ASPECTS ANALYSIS OF SYNCRETIC PROJECT MANAGEMENT METHODOLOGY IMPLEMENTATION IN SELF-MANAGED ORGANIZATIONS PROJECT ACTIVITIES

Abstract. The article is devoted to the analysis of project aspects of the implementation of the syncretic project management methodology in the project activities of self-managed organisations. The stages of development of the direction of implementation of project management methodologies and standards in practical activity are analysed, and five such stages are distinguished. The analysis of three main components of the syncretic methodology implementation project - organisational component, management component, and instrumental component - was carried out. The analysis of the organisational component was carried out about the following entities: the type of organisational structure, the composition of the project team for the implementation of the syncretic approach, and the competencies of the members of such a team. The composition of the team for the implementation of syncretic management in the activity of a project-oriented organisation is proposed, and the profiles of each role are given (project manager, coordinator of implementation and integration of elements of self-management, methodologist of syncretic management, IT specialist). The analysis of the management component was carried out about the following entities: implemented methodologies within the syncretic system, models of self-managed team management, and models of project offices. An example of the syncretic management model, which was implemented to manage a portfolio of infrastructure restoration projects in Ukraine, using three methodological approaches within the syncretic system – PMBOK-based methodology, PRINCE2-based methodology, and Ichak Adizes organisational development methodology is given. The analysis of the instrumental component was carried out about the following entities: the IT ecosystem supporting syncretic management; the possibility of implementing algorithms of interfaces between component methodologies and the syncretic core; and instrumental implementation of the communication environment. In this context, the possibilities, advantages and disadvantages of four types of IT tools (ecosystems) are analysed. A generalized SWOT analysis of the proposed approach was also conducted. Prospects for further research in the chosen direction are outlined.

Keywords: project and program management, syncretic methodology, self-managed teams, methodology implementation project

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АНАЛІЗ АСПЕКТІВ ВПРОВАДЖЕННЯ СИНКРЕТИЧНОЇ МЕТОДОЛОГІЇ УПРАВЛІННЯ ПРОЄКТАМИ В ПРОЄКТНУ ДІЯЛЬНІСТЬ САМОКЕРОВАНИХ ОРГАНИЗАЦІЙ

Анотація. Стаття присвячена тематці аналізу аспектів проектів впровадження синкретичної методології управління проектами в проектну діяльність самокерованих організацій. Проаналізовано етапи розвитку напрямку впровадження методологій і стандартів управління проектами у практичну діяльність, виокремлено п’ять таких етапів. Проведено аналіз трьох основних складових цього проекту: організаційної, управлінської та інструментальної. Аналіз організаційної складової здійснено щодо таких сутностей: тип організаційної структури, склад команди проекту впровадження синкретичного підходу та компетенції учасників такої команди. Запропоновано склад команди впровадження синкретичного управління у діяльність проектно-орієнтованої організації, наведено профілі кожної ролі (керівник проекту, координатор впровадження і інтеграції елементів самокерованості, методолог синкретичного управління, ІТ фахівців). Аналіз управлінської складової здійснено щодо таких сутностей: впроваджувані методології в межах синкретичної системи, моделі управління самокерованою командою, моделі проектних офісів. Наведено приклад моделі синкретичного управління, що була впроваджена для управління портфелем проектів відновлення інфраструктури України, з використанням
Introduction. Modern challenges facing Ukraine, caused by the armed aggression of the Russian Federation and significant destruction of infrastructure, require the implementation of large-scale restoration projects and corresponding portfolios of projects. The extreme importance of such projects is emphasized at the highest level of state administration in Ukraine [1].

On the other hand, such projects require the use of a unique implementation methodology, which would take into account the specifics of these projects – requirements for quick implementation, simultaneous compliance with high requirements for the quality of project products, ensuring the possibility of effective participation in restoration projects by participants (stakeholders, contractors) with their own project culture management and modern management models, etc. As such a methodology, the authors proposed a syncretic project management methodology for use primarily by project-oriented organizations with elements of self-management [2].

