



Integrated Model of Strategic Alignment and Project Portfolio Management Success

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Publication History: Received: 02.06.2026; Revised: 25.06.2026; Accepted: 01.07.2026; Published: 06.07.2026.

ABSTRACT: This paper addresses a critical gap in project management literature by integrating two distinct research traditions: strategic alignment and project portfolio management (PPM) success. While strategic alignment research offers a precise typology of alignment types (e.g., intellectual, operational, cross-domain), it has not connected these to portfolio outcomes. Conversely, PPM success research has identified validated mechanisms driving portfolio success (e.g., management quality, business case control) but has not explored how different alignment types influence these mechanisms. Prior integration attempts have treated strategy or alignment as aggregate variables, overlooking the nuanced internal structure of alignment. This study develops a conceptual model that maps specific strategic alignment types onto validated PPM success mechanisms, categorized by their organizational level of operation (strategic translation, execution, boundary-spanning). Four testable propositions are derived, offering a more granular theoretical vocabulary for researchers and a diagnostic-to-decision pathway for practitioners. The model shifts the research question from whether alignment predicts portfolio success to which type of alignment predicts which success mechanism under specific conditions.

KEYWORDS: Strategic Alignment, Project Portfolio Management, Organizational Strategy, Portfolio Governance, Resource Allocation, Project Success, Performance Management

I. INTRODUCTION

Organizations increasingly rely on project portfolios for strategy execution [1]. Despite extensive scholarship in both strategic alignment and project portfolio management (PPM), these two fields have developed largely in isolation. Strategic alignment, originating from Henderson and Venkatraman's (1993) model and refined by Gerow, Thatcher, and Grover's (2015) validated six-type typology, provides a construct-precise understanding of alignment, particularly in IT-business contexts [2, 3]. However, this tradition has not explicitly linked alignment types to specific portfolio outcomes. In parallel, an empirical research program led by Kock, Gemünden, Killen, and collaborators has meticulously decomposed portfolio success into independently validated mechanisms, such as management quality, business case control, and risk integration [4, 5, 6, 7, 8, 9, 10, 11]. This program, however, has not investigated how different types of strategic alignment predict the salience of these mechanisms.

Previous attempts to bridge strategy and portfolio management have treated strategy or alignment as a single aggregate variable, thus failing to leverage the internal structure of alignment typologies [12, 13, 14, 15, 16]. This oversight is significant because portfolio management is often theorized as a uniform process, insensitive to context, despite operating in dynamic and uncertain environments [17, 18]. A model that specifies which alignment types correspond to which success mechanisms would directly address these limitations by providing differentiated, testable expectations. This paper therefore develops an integrated conceptual model that maps strategic alignment types onto project portfolio success mechanisms. The central premise is that alignment type and success mechanism are interdependent. Intellectual alignment, focused on strategic intent, is theorized to correspond with strategic translation mechanisms (e.g., business case control). Operational alignment, concerning infrastructure and process fit, is linked to execution-level mechanisms (e.g., management quality). Cross-domain alignment, spanning both strategy and infrastructure, is associated with boundary-spanning mechanisms (e.g., risk integration, stakeholder engagement). The study pursues three objectives: (1) to synthesize the strategic alignment and portfolio success literatures at the construct level, (2) to develop an integrated model specifying alignment type-to-success mechanism predictions, and (3) to derive testable propositions for empirical validation. This offers a more granular theoretical vocabulary for researchers and a practical framework for practitioners to connect diagnostic judgments about alignment to priority-setting in portfolio management.



II. LITERATURE REVIEW

2.1 Organizing Logic of the Review

This review constructs a model mapping alignment types to success mechanisms. It first establishes theoretical foundations for a differentiated view of alignment, then examines the alignment typology, reorganizes portfolio success literature by organizational level, and finally evaluates prior integration attempts. Throughout, two debates are tracked: alignment as an achieved state versus an ongoing capability, and portfolio success driven by deliberate control versus emergent adaptation.

