management and sponsors were directly involved in project work. This required an understanding of Agile practices such as iterations. From the teams' perspective, informal and trust-based collaboration was the most effective form of engagement. Other cases showed that sponsors, in particular, acted as drivers of Agile approaches when they had positive prior experience, for example from other organisations.

While sponsors ensured decision-making capability, the PMO played an equally decisive role in the effectiveness of governance structures. As another central actor traditionally established in Waterfall environments, the PMO ensured transparency, stability and the standardisation of

governance requirements such as reporting. The combination of these roles created accountability within the steering process and translated strategic priorities into operational execution at project team level.

As project size increased, already visible when two or more teams were involved, governance structures became more hierarchical. The number of roles increased, and decision-making processes grew more complex. There was a risk that team autonomy decreased without necessarily improving perceived project quality. Governance bodies below sponsor level, often staffed by middle management, proved in several cases to be bottlenecks from the perspective of project teams. In these cases, the belief prevailed that an intermediary had to be present, which slowed decision-making when governance bodies were inadequately staffed.

The role of the PMOs remained relevant but evolved from a primarily supportive function towards a more controlling one, acting as an intermediary that ensured transparency towards higher governance levels.

In multi-team projects or programmes, additional governance roles increasingly emerged, acting as bridges between governance levels and functions. Various coordination positions, such as Tribe Leads, Stream Leads or project managers, assumed interface functions between teams, management and the organisation. In practice, these roles often compensated for deficiencies in processes or decision-making paths. When higher governance levels, such as steering boards, failed to ensure effective decision-making or acted too slowly, personal networks between project teams and line functions gained influence, shaping outcomes from outside formal governance mechanisms.

Beyond decision-making, further tensions emerged within the governance role structure, particularly where classical and Agile principles intersected. Business and IT units pursued different objectives, while projects and line functions competed for resources. The involvement of external service providers could also create friction. Contractual arrangements led to economic pressures or incentives that hindered effective integration into the project organisation and resulted in goal conflicts. Such tensions often weakened collaboration within governance systems and overrode governance arrangements.

In conclusion, governance in Agile projects continues to rely on traditional governance roles, but governance actors with an understanding of Agile principles perform these roles flexibly in relation to their actual responsibilities. Trust emerged as a key factor within governance itself,

while informal networks outside formal structures gained significant influence. Successful project managers in Agile settings therefore rely not only on methodological knowledge but also on situational adaptability.

Table 13 shows how themes and subthemes emerged from the coded narratives and how they relate to the study's main outcomes.

RQ	Theme	Contextual dynamic	Subtheme		Main outcome
Governance roles	PMO and Sponsors as central governance actors	PMO role evolves from primarily supportive in early/single-team phases towards more controlling and intermediating as project size and complexity grow. Sponsor involvement is effective when direct and trust-based, but tends to shift towards formality as projects scale or enter crisis mode.	1	PMO as an underrated key role	PMOs provide transparency and coordination that becomes critical as complexity grows
			2	Top-level sponsorship overcomes lethargy	Sponsors accelerate decisions through direct presence and commitment
			3	Collaboration between top management and project teams	Direct board-level prioritisation provides clear guidance
	Role conflicts and dependencies within the governance system	Conflicts intensify with project size and the addition of governance layers (especially middle-management bodies). Business–IT and project–line tensions become more visible under resource and goal pressure.	4	Discrepancies between theory and practice	Formal Scrum roles exist but practice adds new roles and middle layers as teams scale
			5	Resource conflicts between project and line functions	Partial team allocation leads to resource conflicts with line organisations
			6	Role conflicts between business and IT	Unclear responsibilities at the business–IT interface create duplicate structures
			7	Goal conflicts with external suppliers	Supplier profitability overrides project governance and quality requirements
	Limits of formal governance structures	Formal governance bodies lose effectiveness when they fail to make timely decisions and become bottlenecks. Project teams use informal networks to compensate formal structures, which accelerates under crisis conditions.	8	Governance elements with limited impact	Steering committees and frameworks add limited value when lacking decision and team connection
			9	Compensating structural weaknesses through individuals	Individuals create clarity and coordination when governance roles prove inefficient

Table 13: Findings related to RQ1

6.2 ANSWERING RESEARCH QUESTION 2

RQ2: What governance practices are carried out by project governance actors in Agile digital transformation projects?

Within this research, almost all Agile teams had the freedom to apply Agile practices to organise their work. These practices included daily stand-ups used for informal coordination

and the organisation of daily tasks. Agile frameworks served as guidance rather than strict instruction, while dogmatic interpretations of these frameworks were perceived as obstructive.