At the same time, the issue of implementing individual elements of the syncretic project management methodology has so far been overlooked. Therefore, the purpose of this article is to conduct an analysis of the features that arose during the implementation of the syncretic project management methodology in the project activities of self-managed organizations. The field of implementation was chosen as the field of infrastructure restoration projects of Ukraine, as one of the practically significant and important fields of ensuring the stability of the economic system of Ukraine against the background of the ongoing aggression of the Russian Federation against Ukraine. Therefore, the topic of this study can be considered relevant.

Review of literary sources. The implementation of project management methodologies or standards during the development of project management as a scientific and practical separate direction of research can be divided into five separate stages. We will describe the identified stages in connection with the relevant studies.

The first stage of "Dominance of PMBOK" took place at the beginning of the development of project management as a separate discipline and is associated with the predominant use of the PMBOK standard of the American Project Management Institute PMI (which is also an international association for project management). Within this stage, it was the PMBOK standard that formed the basis of the corporate project management system for organizations that were just making the transition to project orientation in their activities. This stage led to the conclusion that PMBOK in its pure form cannot become the basis of a corporate system, which led to the consistent development of the standard itself, resulting in its latest seventh edition [3]. In this edition, in response to the challenges described above, the concept of tailoring appears as a process of fitting (adapting) the PMBOK standard to the conditions of a specific project-oriented organization, models and methods of such tailoring are provided.

The second stage of "Multiple Standards" was associated with the rapid development of project management as a personified discipline. During this stage, standards appeared, issued by other organizations in different countries. For example, the PRINCE2 standard, developed and supported by the UK government. This standard originates from the IT industry, but it is adapted to projects of various types (not exclusively IT, as will happen with the Agile methodology in the future), it is constantly updated and adapted to modern conditions. In particular, the latest edition is the seventh [4], it is still mandatory for the management of public projects in Great Britain, but it is also used by others, in particular UNDP. One of the iconic classes of standards that have appeared in the field of project management are the standards for the necessary competencies in the field of project management. An example of such standards is the standard of the international association of project management ICB (Individual Competence Baseline) [5], where the competencies of project managers are divided into three clusters – requirements for specialists ("People"), requirements for practical skills ("Practice"), requirements for strategic planning ("Perspective"). The implementation of such standards also does not take place literally, they require significant adaptation to the conditions of the organization, the initiation of an implementation project and the involvement of experienced specialists for this.

The third stage of "Standards of multi-project management" began in connection with the
realization by project-oriented organizations of the fact that development tasks are difficult to solve with the help of individual projects. Instead, their aggregates (portfolios of projects, programs) and corresponding standards appeared. Among the examples of such standards, it is worth highlighting The Standard for Portfolio Management of the American Institute PMI [6], which, based on the generalization of the experience of practitioners, formulates models and methods of managing a set of projects that are not connected by common goals (portfolio). Among the examples of program management standards, where projects are connected by a common goal or mission, it is worth noting the P2M standard of the Project Management Association of Japan (PMAJ) [7]. A distinctive feature of this standard is, among other things, that it introduces the concept of value and value management into project management for the first time. However, the adaptation of this standard requires greater efforts from the teams of the respective projects, since the standard reflects the unique features of the respective mentality.

The fourth stage "Agile Methodology" began to unfold with the appearance of this methodology [8] and occurred due to, at first, its exclusive use in individual projects of the IT industry, then in the vast majority of IT industry projects. Over time, the use of the Agile methodology began to spread beyond the IT industry, and its individual elements began to be increasingly added to corporate project management systems of other industries. This may have been facilitated by the comprehensive digitization of processes and systems, which is a global trend in enterprises, regardless of their industry. However, it is worth noting that the introduction of Agile elements into the project management system of enterprises began to require even greater efforts and a greater number of competencies – both in the field of project management and in the field of Agile application, as well as in the construction of effective combined project activity management systems. This caused the transition to the next stage, which mostly occurs in modern project-oriented organizations.