2.2 Theoretical Foundations for a Differentiated View of Alignment

The disaggregation of alignment is supported by strategic management theories that locate value creation at different organizational levels, such as the resource-based view, dynamic capabilities, and absorptive capacity [19]. If value creation mechanisms operate at varying levels, alignment, which spans strategic and operational domains, should not be uniformly applied. Daniel, Ward, and Franken (2014) empirically demonstrated that IS project portfolio management, as a dynamic capability, comprises distinct constituent capabilities that behave differently under turbulence, suggesting that portfolio-relevant capabilities are not monolithic [15]. This study extends this intuition to alignment types, positing that intellectual alignment acts more like a periodically renegotiated state, while operational alignment functions as a continuously exercised capability. Furthermore, portfolios operate in dynamic, uncertain environments, implying that type-to-mechanism mappings should be contingent rather than universal [18].

2.3 The Alignment Typology and Its Boundary

Henderson and Venkatraman's (1993) Strategic Alignment Model defined strategic IT management across four domains: business strategy, IT strategy, organizational infrastructure and processes, and IT infrastructure and processes, with alignment as the fit among them [2]. While foundational, it lacked specificity on how fit should be measured or if distinct fits behave differently. Gerow, Thatcher, and Grover (2015) addressed this by validating six types of alignment: intellectual alignment (business and IT strategy fit), operational alignment (business and IT infrastructure fit), and four cross-domain types linking strategy to infrastructure [3]. This typology is construct-validated, ensuring distinctness of types. Its boundary, however, is specific to IT-business alignment. For this model, the four cross-domain types are treated as a single collective category. Adjacent studies have formalized alignment as an input to portfolio value optimization or empirically linked PPM to IT strategic alignment, but often operationalize alignment as a single undifferentiated variable, thus not utilizing the typology's internal structure [16, 20].

2.4 Portfolio Success Mechanisms, Reorganized by Organizational Level

The empirical program by Kock, Gemünden, Killen, and collaborators has identified various portfolio success mechanisms. This review reorganizes these mechanisms by the organizational level at which they operate:

- **Strategic-translation mechanisms:** These govern how strategic intent is integrated and revised through portfolio decisions. Key mechanisms include:
- **Business case control:** Involves initial review, ongoing monitoring, and post-project tracking to ensure strategic rationale for investment [6].
- **Joint operation of deliberate and emergent strategy:** Demonstrates that top-down implementation and bottom-up recognition of strategy are complementary, with deliberate strategy weakening under turbulence [10]. Agile capabilities support emergent strategy recognition [11].
- **Termination quality:** Strengthening strategic fit by terminating projects that no longer align with strategy, with senior management involvement showing an inverted U-shaped effect [5].
- **Execution-level mechanisms:** These operate at the process and infrastructure level.
- **Management quality:** A three-dimensional construct encompassing information, allocation, and cooperation quality, acting as a foundational execution variable [4].
- **Portfolio management information systems (PPMIS) effects:** Improve performance contingent on process maturity and formalization, implying that tooling is effective only when underlying processes are ready [9].
- **Boundary-spanning mechanisms:** These require coordination across strategic and operational levels.
- **Portfolio-level risk integration:** Operates through risk transparency, connecting operational risk information to strategic resource decisions, contingent on portfolio context [7, 8].
- **Stakeholder engagement:** Affects success in a phase-specific manner, moderated by role clarity, and inherently spans organizational levels [21]. Relationship value from customers also affects portfolio success, extending boundary-spanning beyond internal organizational levels [22].



A critical observation is that nearly all these studies draw on German industrial-firm samples connected to the same research group, implying a boundary condition for any model built on these mechanisms. Furthermore, this program is comparatively light on formal theory, primarily testing management practices against outcomes without explicit theoretical derivation [23]. This contrasts with the alignment tradition, which is theoretically rich but outcome-poor in portfolio terms, making their integration productive.