Hybrid working therefore represents the normal condition in Agile project practice rather than an exception. Rather than reflecting a binary choice between Agile and traditional project management, hybrid practice spans a broad spectrum in this study. Most participants reported that teams combined Agile methods with classical governance mechanisms to ensure stability, predictability and compliance. Here, governance did not act solely as a controlling authority but as a framework. Effective governance practices created clear boundaries within which teams could act autonomously. Secured resource funding, a clearly defined scope and short communication paths served as key foundations. However, these practices were affected by two factors: first, when projects entered and remained in crisis mode, and second, when increasing project size led to growing bureaucratisation of governance.

During perceived crises, triggered by deviations from planning or informal expectations, governance steering bodies frequently established task forces as additional monitoring and steering instances. These task forces assumed temporary control outside existing governance practices, leading to more centralised decision-making processes that operated in parallel with existing governance practices. These mechanisms reduced team autonomy, as decision-making became hierarchical, task-oriented and highly formalised. Although participants reported that projects could still be completed on time under such conditions, this research found no improvement in the quality of results, or the project scope was significantly reduced.

As projects increased in size, the degree of formalisation also grew. Reporting requirements became more extensive, while meetings with diverse documentation and reporting obligations created additional overhead for teams, often requiring new roles at team or governance level. At this point, perceived agility by teams turned into bureaucracy.

These developments led to increasingly limited decision-making spaces for teams. Governance reverted to classical command systems without producing measurable improvements in the underlying issues, such as quality deficiencies. Teams consequently lost autonomy. Agility shifted from a lived principle to a label. The interviews showed that governance maintained traditional control structures under the cover of agility.

Participants described that organisations which had already shifted from project-based structures to continuous delivery models had also transformed their governance practices. This transformation covered the entire delivery chain, from project initiation and business case

definition to regular reviews, such as QBRs, and secured annual funding cycles. When tools provide continuous transparency on project progress and decision-makers interpret these indicators effectively, reporting requirements can be reduced. However, achieving this state required transformation initiatives lasting up to 18 months in two cases in this research.

Overall, the findings show that organisations combine Agile team practices and traditional governance practices to balance stability, predictability and regulatory requirements. In this study, hybridity is not seen as a limitation of agility but as an expression of organisational adaptability. Value for project teams emerges where governance practices actively support iterative ways of working by establishing clear boundaries that safeguard decision-making freedom without interfering with team prioritisation. Governance functions as a system that provides both orientation and autonomy. What matters is that decision-makers, such as sponsors or clients, regularly define and review objectives and expected results, for example through QBRs.

Table 14 shows how themes and subthemes emerged from the coded narratives and how they relate to the main outcomes.

RQ	Theme	Contextual dynamic	Subtheme		Main outcome
Governance practices	Agile method selection and hybrid approaches	Agile aspirations are gradually compromised as compliance and reporting requirements grow, especially in multi-project settings.	10	Value contribution of Agile practices	Agile practices create value when they take context and organisational readiness into account
			11	Hybridity as the norm rather than exception	Pure Agile is rare as quality gates and classical planning persist alongside Agile frameworks
			12	Formalism in Agile practices	Agile ceremonies become mechanical rituals, and documentation replaces cross-functional collaboration
			13	Traditional reporting requirements in Agile projects	Regular reports and milestone focus persist due to steering committee needs
			14	Framework dogmatism blocks adaptability	Rigid framework adherence creates inflexibility and prevents teams from adapting to context
	Steering and escalation mechanisms	Governance shift towards greater control when projects enter crisis mode or when scaling adds coordination layers. Introduced task forces operate parallel to existing governance, leading to reduced team autonomy in the short term.	15	Governance guidelines define scope for action	Effective steering combines governance boundaries with informal escalation
			16	Escalation mechanisms	Escalations work through personal contacts and temporary task forces outside formal project structures
			17	Legitimate information obligations of Agile teams	Management's financial control is legitimate until it overrules sprint planning and team self-organisation
	Organisational integration enabling practices	Co-location, learning routines, and QBRs serve as critical stepping stones that drive the transition away from project-based steering toward a new delivery and governance model.	18	Cross-team coordination and scaling	Multiple teams require coordination roles for handling dependencies
			19	Effective collaboration through physical proximity	Co-location builds innovation and trust while distance creates coordination overhead
			20	Team-based and governance-driven learning	Learning through team-level lessons learned and governance-level QBRs
			21	Departure from project-based steering	Projects change into continuous initiatives requiring new governance approaches
			29	Trust through success communication	Regular demos and tangible results reduce management control interventions

Table 14: Findings related to RQ2

6.3 ANSWERING RESEARCH QUESTION 3

RQ3: How do these governance roles and practices influence the achievement of digital transformation in Agile projects?