The fifth stage "Hybridization of methodologies" is associated with the use of not one standard or methodology, but their combination, in the corporate project management systems of project-oriented organizations. And although the concept of such a combination was described by classic authors [9], the beginning of this stage can be associated with the creation of methodological mixes of the Agile methodology with one of the classic standards [10]. This is how the methodological combinations of Agile+SMMI, Agile+MSF, DSDM+PMBOK, etc. arose. The hybridization of methodologies is considered as a separate branch of research, both applied (in the case of infrastructure projects, which is also the subject of our research) [11], and theoretical, related to the construction of strategies on the appropriate methodological basis [12].

As for the very implementation of project management methodologies or standards, this issue has been the subject of research by many scientists. In particular, the work [13] considers the approach of using different methodological approaches (standards and methodologies) in the context of the implementation of regional development projects. In another work [14], the multiplicity of models of the life cycle of project teams is considered, from which it is possible to conclude about the multiplicity of applicable methodologies or standards for project management. In another large-scale study [15], in particular, the correlation between the planning of project actions and the actual implementation of projects is considered, from which conclusions can be drawn regarding the effectiveness of the implementation of project management. As interesting studies on the implementation of project management standards, it is also worth noting work [16] on general aspects of implementation, work [17] presenting the results of implementation in the Czech Republic, work [18] on researching the work of project management offices, which is also interesting from the point of view from the point of view of the implementation of project standards, and, finally, the work [19], which considers approaches to the implementation of project management in the context of ecosystems used by project-oriented organizations. Finally, syncretic management approaches aimed at combining different methodologies within one project or portfolio are further developed by the authors, in particular in the context of modeling processes of such management [20].

In general, it should be noted that the direction of implementation of syncretic management, as a specific class of hybridized project management methodologies, has not been researched enough, which additionally confirms the relevance of the topic of this article.

**Research methods.** In this study, general scientific methods of analysis and synthesis, systems theory and a systematic approach for decomposition of the general task into subtasks, organizational planning theory for the development of organizational structures, project management theory for analyzing the results of the implementation of syncretic methodology in the restoration project management system, syncretic management methods for the development of syncretic approaches in the context of the studied projects, the method of SWOT analysis for the general characteristics of the conducted research.
Research results. We will conduct an analysis of aspects of the implementation of syncretic methodology in the activities of self-managed project-oriented organizations participating in infrastructure restoration projects of Ukraine. The specified analysis is proposed to be carried out according to the following aspects:

- Analysis of the organizational component of the syncretic methodology regarding the implementation of organizational models and methods;
- Analysis of the management component of the syncretic methodology regarding the implementation of management models and methods;
- Analysis of the instrumental component of syncretic methodology regarding the implementation of IT tools and algorithms for the implementation of syncretic methodology methods;
- Generalized SWOT analysis of the implementation of syncretic methodology in the activities of project-oriented self-managed organizations;

Analysis of the organizational component.

The consideration of the organizational component will be carried out in relation to the following entities: the type of organizational structure, the composition of the project team for the implementation of the syncretic approach, and the competence of the members of such a team.

Regarding the type of organizational structure, it can be considered that for project-managed organizations it is possible to recommend an organizational structure "under the project" or a "virtual team" structure (in the latter case, team members can be geographically dispersed, but work in a virtual environment on one project or a portfolio of projects). For project-oriented organizations, a strong matrix structure should be considered the best option of the organizational structure for the implementation of syncretic management. The justification for such a choice is the presence of a project management office (PMO) in such a structure, which will organizationally implement the function of the core of the syncretic methodology – that is, it will deal with the organization of processes and the implementation and support of the necessary tools to ensure the isolated use of each separate methodology in separate parts of the project (individual projects of the project portfolio). In this way, it will be possible for self-managed teams managing parts of the project (projects of the project portfolio) to use a methodology specific to them, familiar to them, tested by them, and convenient to them. Whereas the interfaces between the parts of the project (the projects of the project portfolio) will be provided by the project office of the project-oriented organization.

At the same time, the composition of the team for the implementation of syncretic management in the activities of a project-oriented organization that uses elements of self-management of teams can be proposed as follows:

- head of the implementation project (project manager);
- coordinator of implementation and integration of self-management elements;
- methodologist of syncretic management;
- IT specialist in implementation of methodologies interfaces and organization of IT ecosystem of syncretic management.

The profiles of such specialists, indicating the requirements for the persons who will occupy the role and the main functions of the role, are given in the table 1.

