

Project Management Update from São Paulo¹

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Introduction. This is our first Project Management report of 2026 on Brazil, with a São Paulo lens. It is meant to serve as the year's baseline. In practical terms, it sets the recurring angles we will track across the next editions: governance maturity (portfolio, risk, benefits), delivery capacity (people and capabilities), and market professionalization (training and credentials).

1. The shift from frameworks to value delivery. The starting point is a shift in emphasis. The core question is no longer which method an organization claims to use. It is how it governs choices, risk, and benefits. In 2026, the gap between mature and immature organizations shows up less in methodological rhetoric and more in three operational questions: who decides what (portfolio), how change is controlled (risk and contracting), and how benefits are demonstrated (value). This direction aligns with the PMI's recent framing of business acumen as a differentiator that lifts project performance beyond schedule, scope, and budget (Project Management Institute, 2025).

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In São Paulo, that lens tends to be harsher because scale and institutional density raise the cost of volatility. Predictability and accountability are not add-ons. They are operating requirements. A useful proxy for that pressure is the state's economic outlook itself: official projections and commentary on São Paulo's GDP help anchor expectations around investment cycles and the demand for delivery competence (Fundação Seade, 2025).

2. Two forces shaping the moment: talent constraints and public-sector pressure. The first force is capacity. PMI estimates suggest project-management employment will continue to expand through 2035, while the world may face a shortage of up to 29.8 million qualified professionals. PMI also places the profession's global headcount around 39.6 million in 2025. The practical implication is straightforward: execution gets more expensive. The cost of rework rises, competition for experienced talent intensifies, and standardized language and governance become more valuable as coordination tools (Project Management Institute, 2025a).

The second force is institutional. Brazil's Public Procurement Law, Law No. 14,133/2021, strengthens requirements around planning, contract management, and risk treatment in public procurement. In parallel, governance references disseminated by the Federal Court of Accounts (TCU) reinforce expectations around transparency, accountability, and results orientation. In government-funded projects, these pressures pull classic project management routines into the spotlight: risk ownership, change control, responsibilities, monitoring, and auditable decision trails (Brasil, 2021; Tribunal de Contas da União, 2020).

3. Credentials and the training boom: a market signal that became infrastructure. Few developments are as visible in Brazil right now as the credential market, and the training market that feeds it. There is a signaling component, as employers use credentials to filter candidates in a constrained talent environment. There is also a direct economic component. PMI reports that PMP credential holders show a median salary that is 17% higher than non-certified peers, based on results across 21 countries (Project Management Institute, 2025b; Project Management Institute, 2025c).

Brazilian career journalism has echoed the same signal. An Exame report listed the PMP among the most demanded certifications in hiring, alongside other technical and regulated credentials (Exame, 2024). Meanwhile, the supply side is widening fast. In January 2026, CNN Brasil reported a free, online fundamentals course in project management offering a certificate, with enrollment open through the end of the month. It is one more sign that entry-level pathways are expanding and becoming mainstream (CNN Brasil, 2026).

In São Paulo, the expansion is not just volume. It is institutionalization. PMI São Paulo maintains structured training and prep offerings for certifications, reinforcing a continuous-service ecosystem that combines training, credentials, and community (PMI São Paulo, 2026a; PMI São Paulo, 2026b). A landmark on the academic side arrived in 2026: Senac announced that its postgraduate program in project management received PMI Global Accreditation Center (GAC) accreditation, and PMI's own directory lists Senac under accredited programs, confirming the formal status of that recognition (Senac, 2026; PMI GAC, n.d.).

The analytical takeaway is uncomplicated. In Brazil, training and certification have become part of the industry's infrastructure. They help standardize language and reduce information asymmetry. They do not replace governance or experience. Where credentials are treated as shortcuts, organizations end up with strong résumés and weak delivery.

4. Market signals and events. A short events lens helps timestamp the São Paulo ecosystem and reinforces the report's “frameworks to value” arc. The PMI São Paulo Summit 2025, held on 2–3 December 2025 at the Transamerica Expo Center, positioned its edition under the “Do Projeto ao Impacto” framing and the “M.O.R.E.” identity, a signal that the local discourse is increasingly anchored in impact, value, and outcomes rather than method labels (PMI São Paulo, 2025).

A second market signal comes from the VMO Summit 2025 in São Paulo (23–24 April 2025), which brings the PMO-to-VMO shift into a practical agenda with corporate leaders explicitly carrying portfolio, transformation, PMO/VMO, and value governance titles. This matters because it indicates that value-oriented governance is moving from theory into community practice (UGlocal, 2025).

A third, adjacent signal is Febraban Tech 2025 (10–12 June 2025, São Paulo). It is not a “pure PM” event, but it functions as a barometer for transformation portfolios in finance and its ecosystem. Febraban's own service note highlights the dates and São Paulo venue, which is useful context for why delivery governance is increasingly central in the state's capital-intensive sectors (Febraban, 2025).

Looking ahead for subsequent 2026 reports, UGlocal already lists the VMO Summit 2026 in São Paulo (12–13 May 2026), which can be flagged as a “watch item” for how the PMO/VMO conversation evolves throughout the year (UGlocal, 2026).