As established in Sections 1.4 and 2.1.7, this study operationalised project success as the achievement of digital transformation (Chang & Chen, 2025), drawing on the multidimensional

view of project success proposed by Shenhar and Dvir (2007) and advanced by Ciric Lalic et al. (2022). The following findings therefore address how governance roles and practices influence the achievement of digital transformation.

This research showed that governance influences project success where it provides orientation, builds trust and enables team responsibility. Clear goal-setting and transparent decision-making processes supported team ownership. Teams reported that they were able to deliver their tasks more successfully when governance translated strategic priorities into understandable goals without prescribing operational decisions. In such contexts, innovation developed as teams used their scope for action to improve processes or test new solutions.

Scope for action within governance means that teams are given the autonomy to organise their work themselves and decide which priorities best serve the known goals of their clients. Within this research, Agile teams expressed their willingness to have their results reviewed regularly and considered this both reasonable and necessary in scope and frequency. A frequently mentioned practice was the QBR, in which every three months the project status was discussed with sponsors based on actual results rather than through abstract weekly reports. Where needed, decision-makers could agree measures concerning time or budget immediately. In this way, governance can help Agile project teams contribute directly to project success and make this contribution traceable.

However, enabling governance mechanisms lose their effectiveness when external constraints limit team autonomy. Budget pressure, regulatory requirements or increasing project complexity often lead to a governance fallback into traditional logics, while ambitious goals are reduced at the same time. According to participants, these ambitious goals have a motivating effect on Agile teams. The researcher observed that governance frequently reverted to traditional gate mechanisms, which provided short-term control for sponsors but led to no visible improvement in goal achievement from the teams' perspective.

In critical project phases where goal achievement is at risk, the findings suggest that organisations should not change the governance system entirely, but should continue relying on partial results, regular demos and transparent progress communication, with a higher frequency where necessary. Agile teams can maintain trust through visible results, keeping the need for formal control by sponsors to a minimum. In projects with direct customer or user involvement, participants also reported that iterative delivery focused on early business value had a positive impact on customer satisfaction.

A prerequisite for governance to positively influence project success is that sponsors, governance bodies and project teams share a common understanding of agility and Agile ways of working. While teams view iterations as phases of learning and development, management levels often expect quick results. Where mutual understanding exists and governance provides space for learning, teams use regular retrospectives and lessons learned and maintain exchanges across interfaces with other teams, strengthening collective knowledge. Governance can further support these learning processes by encouraging bottom-up innovation and integrating insights from process improvements into the governance framework. From the participants' perspective, this creates a positive influence on future projects and enhances the organisation's long-term adaptability.

Table 15 shows how themes and subthemes emerged from the coded narratives and how they relate to the main outcomes.

RQ	Theme	Contextual dynamic	Subtheme		Main outcome
Influence on the achievement of digital transformation	Factors influencing team autonomy and efficiency	Autonomy is highest when goals are clear and reporting is light, but is gradually declines as meeting and reporting demands accumulate without a specific event.	22	Scope for action through clear goals	Clear direction without implementation details creates team motivation through responsibility and purpose
			23	Meeting and reporting overload	Excessive meetings and reporting consume team capacity and create distrust cycles instead of transparency
			24	Team as a driver for bottom-up innovation	Operational team expertise drives innovation when governance provides space for ideas
	External constraints limit agility and reinforce classical control	Budget pressure, regulatory requirements, and dependencies outside the project trigger a return to traditional control mechanisms, which is observed at specific phase transitions, such as scope expansions.	25	Budget constraints reduce innovation and project outcomes	Budget reduces ambitious goals to minimal improvements
			26	Cost pressure triggers a return to traditional control	Budget pressure leads to additional approval steps, reducing governance to cost control
			27	Dependencies increase uncertainty and hinder prioritisation	Scope extensions and dependencies force projects into reactive modes
	Trust-based governance mechanisms	Trust between teams and governance actors builds incrementally through visible partial results and tangible delivery. Trust is fragile and can be quickly replaced by control practices in project crisis.	28	Partial results create trust and reduce risks	Incremental delivery of critical features creates stakeholder credibility through early testing and transparency
			29	Trust through success communication	Regular demos and tangible results reduce management control interventions
	Different agility views create tension and misalignment	Misalignment intensifies in early adoption phases and under pressure for quick market results. Governance demand shifts from orientation and role clarity towards supporting iterative learning.	30	Agile inexperience and change management	Uncertainty about outcomes and methods requires governance to provide orientation and role clarity
			31	Management understanding of iterations	Management expects quick market results rather than learning phases relevant for teams

Table 15: Findings related to RQ3

6.4 SYNOPSIS OF FINDINGS

This synopsis provides an overview of the main findings derived from the narrative analysis and presents the essence of the findings across the interviews. While the preceding sections examined each research question individually and presented relevant parts of the findings tables, this section provides a consolidated overview. Table 16 shows how themes and subthemes emerged from the coded narratives and how they relate to the main outcomes.