Thus, the syncretic methodology implementation project management team must meet the criteria for the hard skills of each team member. In addition, soft skills are also important, in particular the ability for effective team interaction, professional conflict management and the ability to work successfully in a team. Also important in this context (although not decisive) is the awareness of the members of the project team (or at least the project manager) in the peculiarities of the functioning of the subject area in which the project-oriented organization implements its activities.

Table 1

<table>
<thead>
<tr>
<th>№</th>
<th>Role in the project</th>
<th>Requirements for the person who will occupy the role</th>
<th>Main functions of the role</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Project manager</td>
<td>Project management experience; Strong communication skills; Organizational abilities; Innovative thinking</td>
<td>Ensuring the achievement of project goals; Project team management; Communication with stakeholders</td>
</tr>
<tr>
<td>2</td>
<td>Coordinator of implementation and integration of self-management elements</td>
<td>Project activity experience; Work experience in self-managed organizations; Strong communication skills;</td>
<td>Ensuring the achievement of self-management by project teams; Communication in teams;</td>
</tr>
</tbody>
</table>
Innovative thinking | Learning models and methods of self-management

Team members profiles of the syncretic management implementation project

<table>
<thead>
<tr>
<th>№</th>
<th>Role in the project</th>
<th>Requirements for the person who will occupy the role</th>
<th>Main functions of the role</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Methodologist of syncretic management</td>
<td>Mastery of project management methodologies;</td>
<td>Implementation of syncretic management methodology;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Experience in using methodological hybrids;</td>
<td>Support for the integration of the methodology into the corporate management system;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Innovative thinking</td>
<td>Training of team members</td>
</tr>
<tr>
<td>4</td>
<td>IT specialist</td>
<td>Experience in the integration of IT systems;</td>
<td>Implementation of IT components of syncretic methodology;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Experience writing macros;</td>
<td>Software implementation of interfaces;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Participation in projects (will be an advantage)</td>
<td>Customization of the corporate IT system (based on the selected ecosystem)</td>
</tr>
</tbody>
</table>

**Analysis of the management component.**

We will consider the management component in relation to the following entities: implemented methodologies within the syncretic system, models of self-managed team management, models of project offices.

An example of a model of syncretic management, which was implemented to manage a portfolio of infrastructure restoration projects in Ukraine, is shown in Fig. 1.

In the given example, three methodologies were used - the first, based on the use of the PMBOK standard, the second, based on the PRINCE2 methodology, and the third - the organizational development methodology of Ichak Adizes. The portfolio of restoration projects included projects that used one of the three mentioned methodologies in their own management system. Therefore, the core of syncretic management had to interpret the managerial influences from the portfolio management team to the project management teams in the language of models and methods of each methodology used by the projects. And vice versa - information about the progress of the projects had to be interpreted by the portfolio management system based on the knowledge of the peculiarities of the management methodologies of all projects. So, the bidirectional interface worked. One of the well-known IT ecosystems was used as an IT system. The organizational component that was implemented is listed above in the "Analysis of the organizational component" section.
Fig. 1. An example of implemented syncretic management model

Models of self-managed team management that can be used in a syncretic methodology implementation project can be conditionally divided into three classes: teams using individual elements of self-management (hierarchy is preserved), project portfolio management in conditions of use of self-managed teams by individual projects (hierarchy is partially preserved), system management contains only self-managed teams. The first model was used in the implementation of the syncretic methodology, which took place within the framework of the restoration project management system. The results of the implementation of the methodology made it possible to create prerequisites for the transition to the second model. It is worth noting that later there may be an opportunity for the transition of the studied project-oriented organization to the third model, subject to further improvement of the management system.

The models of project offices that can be used in a project to implement syncretic management can be the following (according to one of the standard classifications): "weather station" that informs the management of the organization about the progress of project implementation without interfering with project management; "resource pool" that provides the right resources to the right projects at the right time; "control tower" that directly manages projects; "strategic program office of project management", which ensures the connection of strategic management (approved strategic plan) with current project activities. In the researched project-oriented organization, given the specifics of the researched projects (infrastructure restoration projects), the project office was implemented in the form of a "weather tower". That does not negate the use of other models of project offices when implementing syncretic management in other organizations. Both the specifics of such organizations and the specifics of the project office model chosen for implementation must be taken into account.