2.5 Prior Integration Attempts and What Each Leaves Undone

Existing attempts to connect strategy and portfolio management, while methodologically advancing, have consistently treated strategy or alignment as aggregate variables, thus overlooking the construct-level detail of alignment types. Srivannaboon and Milosevic (2006) established bidirectional influence between business strategy and project management through case studies but did not specify measurable alignment constructs [12]. Meskendahl (2010) developed a framework linking business strategy typology to portfolio structuring and multidimensional success, but predated validated alignment typologies and treated success without mechanism-by-mechanism mapping [13]. Rodrigues Coelho et al. (2025) showed organizational strategy mediates the relationship between flexible portfolio management and value creation, but again modeled strategy as a single variable [14]. Adjacent work also operationalizes alignment as a single undifferentiated variable [15, 16, 20]. Evidence from other domains confirms the general alignment construct travels well, but without testing the portability of its internal type structure [24, 25]. This consistent pattern highlights the need for an integration that disaggregates alignment into its validated types.

2.6 Synthesis: What Is Agreed, What Is Contested, and What the Proposed Model Adds

Broad agreement exists on three points: alignment-related constructs predict portfolio outcomes [13, 16, 14], portfolio success is multidimensional [4, 13], and context, especially turbulence, moderates relationships [18, 8, 10, 22].

Two debates remain open: the **state-versus-capability** question (Henderson & Venkatraman, 1993, vs. Daniel, Ward, & Franken, 2014) regarding whether alignment is a static condition or an evolving exercise [2, 15], and the **deliberate-versus-emergent** question, partially addressed by Kopmann et al.'s (2017) finding that both strategy modes matter and differ under turbulence [10].

The proposed model extends current knowledge by: (1) importing a construct-validated alignment typology into a literature that has historically used a single aggregate variable, providing theoretical precision; (2) organizing validated success mechanisms by organizational level (strategic translation, execution, boundary-spanning), which is a novel contribution and provides a non-arbitrary basis for mapping; and (3) converting the open debates into modeled distinctions, theorizing intellectual alignment as a periodically renegotiated state and operational alignment as a continuously exercised capability, and exploring how alignment type conditions strategy modes under turbulence. This model specifies how strategy matters differently based on the type of alignment an organization possesses.

III. METHODOLOGY

3.1 Research Philosophy

This study adopts an **interpretivist research philosophy**, suitable for conceptual theory-building that constructs new relationships between existing, independently validated constructs [26]. Both the six-type alignment typology [3] and the portfolio success mechanisms [4, 5, 6, 10, 7, 21] are empirically validated. The task is to theorize their interrelationships, a meaning-making exercise between literatures. A positivist approach was deemed inappropriate as the contribution is theoretical structure, enabling future empirical testing, rather than hypothesis testing with new data [27].

3.2 Research Approach

The study employs an **abductive research approach**, iteratively reasoning between two validated empirical literatures. This is necessitated by the absence of a single overarching theory for a purely deductive approach and the lack of new category generation for a purely inductive approach. Abduction, moving between known theoretical building blocks and observed patterns, best describes the reasoning process [28].

3.3 Research Design

Following Jaakkola's (2020) typology, this study primarily uses a **Theory Adaptation** design, importing Gerow et al.'s (2015) alignment typology from IT-business alignment research to explain variations in project portfolio success mechanisms [26, 3]. This design carries a specific validity risk: the imported construct might not retain its structure in the new domain. The study also takes the form of a **Model**, specifying formal, falsifiable type-to-mechanism



propositions. The literature review was designed to surface tensions, consistent with Hulland’s (2020) standard for conceptual work, and propositions are tied to their generating reasoning as per Cornelissen’s (2017) guidance [29, 30].