5. Public-sector cases that show “project management” as an institutional language.

Jundiaí: portfolio logic at the metropolitan level. A São Paulo example comes from the Jundiaí Metropolitan Region, which announced a technical office focused on metropolitan priority projects. The stated purpose was to define priorities and accelerate

delivery across multiple municipalities. This is portfolio management in public-sector terms: governance mechanisms designed to choose, sequence, and coordinate work beyond a single agency's boundaries (Prefeitura de Jundiaí, 2024).

Olympic governance: when a PMO becomes part of the operating model. The Brazilian Olympic Committee (COB) offers another instructive case. In a January 2026 retrospective, COB credited its Project Office with aligning strategic planning for the Olympic cycle and maintaining or renewing a quality certification (ISO 9001). The headline is not the certificate. It is the mechanism: a PMO functioning as a stabilizer of priorities, discipline, and traceability in an environment defined by multiple stakeholders and high visibility (Comitê Olímpico do Brasil, 2026).

Judiciary: PMO maturity that can be compared, evaluated, and audited. In the public sector, a strong maturity signal appears when PMO practices become subject to recognition and benchmarking. In November 2025, the TJDFT reported that it was a finalist for the PMI-DF 2025 award in the “Best PMO” category, tied to its project management office. That is an indicator that project language is being used to evaluate public governance, not only internal efficiency (Tribunal de Justiça do Distrito Federal e dos Territórios, 2025a).

Operationally, TJDFT also described PMO structure in its 2025 IT Master Plan communications, highlighting methodological support and management dashboards. That is the familiar maturity tripod: planning, monitoring, and transparency (Tribunal de Justiça do Distrito Federal e dos Territórios, 2025b). In January 2026, TJDFT reported leading a national ranking on AI projects, citing the volume of initiatives in 2025. In governance terms, the message is that once minimum portfolio discipline exists, innovation can be converted into a manageable and communicable project pipeline (Tribunal de Justiça do Distrito Federal e dos Territórios, 2026).

Espírito Santo: PMO as a state policy and a benchmarking reference. A broader benchmark comes from Espírito Santo. In May 2024, the state's project office was reported as having been recognized as the “best PMO in Brazil” in an event linked to PMI Brazil Chapters, with emphasis on structuring and monitoring strategic programs and projects. This kind of evidence matters because it frames maturity as institutional capability, not as isolated heroics (Instituto Jones dos Santos Neves, 2024).

6. Private sector: hybrid delivery is normalized, but outcomes depend on governance. In 2026, Brazil's private sector is no longer treating “agile vs. predictive” as an identity debate. Hybrid delivery is the working default, especially in São Paulo, where regulated environments, legacy platforms, and fast product cycles coexist. In practice, “hybrid” means adaptive execution at team level combined with portfolio governance that

keeps decisions traceable and outcomes defensible to executives, auditors, and regulators (PMI, 2025).

The recurring failure mode is method theater. Organizations adopt rituals and tools, but still lack the mechanics that convert speed into results: clear decision rights, a stable prioritization cadence, change control that does not break contracting, and benefit definitions that survive budget cycles. This is where the PMI emphasis on business acumen becomes more than rhetoric, since it shifts performance from delivery mechanics toward value ownership and broader success factors (PMI, 2025).

A second shift is operating-model logic. Brazilian industry reporting has increasingly framed the move from project-centric structures toward product-oriented operating models and value streams, with PMO-to-VMO evolution presented as a governance response to chronic maturity gaps. In one prominent example, ComputerWeekly Brazil reports persistent dissatisfaction with project management maturity and links it to the rise of value stream management and the PMO→VMO agenda (Quezada, 2025).

In São Paulo-heavy sectors, investment scale turns this governance pivot into a necessity rather than a preference. The Deloitte–Febraban 2025 survey positions technology spending growth and AI scalability pressures as drivers, while also stressing governance, information security, and professional upskilling as pillars for responsible adoption (Deloitte & Febraban, 2025).

Finally, talent pressure reinforces the same conclusion. PMI's global talent gap work signals that demand growth and projected shortfalls raise the cost of weak governance and increase the premium on repeatable controls, standard language, and experienced leadership routines (PMI, 2025).

7. Project maturity in Brazil: real progress, persistent unevenness. Brazil's maturity picture remains heterogeneous. There are mature pockets where portfolio choices, risk routines, and benefit tracking are normal. There is also a large middle where projects remain episodic, change discipline is weak, and benefits management is thin. What 2026 tends to do is raise the cost of that unevenness, because the environment combines talent constraints with institutional pressure (Project Management Institute, 2025a; Brasil, 2021; Tribunal de Contas da União, 2020).

Four warning signs repeatedly show up when governance fails: talent scarcity; uncontrolled scope change; decisions without recorded criteria; and credentials being used as substitutes for experience rather than complements. In 2026, the specific risk is the combination of a hot training market with delivery urgency. That can widen entry, but it can also create noise if organizations do not invest in supervision, standards, and on-the-job learning (Project Management Institute, 2025a; CNN Brasil, 2026).

8. Closing: 2026 as the year of delivery governance, and of tougher credential filtering. If January 2026 leaves one clear message, it is that project management in Brazil is increasingly synonymous with governance of delivery. São Paulo accelerates the shift through scale and ecosystem effects. Credentials and the explosion of training

are now part of the professionalization infrastructure: they respond to scarcity and standardize language. At the same time, they raise the bar for employers, who must separate the signal of credentials from the substance of delivery capability (Exame, 2024; Project Management Institute, 2025b; Senac, 2026; PMI São Paulo, 2026a).

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