Analysis of the instrumental component.

We will consider the instrumental component in relation to the following entities: IT ecosystem supporting syncretic management; the possibility of implementing algorithms of interfaces between component methodologies and the syncretic core; instrumental implementation of the communication environment. A summary of the analysis of possible implementations of the instrumental component is given in the table. One of the possible implementations of the instrumental component is also the ecosystem of the Apple company, however, its application is characterized by certain features, therefore it requires a separate study, and therefore the specified ecosystem was not included in our analysis and may be identified as the perspective of further research in the chosen direction.

Table 2

Analysis of possible implementations of the instrumental component of syncretism
<table>
<thead>
<tr>
<th>№</th>
<th>IT ecosystem</th>
<th>General possibilities of syncretism</th>
<th>Implementation of interfaces</th>
<th>Communication environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Microsoft 365 ecosystem</td>
<td>OneDrive storage, tracking versioning and changes in documents; Other Microsoft 365 tools</td>
<td>Excel 365 macros; Access 365 requests; Other Microsoft 365 tools</td>
<td>Outlook mail; Planner board; Skype; Other Microsoft 365 tools</td>
</tr>
<tr>
<td>2</td>
<td>Google ecosystem</td>
<td>Google Drive storage, tracking versioning and changes in documents; Other Google tools</td>
<td>Google Sheets Macros; Google forms; Other Google tools</td>
<td>Gmail; Google Meet; Google Calendar; Other Google tools</td>
</tr>
<tr>
<td>3</td>
<td>EPR system (for example SAP)</td>
<td>A wide range of functionality that describes the processes of the organization (usually requires individual customization)</td>
<td>Requires additional development of own add-on</td>
<td>Built-in ERP communicator</td>
</tr>
<tr>
<td>4</td>
<td>The company's own development</td>
<td>The functionality depends on the requirements that will be formed and implemented by the customer</td>
<td>Implementation of interfaces in the selected development environment</td>
<td>Communicator of other ecosystems; Jira tool; Own communicator</td>
</tr>
</tbody>
</table>

We will characterize the general features of the use of the specified tools, highlight their advantages and disadvantages.

**The Microsoft 365 ecosystem.** This is a powerful set of tools from a well-known company, which, however, requires some customization. To store and structure documents, you can use the OneDrive storage, where versioning and changes in documents can be tracked through change logging, provided that you log in under personal accounts. Other Microsoft 365 tools allow for calculations, customization with programming elements using Excel 365 macros, Access 365 queries, other Microsoft 365 tools (allowing to implement syncretic methodology interfaces). Project team communications in this ecosystem can be carried out through Outlook mail, the Planner board (in the context of project tasks), the Skype video conferencing application, and other Microsoft 365 tools. The advantages of this ecosystem are its widespread (proven) and constant updating, friendly and familiar user interface (ease of use for users), the presence of a calendar-network planning tool in the ecosystem. The disadvantages are the need for qualified specialists to administer the ecosystem (relative complexity of administration), paid access (unlike Google) and the need for additional protection to ensure cyber security.

**The Google ecosystem.** It's also a powerful set of tools from a well-known company, but it also does require some customization. For storing and structuring documents, you can use the GoogleDrive storage, where you can also track versioning and changes in documents through change logging, provided you log in under personal accounts. Other tools of the Google ecosystem allow you to perform calculations, customizing with programming elements using macros of Google tables, Google forms, other tools of the Google ecosystem (which allows you to implement syncretic methodology interfaces). The communication of the project team in this ecosystem can be carried out through Gmail mail, the application for video conferences GoogleMeet, Google calendar, other Google tools. The advantages of this ecosystem are its widespread (proven) and constant updating, friendly and familiar user interface (ease of work for users), free access, lack of need for qualified specialists to administer the ecosystem (relative ease of administration). The disadvantages are the lack of a calendar-network planning tool in the ecosystem (unlike Microsoft), the lack of an explicitly implemented database in the ecosystem, the need for additional protection to ensure cyber security.

