



CASE STUDY

Zakat, Tax and Customs Authority
(ZATCA) / SYNEXCELL

› EXCELLENCE
IN PORTFOLIO,
PROGRAMME
AND
PROJECT
MANAGEMENT

INTRODUCTION

The Zakat, Tax and Customs Authority (ZATCA) is a strategic institution formed by the unification of the General Authority of Zakat and Tax and the General Customs Authority in the Kingdom of Saudi Arabia.

Its mandate extends beyond revenue collection to ensuring compliance, facilitating trade and safeguarding national security. ZATCA is a central pillar in Saudi Arabia's Vision 2030, contributing to economic sustainability and the transformation of the Kingdom into a global logistics hub.

In line with its strategic enablers – such as digitalization, data analytics and operational excellence – ZATCA recognized the need for a mature and integrated approach to managing portfolios, programmes and projects.

In 2020, ZATCA achieved Level 4 maturity under the P3M3 model, which validated the strength of the organization's standardized delivery processes. However, it was understood that reaching Level 5 would enable ZATCA to embed optimization, strategic agility and continuous improvement at every level of the organization.

As the organization's Accredited Consulting Partner (ACP), SYNEXCELL specialises in enabling organizations to convert maturity frameworks into actionable and sustainable capability enhancements. Its role was to help ZATCA bridge the final gap to Level 5 maturity, ensuring that delivery practices were not just standardized but continuously optimized and embedded within strategic decision-making.

ZATCA's ambition led to the adoption of the PRINCE2 P3M3 model (by PeopleCert) for a full-scale maturity assessment and improvement programme in 2025. This would cover the full spectrum of portfolio, programme and project delivery while assessing all seven core perspectives in the model:

Organizational governance

Management control

Benefits management

Risk management

Stakeholder management

Finance management

Resource management



CHALLENGES AND OBJECTIVES

Despite ZATCA's strong foundation at Level 4, several areas required improvement to reach the optimized level (PRINCE2 P3M3 level 5):

- › Delivery practices across portfolios, programmes and projects lacked full integration.
- › ZATCA has strong documentation and system-based processes, with performance regularly measured and reviewed. However, lessons learned and feedback are not consistently analyzed for trends or used to drive continual improvement across programmes. This limits ZATCA's ability to fully optimize its practices and embed learning at an organizational level.
- › The strategic link between portfolios and enterprise-level objectives – and associated decision making – required better real-time data insight and alignment.
- › Benefits management frameworks existed but were not fully predictive or actively governed post-initiation.
- › Performance dashboards and predictive analytics required enhancement to support proactive risk mitigation.
- › Feedback loops and assurance mechanisms were present but not embedded deeply enough to enable ongoing optimization.
- › Stakeholder engagement and assurance are consistent at delivery levels, but lack full integration across strategic and delivery layers. This limits opportunities for organization-wide learning and continual improvement.

TO ADDRESS THESE CHALLENGES, THE ORGANIZATION DEFINED CLEAR OBJECTIVES:

- › Attain Level 5 maturity certification across all three PRINCE2 P3M3 sub-models: portfolio, programme and project management.
- › Develop a self-sustaining, data-driven and agile PMO ecosystem.
- › Implement continuous improvement practices, enabled by digital tools and evidence-based governance.
- › Ensure complete strategic alignment across planning, execution and benefits realization.

AS PART OF THE MATURITY ASSESSMENT AND IMPROVEMENT PROGRAMME, ACCREDITED CONSULTING PARTNER SYNEXCELL'S KEY OBJECTIVES WERE:

- › To strengthen vertical and horizontal integration across project, programme and portfolio management.
- › To introduce predictive governance, risk and performance tracking mechanisms.
- › To help design and institutionalise continual improvement processes aligned with operational agility.
- › To prepare ZATCA for final PRINCE2 P3M3 maturity certification through structured evidence collection and capability reinforcement.

