

Change Note

for the update of the PM²-PfM Guide from v1.5 to 2025 Edition

The improvements presented below are based on:

- Feedback from the participants of the PM²-PfM trainings (EU Learn) and the PM² CoP.
- Feedback from the stakeholders from DIGIT's and corporate portfolios
- Inputs from the stakeholders from EU Institutions.
- Methodology Office findings, corrections, and the need for alignment with new methodologies.

Highlighted Updates

Updates on the Model

- **Expanded Process Model:** The methodology evolved from four to five core processes, introducing a dedicated Portfolio Monitoring & Controlling process.
- **Streamlined Framework Definition:** Four activities are replaced by three outcome-focused ones: From [Define Portfolios, Define Portfolio Governance, Define Portfolio Processes, Define Framework Reviews] to [Define Objectives & Characteristics, Define Management Approach, and Review Framework].
- **Enhanced Portfolio Realisation:** A new activity (Manage Strategic Alignment) ensures continuous portfolio-strategy fit through structured review and stakeholder engagement.
- **Dedicated Monitoring & Controlling:** Formerly an activity of the Realisation process, it is now a standalone process comprising 5 activities, including 2 new activities for Manage Quality and Manage Lessons Learned.
- **Refined Stakeholder Engagement:** Process renamed to Stakeholder Engagement & Communication, and Report Portfolio Performance was moved under Monitoring & Controlling.
- **Simplified Governance Structure:** The Portfolio Steering Committee (PfSC) is retired, and its responsibilities are mainly moved to the Portfolio Directing Group (PFDG), empowering the Portfolio Manager (PfM).
- **New Advisory and Liaison Roles:** The Portfolio Advisory Committee (PfAC) and Component Representative (CR) roles are introduced to strengthen cross-functional advice and component alignment.
- **Updated Responsibility Model:** The RASCI model becomes D-ARSCI, adding explicit decision authority and clarifying accountability of the portfolio activities.

Updates on the Publications

- **Updated the PM²-PfM publications** by optimizing the processes and activities definitions and descriptions, the governance, artefacts and mindsets. Implemented updates to enhance the structure and the flow of information and the reading experience.
- **Aligned PM²-PfM 2025 Edition** with the rest of the **methodology suite**, including **compliance** to the **Accessibility Requirements** and **PM² branding and visual styles**.
- Update the **copyright statement** to be aligned with the EC's standard CC BY 4.0 license
- **Implement corrections of mistakes and omissions from the Guide v1.5.**
- **Align PM²-PfM with the Digital Solution Management Framework (DSMF)**