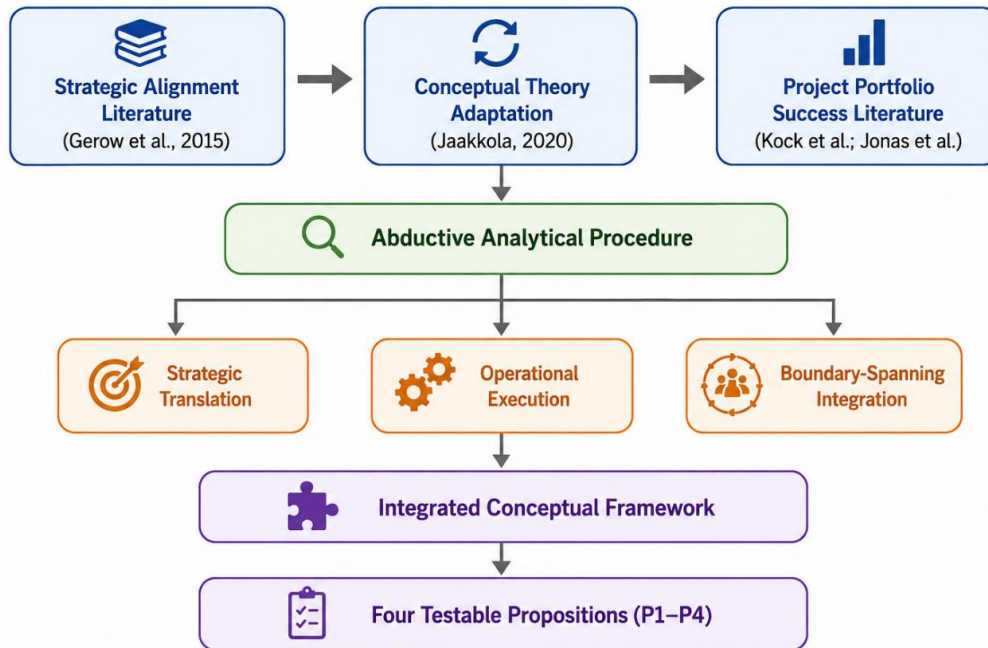


Figure1. Research Design and Theory Adaptation Framework

3.4 Construct Selection Strategy

Only alignment types and success mechanisms with demonstrated empirical support in verifiable, peer-reviewed sources were included. The four cross-domain alignment types are treated as a single collective category due to the scope of available construct definitions [3].

3.5 Analytical Procedure

The analytical procedure is a transparent two-step process. Data consists of construct definitions, operationalizations, and documented empirical relationships from source literature, extracted using a consistent protocol [31].

1. **Level-sorting:** Each validated success mechanism is sorted by the organizational level at which it operates: strategic translation (e.g., business case control, deliberate and emergent strategy, termination quality), execution (e.g., management quality, process-maturity-contingent information systems effects), or boundary-spanning (e.g., portfolio-level risk integration, stakeholder engagement). This sorting is theoretically motivated by the multi-level nature of value creation in strategic management theories [19].
2. **Matching:** Each alignment type is matched to the mechanism level corresponding to its organizational location: intellectual alignment (strategy-to-strategy) maps to strategic-translation mechanisms; operational alignment (infrastructure-to-infrastructure) maps to execution mechanisms; and cross-domain alignment (spanning strategy and infrastructure) maps to boundary-spanning mechanisms. Propositions are then derived from these mappings [30].