RQ	Theme	Contextual dynamic	Subtheme		Main outcome
Governance roles	PMO and Sponsors as central governance actors	PMO role evolves from primarily supportive in early/single-team phases towards more controlling and intermediating as project size and complexity grow. Sponsor involvement is effective when direct and trust-based, but tends to shift towards formality as projects scale or enter crisis mode.	1	PMO as an underrated key role	PMOs provide transparency and coordination that becomes critical as complexity grows
			2	Top-level sponsorship overcomes lethargy	Sponsors accelerate decisions through direct presence and commitment
			3	Collaboration between top management and project teams	Direct board-level prioritisation provides clear guidance
	Role conflicts and dependencies within the governance system	Conflicts intensify with project size and the addition of governance layers (especially middle-management bodies). Business–IT and project-line tensions become more visible under resource and goal pressure.	4	Discrepancies between theory and practice	Formal Scrum roles exist but practice adds new roles and middle layers as teams scale
			5	Resource conflicts between project and line functions	Partial team allocation leads to resource conflicts with line organisations
			6	Role conflicts between business and IT	Unclear responsibilities at the business–IT interface create duplicate structures
			7	Goal conflicts with external suppliers	Supplier profitability overrides project governance and quality requirements
	Limits of formal governance structures	Formal governance bodies lose effectiveness when they fail to make timely decisions and become bottlenecks. Project teams use informal networks to compensate formal structures, which accelerates under crisis conditions.	8	Governance elements with limited impact	Steering committees and frameworks add limited value when lacking decision and team connection
			9	Compensating structural weaknesses through individuals	Individuals create clarity and coordination when governance roles prove inefficient
Governance practices	Agile method selection and hybrid approaches	Agile aspirations are gradually compromised as compliance and reporting requirements grow, especially in multi-project settings.	10	Value contribution of Agile practices	Agile practices create value when they take context and organisational readiness into account
			11	Hybridity as the norm rather than exception	Pure Agile is rare as quality gates and classical planning persist alongside Agile frameworks
			12	Formalism in Agile practices	Agile ceremonies become mechanical rituals, and documentation replaces cross-functional collaboration
			13	Traditional reporting requirements in Agile projects	Regular reports and milestone focus persist due to steering committee needs
			14	Framework dogmatism blocks adaptability	Rigid framework adherence creates inflexibility and prevents teams from adapting to context
	Steering and escalation mechanisms	Governance shift towards greater control when projects enter crisis mode or when scaling adds coordination layers. Introduced task forces operate parallel to existing governance, leading to reduced team autonomy in the short term.	15	Governance guidelines define scope for action	Effective steering combines governance boundaries with informal escalation
			16	Escalation mechanisms	Escalations work through personal contacts and temporary task forces outside formal project structures
			17	Legitimate information obligations of Agile teams	Management's financial control is legitimate until it overrules sprint planning and team self-organisation

Influence on the achievement of digital transformation	Organisational integration enabling practices	Co-location, learning routines, and QBRs serve as critical stepping stones that drive the transition away from project-based steering toward a new delivery and governance model.	18	Cross-team coordination and scaling	Multiple teams require coordination roles for handling dependencies
			19	Effective collaboration through physical proximity	Co-location builds innovation and trust while distance creates coordination overhead
			20	Team-based and governance-driven learning	Learning through team-level lessons learned and governance-level QBRs
			21	Departure from project-based steering	Projects change into continuous initiatives requiring new governance approaches
	Factors influencing team autonomy and efficiency	Autonomy is highest when goals are clear and reporting is light, but is gradually declines as meeting and reporting demands accumulate without a specific event.	22	Scope for action through clear goals	Clear direction without implementation details creates team motivation through responsibility and purpose
			23	Meeting and reporting overload	Excessive meetings and reporting consume team capacity and create distrust cycles instead of transparency
			24	Team as a driver for bottom-up innovation	Operational team expertise drives innovation when governance provides space for ideas
	External constraints limit agility and reinforce classical control	Budget pressure, regulatory requirements, and dependencies outside the project trigger a return to traditional control mechanisms, which is observed at specific phase transitions, such as scope expansions.	25	Budget constraints reduce innovation and project outcomes	Budget reduces ambitious goals to minimal improvements
			26	Cost pressure triggers a return to traditional control	Budget pressure leads to additional approval steps, reducing governance to cost control
			27	Dependencies increase uncertainty and hinder prioritisation	Scope extensions and dependencies force projects into reactive modes
	Trust-based governance mechanisms	Trust between teams and governance actors builds incrementally through visible partial results and tangible delivery. Trust is fragile and can be quickly replaced by control practices in project crisis.	28	Partial results create trust and reduce risks	Incremental delivery of critical features creates stakeholder credibility through early testing and transparency
			29	Trust through success communication	Regular demos and tangible results reduce management control interventions
	Different agility views create tension and misalignment	Misalignment intensifies in early adoption phases and under pressure for quick market results. Governance demand shifts from orientation and role clarity towards supporting iterative learning.	30	Agile inexperience and change management	Uncertainty about outcomes and methods requires governance to provide orientation and role clarity
			31	Management understanding of iterations	Management expects quick market results rather than learning phases relevant for teams