**Enterprise Resource Planning (EPR) system.** It is also a powerful IT system from a well-known company (for example, SAP), which, as a rule, requires in-depth customization. Such a system can implement a wide range of functionality that describes the organization's processes. The communication environment is always implemented inside the ERP system and is a standard functionality. However, the standard functionality set offered by EPR is usually not sufficient. The advantages of ERP are the high integration of the solution, the ability to implement all processes of a project-oriented approach.
organization, the unification of standards and processes, as a rule, high security. The disadvantages of ERP include the following: it requires significant individual customization (in particular, syncretic methodology interfaces must be developed separately), the high cost of both acquisition and support, the need for separate integration of third-party applications (due to separate development), the need for highly qualified specialists (as a rule, outsourcing) to support the system, which determines its weak flexibility.

**Own development of a project-oriented organization.** The development of a syncretic management environment, as well as the IT ecosystem of a project-oriented organization in general, can be done either in-house (with the help of specialists from its own IT department) or through outsourcing (ordering development from a third-party organization). The characteristic of own development is similar to the characteristic of the ERP system, but it has certain advantages and disadvantages relative to it. In particular, the advantages include a relatively low price (however, higher than the price of using the Microsoft ecosystem, and much higher than the free Google), higher flexibility due to internal development (internal specialists can make additional settings quickly enough). Among the disadvantages are weaker capabilities compared to other ecosystems (the development of a powerful ecosystem in-house is either unlikely or too long), likely difficulties in implementing syncretic methodology interfaces, likely lower integration with third-party applications compared to other ecosystems, an unfamiliar interface for users.

**Discussion of research results.** Within the framework of the conducted research, a SWOT analysis of their results was carried out, presented in the first form – with the identification of strengths, weaknesses, opportunities and threats of the proposed approach (Table 3).

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weakness</th>
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<tbody>
<tr>
<td>- Systematic approach to the implementation of syncretic methodology</td>
<td>- Insufficient completeness of scientific research in this direction;</td>
</tr>
<tr>
<td>- Taking into account all aspects of implementation, including IT implementation tools</td>
<td>- Insufficient level of practical approval of the approach;</td>
</tr>
<tr>
<td>- Adaptability of the approach</td>
<td>- Methodological complexity</td>
</tr>
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<tr>
<th>Opportunity</th>
<th>Threats</th>
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<tr>
<td>- Ensuring the ability to manage each portfolio project using its own methodology (tested by the team in previous projects);</td>
<td>- Threat of methodological confusion and inaccuracies;</td>
</tr>
<tr>
<td>- The possibility of improving project management;</td>
<td>- Threat of incorrect implementation of the methodology or inaccuracies during implementation;</td>
</tr>
<tr>
<td>- The possibility of scaling the approach;</td>
<td>- The threat of reducing the effectiveness of the organization</td>
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<td>- The threat of reducing the effectiveness of the organization</td>
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</table>

Among the main advantages of the given approach, it is worth defining its systematicity, complexity (taking into account the main aspects of implementation), flexibility and adaptability (the possibility of tailoring, i.e. adaptation to the conditions of a specific project-oriented organization) and the possibility of improving both the project management system in the organization and increasing competence members of project teams. An important advantage is also the defining feature of the syncretic methodology as such, which provides the ability to manage each project in the portfolio using a separate methodology familiar to the teams.

In general, based on the results of the SWOT analysis, it can be concluded that the approach proposed in this study regarding the implementation of syncretic project management methodology in the project activities of self-managed organizations is potentially effective and practically valuable.

**Conclusions.** In this article, in the context of the analysis of projects for the implementation of the syncretic project management methodology in the project activities of self-managed organizations, the stages of development of the direction of the implementation of methodologies and standards in practical activities are analyzed, and five such stages are distinguished. The modern stage - "Hybridization
The following can be identified as directions for further research in this context: development of models, methods and algorithms for the implementation of syncretic management in the activities of project-oriented organizations, wider practical testing of the proposed developments, implementation of interface models of methodologies that will be used within the framework of syncretic management of projects, programs and project portfolios.

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