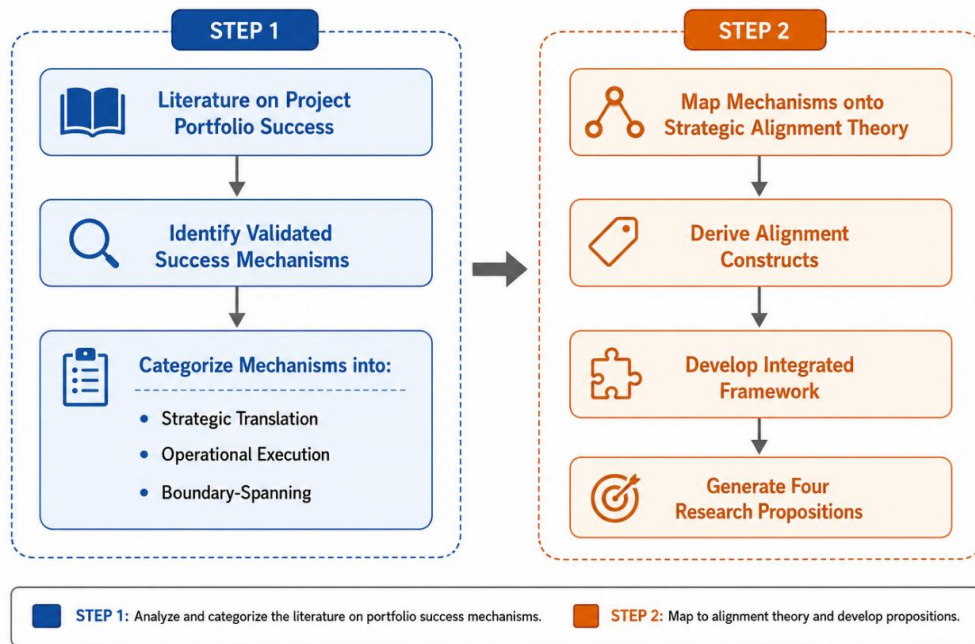


Figure2. Two-Step Analytical Procedure

The level-sorting step involves relatively low inference, while the matching step involves more interpretation, particularly for mechanisms with plausible claims to multiple levels (e.g., termination quality’s placement at the strategic-translation level reflects a judgment about its primary function).

3.6 Rigor: Validity, Reliability, and Credibility

Adapted rigor criteria are applied, consistent with conceptual-methodology guidance [27, 26, 29].

- **Construct validity:** Ensured by faithfully representing each imported construct to its source definition, extracting definitions from primary sources, and avoiding unsubstantiated sub-constructs.
- **External validity:** The central risk of Theory Adaptation. Gerow et al.’s (2015) typology was validated only within IT-business alignment; its applicability to project portfolio contexts is an empirical question. A minimal first test involves re-administering Gerow et al.’s validated instrument to a portfolio-manager sample to assess if the type structure survives the domain transfer [3].
- **Reliability:** Partially achievable. The level-sorting step is likely consistent, while the matching step involves judgments that could legitimately differ in edge cases.
- **Credibility:** Rests on citation discipline, ensuring every construct, definition, and empirical relationship is traceable to a verified, peer-reviewed source with complete bibliographic information.

3.7 Limitations

Five limitations stem from the methodological choices: (1) asymmetric reliability of the mapping procedure, with matching judgments being the weakest link; (2) unresolved external validity of the imported typology, requiring empirical testing; (3) reduced model resolution due to collective treatment of cross-domain alignment; (4) restriction of mechanisms to IT-compatible portfolio contexts; and (5) the concentration of success-mechanism literature in German industrial-firm samples, functioning as a scope condition on all propositions until broader sampling occurs.



IV. THE PROPOSED MODEL: TYPE-TO-MECHANISM MAPPINGS AND PROPOSITIONS

4.1 Output of the Analytical Procedure

This section presents the conceptual output of the two-step analytical procedure, focusing on the mappings, propositions, and boundary conditions, consistent with the interpretivist, Theory Adaptation design.

4.2 The Level-Sorted Mechanism Structure

The validated portfolio success mechanisms are sorted into three organizational levels:

- **Strategic-translation mechanisms:** Business case control [6], joint operation of deliberate and emergent strategy [10, 11], and termination quality [5].
- **Execution-level mechanisms:** Management quality [4] and process-maturity-contingent portfolio management information systems effects [9].
- **Boundary-spanning mechanisms:** Portfolio-level risk integration [7, 8] and stakeholder engagement [21].

Termination quality is placed at the strategic-translation level due to its primary function of strengthening strategic fit, despite its operational execution.

4.3 The Three Mappings

Each alignment category maps to the mechanism level corresponding to its organizational location. Table 1 summarizes the integrated model.