Table 16: Synopsis of the findings

Building on the dynamics presented in Table 16, the following figure provides an abstracted visual representation of how governance influence factors shape project management approaches over time, while governance itself is not perceived as a static construct. The representation is therefore illustrative, as the projects in this study moved within these dynamics depending on their specific contexts.

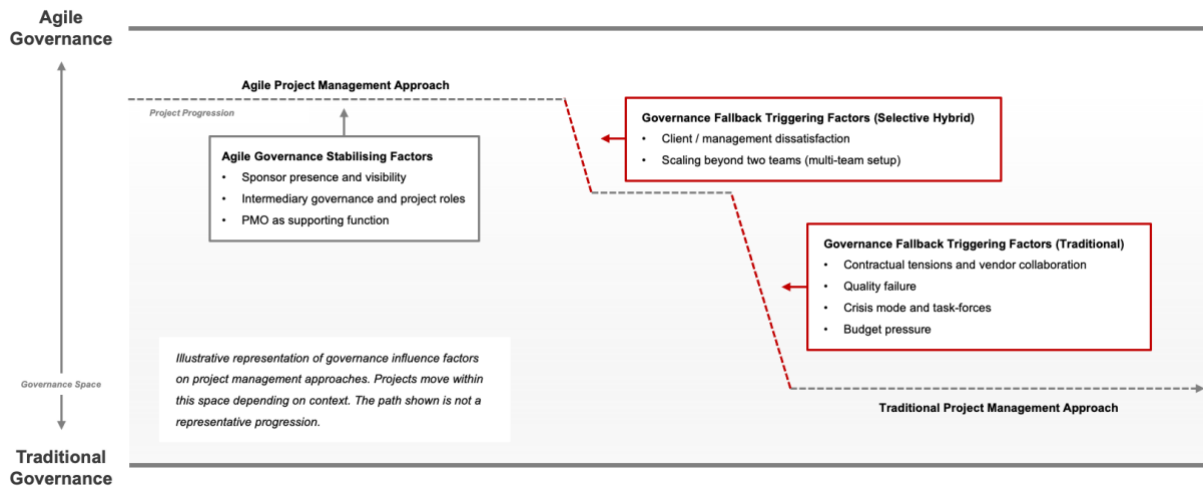


Figure 12: Governance dynamics and influencing factors (author's own)

6.5 REFLECTIONS ON RESEARCH DESIGN

The narrative design proved appropriate for collecting detailed accounts of project governance experiences from practitioners with very different professional backgrounds.

Initially, recruitment proved demanding. Confidentiality policies and uncertainty about what could be shared often limited employed participants in larger organisations. Since there was no direct benefit for participants, refusals were often the logical consequence. In retrospect, this showed that the effort required to recruit participants should not be underestimated. The researcher must also acknowledge that his own professional background as a project management consultant may have made recruitment more difficult. There was a risk that potential participants might perceive the study as a way to collect information about their company for future business activities.

The participants' career paths varied widely, ranging from project managers who had moved into leadership roles to project management consultants who had become coaches. As a result, each conversation developed differently. In some cases, it was necessary to provide more structure and guidance through questions, while in others the story unfolded more naturally. The pilot interview was particularly helpful in understanding this aspect.

At the same time, some challenges with the research design became visible. Certain parts of the narration required follow-up questions to focus explicitly on governance, as participants initially described practices in broader terms. This led to an important methodological challenge: questions must not be too closed or leading. In one instance, the researcher asked

whether projects had full autonomy, to which the participant simply confirmed the suggestion. This produced limited narrative value and demonstrated that overly closed questions restrict the richness of the account. Although the pilot interview made this weakness clear at an early stage, it took until the fifth interview to find an effective rhythm and to understand how to balance guidance with openness.

Furthermore, the researcher had to critically examine the distinction between projects labelled as Agile and those that actually followed Agile principles. Some narratives presented projects as Agile, but they did not in fact reflect Agile principles as described in Section 2.1.

A major challenge during analysis was forming suitable subthemes from 11 interviews without becoming lost in detail. The sensitising framework provided the necessary orientation and ensured that coding remained consistent and aligned with the research objectives. At the same time, it was challenging not to fall too strongly into the framework grid and select codes without sufficient reflection.