SOLUTION

ZATCA's collaboration with SYNEXCELL covered the full scope of the PRINCE2 P3M3 model, three sub-models and seven perspectives. The engagement was based on transparency, ownership and cross-functional engagement. Internally, the organization assembled a dedicated transformation team and empowered stakeholders from various departments to contribute to evidence collection, interviews and solution design.

The teams provided detailed documentation, engaged in structured interviews and co-developed improvement initiatives tailored to the environment.

SYNEXCELL applied a six-phase approach tailored to PRINCE2 P3M3 assessment requirements and ZATCA's operational environment. These phases ensured not only certification readiness but long-term resilience and operational transformation:

- › **Initiation and scoping:** Defined the sub-models, perspectives and organisational units to be assessed. Developed evidence collection plans and stakeholder engagement strategies.

- › **Assessment and analysis:** Conducted structured interviews, reviewed systems and documentation and benchmarked maturity against global best practices.
 - › **Gap identification:** Mapped observed practices against PRINCE2 P3M3 diagnostic attributes to identify maturity gaps and performance risks.
 - › **Improvement design:** Collaborated with ZATCA teams to design continuous improvement initiatives, covering risk analytics, innovative stakeholder tools, resource optimization and strategic alignment. Among the innovation improvements were intelligent dashboards, predictive analytics, stakeholder engagement systems and a centralised knowledge platform to support institutional learning.
 - › **Implementation support:** Piloted changes within selected programmes and projects, adjusted based on feedback, and embedded enhancements in PMO frameworks, templates and policies.
 - › **Final evaluation:** Conducted the formal maturity assessment and prepared documentation for PeopleCert review, resulting in a Level 5 maturity certification.
- All initiatives aligned with the strategic enablers, including digitalization, integration and data analytics. This alignment guaranteed that improvements were not only tactical but also contributed to long-term institutional goals.

RESULTS

The final assessment confirmed ZATCA's complete alignment with, and achievement of, the requirements of Level 5 – optimised maturity – across all sub-models and perspectives, including governance, benefits management, finance, stakeholder engagement and risk.

Obtaining the optimised maturity level means that processes are continuously improved based on performance data, learning cycles are embedded and delivery capability is fully integrated into strategic planning.

KEY ACHIEVEMENTS AND IMPACTS INCLUDE:

A fully integrated portfolio, programme and project management framework with clear escalation paths and performance feedback.	Seamless integration of PMO governance with national-level decision-making processes.	Enhanced alignment between national strategy, organizational objectives and project execution.
Real-time insights through implementation of dashboards for risk, resource and stakeholder management plus real-time monitoring tools and decision-support systems.	Centralised supplier evaluation platforms and intelligent resource planning models that improve allocation efficiency.	Institutionalised learning through an integrated lessons learned platform, reducing repetition of avoidable errors and promoting knowledge retention.
A closed-loop feedback system across all delivery levels, supporting evidence-based agility.	A predictive operating model capable of responding dynamically to evolving mandates and stakeholder needs.	Institutional knowledge is captured and disseminated through a centralised platform, improving performance over time.

ZATCA now operates as one of the most mature government delivery organizations globally under the PRINCE2 P3M3 standard. This achievement qualified the organization also to obtain the highest levels in globally-recognised management/performance model, EFQM and the Performance Measurement Maturity Model from the KPI Institute.

The transformation positions them to lead not only in revenue and customs management but also in the governance, execution and continuous improvement of major public sector programmes.

INSPIRATION

“These outcomes have transformed our PMO from a compliance function into a strategic, value-driven enterprise capability that directly contributes to the delivery of Saudi Vision 2030 targets.”

Zakat, Tax and Customs Authority of Saudi Arabia (ZATCA)

“When ZATCA engaged us in 2025, it was clear this was not simply about reassessment. It was a strategic initiative to institutionalise a world-class delivery capability..”

Nizar Y. Abuawwad, Partner – SYNEXCELL

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