Table 1: The Integrated Model: Alignment Categories Mapped to Portfolio Success Mechanisms

Alignment Category (Gerow et al., 2015)	Organizational Level	Corresponding Success Mechanisms	Theorized Behavior
Intellectual alignment	Strategic translation	Business case control; deliberate/emergent strategy; termination quality	Periodically renegotiated state
Operational alignment	Execution	Management quality; PPMIS effects under process maturity	Continuously exercised capability
Cross-domain alignment	Boundary-spanning	Portfolio-level risk integration; stakeholder engagement	Mixed, contingent on turbulence

Intellectual alignment, defined at the strategy-to-strategy level, maps to strategic-translation mechanisms that articulate, revise, and enforce strategic intent. Operational alignment, defined at the infrastructure-to-infrastructure level, maps to execution mechanisms that operate at the process and infrastructure level. Cross-domain alignment, spanning strategy and infrastructure, maps to boundary-spanning mechanisms that require coordination across these levels. The model also converts the state-versus-capability debate into a modeled distinction: intellectual alignment behaves as a periodically renegotiated state, while operational alignment behaves as a continuously exercised capability.

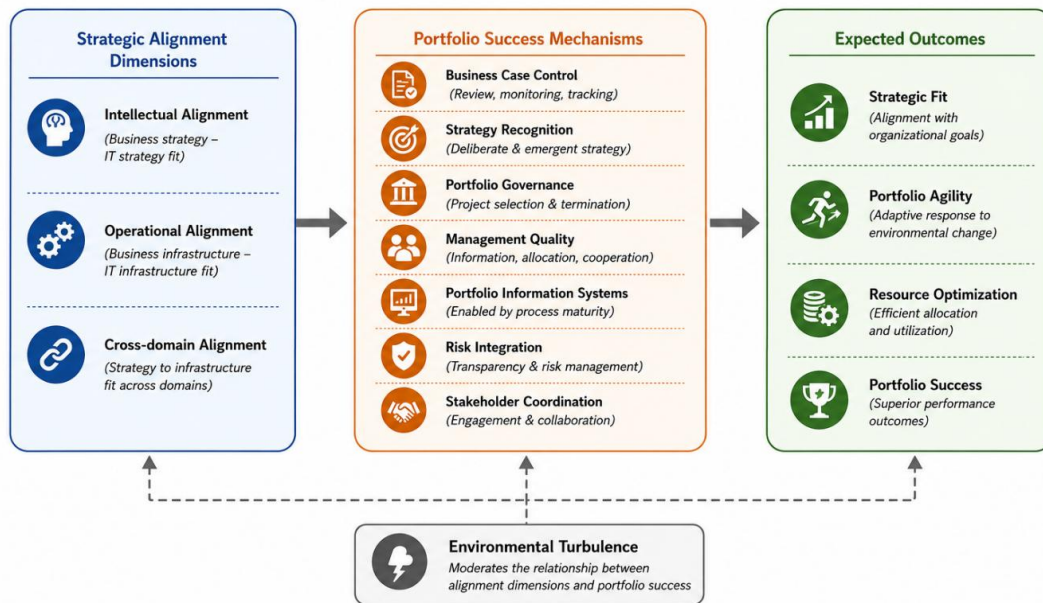


Figure3. Integrated Conceptual Framework

4.4 Propositions

1. Proposition 1: Intellectual alignment is positively associated with the effectiveness of strategic-translation mechanisms (business case control quality, joint positive effect of deliberate and emergent strategy, and termination quality), and more strongly so than with execution-level mechanisms. This is testable by pairing Gerow et al.'s (2015) intellectual-alignment measures with established mechanism measures across a portfolio-manager Sample [3].
2. Proposition 2: Operational alignment is positively associated with execution-level mechanisms (management quality and performance benefits of PPMIS under process maturity), and more strongly so than with strategic-translation mechanisms. The process-maturity contingency [9] suggests that operational alignment should moderate the PPMIS-performance relationship similarly to how maturity does.
3. Proposition 3: Cross-domain alignment is positively associated with boundary-spanning mechanisms (portfolio-level risk integration effectiveness and stakeholder engagement effectiveness), and more strongly so than either intellectual or operational alignment alone.
4. Proposition 4: Under environmental turbulence, the association in Proposition 1 weakens for deliberate-strategy pathways and strengthens for emergent-strategy pathways, thereby extending Kopmann et al.'s (2017) turbulence finding into the alignment domain and reframing the deliberate-versus-emergent debate as a testable contingency [10].