Overall, the narrative design ensured that participants' own project perspectives addressed governance aspects. It was not necessary to ask specifically for success factors in achieving digital transformation, as these became visible through the natural flow of the project lifecycle and phases of the narrated projects.

6.6 RESEARCH CONTRIBUTIONS

Building on the identified gaps presented in Section 2.5, this study contributes to the theoretical understanding of the interconnected areas of Agile projects, governance and project governance by connecting these fields through practical experiences drawn from 11 narrative accounts.

While this research confirms that formal governance structures remain present and that tensions between governance and agility persist, its primary contribution lies in revealing how governance operates dynamically in practice. This perspective has remained largely underexplored in current research. The study also validates that formal governance structures and mechanisms, including portfolios, programmes, steering boards and PMOs, remain present even in Agile projects (Müller, 2009; Too & Weaver, 2014). At the same time, they serve as important links between Agile projects and the wider organisation.

Furthermore, this research makes three distinct contributions to the understanding of governance in Agile projects in the context of digital transformation in Germany.

First, by confirming existing tensions in the literature, this study responds to recent research showing that organisations continue to experience tensions when aligning Agile delivery with traditional governance structures (Henriquez et al., 2025; Nyandongo & Khanyile, 2019). This study demonstrates that project complexity, interpersonal collaboration and informal networks are factors that shape governance systems or operate alongside formal governance structures. The findings reveal that intermediary roles emerge to translate between governance and Agile teams, while informal sponsor–team contact bypasses formal structures to enable faster decisions. This finding extends frameworks that describe formal governance positions (PMI, 2021; Too & Weaver, 2014) and aligns with research on project networks, where informal coordination practices complement formal structures (van Marrewijk et al., 2016).

Second, by extending the existing literature, this study addresses calls for empirical research on how governance roles adapt in Agile contexts (Lappi et al., 2018). The literature has remained largely structural, describing what governance roles are rather than how they behave. This research extends the static, traditional definitions of governance roles in two directions. First, it adds a behavioural and relational dimension to governance role analysis. The PMOs and sponsors identified earlier moved between supportive, intermediary and controlling functions depending on team maturity and project complexity, and sponsors combined agency-theory and stewardship-theory logics within the same project. Second, this study extends the role catalogue itself, as the intermediary roles identified in the findings emerged as compensating mechanisms where formal roles reached their limits and are not described in the established frameworks of Müller (2009) or Too and Weaver (2014). Beyond the role dimension, this study contributes to the operationalisation of existing Agile governance theory. The meta-principles proposed by Luna et al. (2016) operate at a high level of abstraction and have received limited empirical validation (Luna & Marinho, 2023).

This study provides practical insights into how the principles of appropriate governance, business orientation and people-centred governance unfold in Agile digital transformation projects. Similarly, Lappi et al. (2018) classified Agile project governance practices along the dimensions of Kujala et al. (2021) without providing empirical evidence on which practices are effectively applied. This study addresses that gap by showing which practices are associated with effective governance in Agile settings.

Third, this study contributes original insight into the dynamic shift between Agile and traditional governance. Luna and Marinho (2023) observe that governance in Agile settings remains insufficiently understood in research, while Taborda and Mohammed (2021) question the extent to which governance and agility are conceptually compatible. A central contribution of this study is to show that governance in Agile digital transformation projects is not static but moves dynamically between Agile-oriented and traditional control-oriented practices. Hybridity, understood as the field between Agile and traditional governance, can take a wide range of forms.

This study therefore challenges the position of conceptual incompatibility by showing that Agile and governance can be complementary rather than contradictory. The hybrid character of governance becomes more pronounced when more projects are involved: scaling beyond two teams introduces formalisation, crisis modes and task forces trigger a return to traditional control, and the larger and more critical the project, the stronger the tendency towards traditional governance. This tendency can be recognised in the German organisational context, where formalisation and uncertainty avoidance have been described as cultural characteristics (Brodbeck & Frese, 2008; Hofstede, 2001).

This dynamic shift also influences project success in digital transformation, understood as a multidimensional construct (Chang & Chen, 2025). The model by Ciric Lalic et al. (2022) contains several moderating factors, including project type, complexity, novelty and project pace, but does not consider the relationship between governance actors as a dimension relevant to success. This study shows that this relationship is a decisive factor. Direct sponsor presence within the project team and informal networks influenced decision-making, project pace, innovation and project outcomes. This research therefore extends the model by adding a relational dimension that is not represented in the existing moderating factors.

At the same time, the findings show that trust and collaboration operate independently of the formal governance structure. Regardless of how governance was formally defined, the quality of collaboration between governance actors and the project team proved relevant to project success.

In addition, this study contributes methodologically by providing an approach suited to capturing governance as it is experienced in real-world project contexts through narrative design. The sensitising framework structured the analysis, as shown in Figure 11. This framework demonstrates how the researcher managed subjective interpretations in a traceable way, resulting in comprehensible grounded themes and subthemes.

Taken together, these contributions provide novel, empirically grounded and practice-oriented insights into how governance functions, adapts and sometimes fails within Agile digital transformation projects in a German organisational context.

6.7 PRACTICAL CONTRIBUTIONS

The study provides critical insights and extends the practical understanding of governing Agile digital transformation projects for governance executives and project managers. It demonstrates how governance is implemented in real-world project settings, which roles and practices become relevant, and how conflicts emerge in practice. While the research identifies the essential roles and practices that form the foundation of Agile governance in the system, it also supports organisations in understanding, implementing and adapting governance systems for their digital transformations.

The study highlights for executives and sponsors that governance changes in situations of conflict or deviation from targets. In these situations, traditional governance practices dominate and override Agile ways of working. This insight helps governance decision-makers reflect on whether their practices contribute to project success or whether they merely create the appearance of transparency, for instance through extensive reporting or interventions in planning.

Based on the main outcomes of this study, the researcher derives the following short-term practice-oriented recommendations for executives as governance decision-makers:

- Reporting and information requirements should be aligned jointly with teams, bundled through the PMO and translated into formats that support delivery rather than create additional pressure on teams.
- The PMO should manage dependencies between project teams, consolidate information on progress and risks, and support governance-level decision-making without acting as a controlling instrument towards project teams.
- Executives are advised to enable direct alignment with project managers to resolve critical issues more quickly. Governance should focus on clear prioritisation and goal-setting, while avoiding detailed intervention in operational plans if agreed objectives and financial boundaries are respected.

From a medium- to long-term perspective, governance executives can place digital transformation projects on a new governance foundation:

- Clarification of roles and decision rights at the business–IT interface reduces parallel governance structures and recurring conflicts. If Agile projects develop into continuous and long-term endeavours, organisations are encouraged to move beyond purely project-based governance steering.
- Central governance-level formats, such as QBRs, can help reduce meeting and reporting overload by integrating the information and decision-making needs of teams and governance decision-makers.

The findings also offer practical orientation for project managers on which practices align with governance principles and which contradict them. Project managers can use this understanding to assess how their actions at team level influence governance responses. For project managers, short-term action should focus on operating effectively within existing governance constraints:

- Where formal escalation paths do not lead to timely decisions, the use of informal escalation through personal contacts can be a functional and legitimate element of governance in practice.
- Project managers should establish and protect learning formats at team level, such as regular retrospectives and structured lessons learned sessions. Even under strict governance conditions, learning needs to be safeguarded as a prerequisite for adaptability, quality and sustainable project outcomes.

In the medium to long term, project managers are encouraged to adopt a broader perspective beyond their own projects. For instance, they should make dependencies across teams visible and actively address coordination needs as teams scale, working together with governance functions such as the PMO.

In light of the limited success of digital transformation initiatives reported across multiple companies in Germany, as introduced in Section 1.1, this research derives medium- to long-term recommendations for business owners and top managers operating above the project governance layer at the strategic level. These recommendations extend the study's findings by translating the observed patterns into implications for strategic leadership:

- Executives should allocate dedicated time to removing organisational impediments that governance and delivery teams cannot resolve on their own. Decision-making bodies should be staffed with individuals who hold the mandate and authority to make binding decisions, so that governance accelerates progress rather than delaying it. This requires an active mandate for decision-making rather than a governance title.

- In complex digital transformation settings, long-term and fixed planning can create a sense of certainty that is not matched by project reality. In the narrative accounts, project teams demonstrated progress best through results that built trust, while scope adjustments could be treated as a necessary sign of adaptation. Reporting and planning remain necessary, but they should be closely tied to results.

6.8 TRANSFERABILITY OF THE FINDINGS

Readers should view the findings in this study as context-specific insights derived from Agile digital transformation projects in Germany. They can inform similar environments but should not be generalised.

As the study is grounded in German project settings, transferability is shaped by the organisational conditions discussed in the introduction, including high levels of formalisation and structured decision-making. Germany scores highly on uncertainty avoidance (Hofstede et al., 2010). The GLOBE study similarly describes German organisational practices as emphasising planning and documentation procedures (Brodbeck & Frese, 2008). In Agile digital transformation settings, the organisations reflected these practices through demands for long-term project planning, formalised approval meetings and documentation. It therefore remains uncertain to what extent the findings can be transferred to countries with different cultural settings and organisational norms. It is important to distinguish between the German national setting of the projects and the personal backgrounds of the governance actors and interview participants. The nationality of governance actors did not play a role in the accounts.