Propositions 1 and 2 are offered with the greatest confidence because of their lower-inference mappings. Proposition 3 is coarser because it treats cross-domain alignment collectively. Proposition 4 is the most inferential, combining a validated contingency with an untested domain transfer.

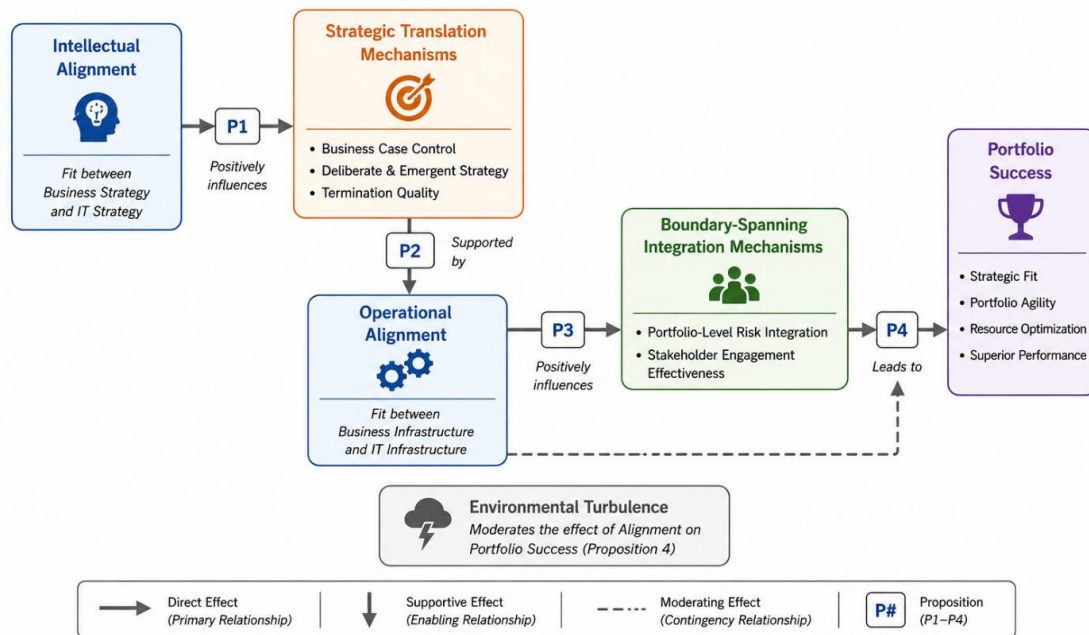


Figure 4. Proposition Architecture

4.5 Boundary Conditions

All propositions are subject to two scope conditions: (1) the model is scoped to IT-enabled portfolio contexts where the imported typology’s validity is established; and (2) the mechanism evidence predominantly derives from German industrial-firm samples, implying that empirical support should be read within this institutional boundary until broader replication occurs.

V. DISCUSSION

5.1 Interpreting the Model Against the Study’s Objectives

The model successfully synthesizes the two literatures, develops an integrated model, and derives testable propositions. Its structure reveals a precise complementarity: the alignment tradition offers construct precision without portfolio outcomes, while the success tradition provides validated outcomes without construct-differentiated antecedents. This suggests the two traditions have been studying adjacent segments of a single causal chain. For instance, Kock, Schulz, Kopmann, and Gemünden’s (2020) process-maturity contingency is structurally an operational-alignment claim, even without using alignment vocabulary [9]. The model also converts the field’s standing debates (state-versus-capability, deliberate-versus-emergent) into differentiated, testable claims, replacing an unresolved either-or with a specified when-which. This directly addresses Martinsuo’s (2013) critique of undifferentiated portfolio management [17]. Furthermore, the level-based sorting of mechanisms suggests an internal architecture within the Kock/Gemünden catalogue, organized by organizational level, which could reframe how this literature is understood.