The complexity and size of the projects also influence the applicability of the results. This research focused on Agile digital transformation projects that involved software-based delivery within broader transformation settings. The level of governance required may vary depending on project type, size and organisational experience with Agile approaches. Readers should therefore consider carefully the transferability of these findings to other project domains beyond digital transformation.

In addition, the findings reflect project environments characterised by multiple governance layers and established PMOs or supportive line functions, such as centres of competence. Vendor settings, which characterised most projects in this research, also shaped governance. In these settings, vendor contracts formed part of the governance context and influenced how governance was applied in practice. In purely internal project settings without external

vendors, organisations may apply governance differently, as contractual requirements are less central.

Project teams adapted the Agile methods described in this research to their specific project environments. These methods did not reflect textbook definitions of frameworks such as Scrum at project level. In some narratives, Agile primarily referred to the degree of autonomy and freedom available at team level. In other cases, the narratives showed that governance interventions shaped project management approaches over time. These interventions altered Agile ways of working in practice. The transferability of the findings is therefore limited to comparable contexts, and caution is required when applying them to settings with more formal or prescriptive framework implementations.

6.9 LIMITATIONS AND FURTHER RESEARCH

The narrative design chosen for this study enabled a detailed understanding of governance systems as experienced by project management professionals, while also defining methodological boundaries. The narrative accounts are subjective and context-bound. They represent individual interpretations shaped by memory, interaction and professional perspective. Although the researcher applied reflexivity, the co-construction of meaning between researcher and participant in the narrative space may have introduced researcher bias. The findings are grounded in Agile digital transformation projects in German companies. Readers should therefore consider whether their own context shares similar characteristics before applying these insights. Agile projects in other domains, such as infrastructure or regulatory initiatives, may involve different governance dynamics.

Furthermore, the approach focuses on patterns of meaning and experience rather than measurable cause-and-effect relationships. The findings reveal how project governance is experienced in practice but cannot establish direct causal links or generalisable conclusions between project governance and the achievement of digital transformation. However, these limitations give rise to several valuable directions for further research.

This study provides an initial, differentiated overview of how Agile projects are governed in German companies. Further research could build on these findings by exploring how governance dynamics differ across industries and organisational environments, and how cultural and contextual factors shape governance structures and practices in Agile settings.

The development of governance over time also requires deeper investigation. Future studies could analyse which factors trigger shifts in governance structures and practices, identify possible tipping points, and explain why organisations tend to revert to traditional control mechanisms during moments of uncertainty or conflict.

Another relevant area relates to the general understanding of Agile approaches among governance decision-makers and how this influences their decision-making. Exploring how these perceptions differ between executives, PMOs and project managers may also offer valuable insights. Further research should also examine the collaboration between governance decision-makers and Agile project teams. In particular, understanding the communication needs and collaboration models that enable effective interaction between these actors could reveal how governance can support the achievement of project goals.

6.10 PERSONAL REFLECTION

I consider myself an experienced project manager with extensive knowledge of Agile methods. Only later in this research did I realise that I was, in fact, conducting an Agile project myself. The uncertainty about the outcome, the incremental progress and the repeated adjustments throughout the process reflected much of what I know from Agile project environments.

It took time to accept uncertainty as an integral part of the process and to recognise that developing this work iteratively was itself a process. By the time this insight had matured, I had already spent several months on the literature review without a clear sense of when a sufficient basis had been established. Eventually, I decided to move forward, defining a point at which to begin designing the research while retaining the flexibility to integrate new insights into the review whenever relevant connections emerged.

This way of working also strengthened my personal resilience. The long and sometimes discouraging phases, particularly during the literature review, where progress was difficult to measure and directions required revision, demanded patience and persistence. I learned to work with both curiosity and discipline, two qualities that reinforced each other as the project advanced, especially during the interview phase. In retrospect, I came to see that research is not only analytical but also creative. I had to make decisions before all information was available, creating a process shaped by intuition and adaptation.

Completing this work marks the end of a long journey shaped by uncertainty and continuous learning, while also opening a new phase in which these experiences form the foundation for

future research and professional practice. The realisation that complex undertakings can never be fully planned but become successful through adaptation and clear direction continues to shape my understanding of projects in both theory and practice.

The insights I gained through this research are also connected to my interview participants. Each conversation offered new impulses and perspectives that helped refine my understanding. The university provided the necessary resources, and my supervisors struck the right balance between allowing freedom and setting boundaries when needed. In hindsight, I understand them, and the academic environment around me, as a form of governance for this Agile research project. This experience helped me understand what effective governance means to me.

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Transparency Notice

In accordance with the University of Worcester's Position Statement on the Use of Generative AI Tools in Teaching, Learning and Assessment (2024), AI-supported tools were used during the preparation of this thesis: Microsoft Teams generated automated transcriptions of the interviews. All transcripts were subsequently reviewed and corrected manually to ensure accuracy.