5.2 Consistency and Contradiction with Existing Literature

The model is largely consistent with existing empirical records, preserving validated mechanism relationships and extending prior integration attempts by specifying how strategy matters differently by alignment type [13, 12, 14, 15, 16, 20]. It particularly complements Araujo, Storopoli, and Rabechini (2021), whose single-latent-variable finding confirms the aggregate relationship while highlighting the opportunity for disaggregation [16]. The model challenges two implicit assumptions: that alignment operates uniformly across organizational levels, and that more strategic attention is always better, especially given the non-linear effects observed in termination quality [5].

5.3 Theoretical Implications

The primary theoretical contribution is the **Theory Adaptation** of a construct-validated alignment typology into a literature that has historically used a single aggregate variable [26]. This provides a differentiated theoretical vocabulary for the portfolio field. Regardless of whether the typology’s structure survives domain transfer, the outcome



advances knowledge by either providing a new framework or defining the typology's boundaries. A secondary implication is the model's function as a theoretical transfer mechanism, routing the theory-rich alignment tradition into the theory-light success tradition, thereby instantiating Killen, Jugdev, Drouin, and Petit's (2012) argument for applying strategic management theories to portfolio research [19].

5.4 Practical Implications

For practitioners, the model offers a **diagnostic-to-decision pathway**. By characterizing an organization's alignment condition (e.g., strong strategic consensus but weak process fit), portfolio leaders gain theoretically grounded expectations about which levers to prioritize. For instance, intellectual alignment suggests prioritizing business case discipline and termination rigor, while operational alignment points to management quality and systems maturity. The model also cautions against misaligned investments, such as deploying PPMIS into organizations with weak operational alignment, which is consistent with process-maturity contingencies [9].

5.5 Methodological and Policy Implications

Methodologically, the study demonstrates that a transparent, two-step, criterion-based mapping procedure can generate auditable propositions. The stated inference asymmetry between sorting and matching steps provides a template for other conceptual papers. For research policy, empirical testing should begin with a minimal transfer test: re-administering Gerow et al.'s (2015) instrument to a portfolio-manager sample, ideally outside the German industrial context, before full proposition testing [3]. If Propositions 1 and 2 are supported, alignment-type assessment would merit inclusion in portfolio governance reviews.

5.6 Unexpected Insights

Two unexpected insights emerged: (1) the organizational-level dimension proved highly effective in sorting the mechanism catalogue, suggesting it is a latent organizing dimension of the literature; and (2) the discovery of an implicit alignment claim within the success literature (Kock et al.'s (2020) process-maturity contingency) strengthens confidence in the model's mappings [9].

5.7 Limitations

Beyond the methodological limitations, interpretive limitations include: (1) the model's resolution is capped by the collective treatment of cross-domain alignment; (2) practical implications are conditional on future empirical support; and (3) interpretive claims extend beyond formal propositions and are offered as informed interpretations.

VI. CONCLUSION

This study addressed the structural gap between strategic alignment research and project portfolio management success research. It synthesized the two literatures at the construct level by reorganizing success mechanisms by organizational level, developed an integrated model mapping alignment categories to mechanism levels, and derived four testable propositions. This shifts the field's central question from whether alignment predicts portfolio success to which kind of alignment predicts which success mechanism, under what conditions, and behaving as a state or as a capability. This shift from an aggregate 'whether' to a differentiated 'which-when' directly responds to Martinsuo's (2013) caution against uniform, context-insensitive theorizing [17].

The model's claims are honestly bounded: it is scoped to IT-enabled portfolio contexts, treats cross-domain alignment collectively, and relies on mechanism evidence predominantly from German industrial-firm samples. These boundaries are not weaknesses but precise coordinates for future research to test the typology's transfer, refine collective categories, and broaden sampling. The contribution is theoretical, providing a foundation for future empirical validation and fostering integration between two previously isolated, yet complementary, research traditions.

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