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THEMATIC ARTICLE

Underdevelopment historical analysis about management in Brazil: the influence of the World Bank on the consolidation of managerialism in public projects in the developing countries[1]

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Abstract

By adopting the 1990s as a timeframe, this article addresses the influence of multilateral institutions in carrying out development projects in Brazil, based on a historical review of the notion of Development Management (Brinkerhoff & Coston, 1999; Thomas, 1996). Consolidated reports from the World Bank Management Reform period were analyzed to investigate the normative suggestions made by the multilateral agency for the success of the ventures and implementation of investment in the country at the time. The study aligns with Critical Development Studies by presenting the historical development of the management experience in Brazil as a reflection of the power and influence of project management in developing countries. The theoretical framework adopted in this study was the critical perspective from the seminal approach of inter-organizational development projects in this countries by Ika and Hodgson (2014). The results demonstrate how multilateral agencies have operated in Latin America from a managerialist perspective. This novel understanding was developed by surveying the critical factors of the alignment between the management and the principles of globalization to shed light on the interests of the directive actions of international bodies in developing countries. The article concludes with evidence of the World Bank's performance in cohesion with the development management area and dependence on the Western model for structuring the management apparatus.

Keywords: Critical development studies. Development management. Development project management.

Análise histórica das condições de subdesenvolvimento em gestão no Brasil: a influência do Banco Mundial para a consolidação do gerencialismo em projetos públicos no Terceiro Mundo

Resumo

Adotando como recorte temporal a década de 1990, este artigo aborda a influência das instituições multilaterais na realização de projetos de desenvolvimento no Brasil, a partir de uma revisão histórica da noção de Gestão do Desenvolvimento (Brinkerhoff & Coston, 1999; Thomas, 1996). Relatórios consolidados do período da Reforma Gerencial do Banco Mundial foram analisados para averiguar as sugestões normativas feitas pela agência multilateral para o sucesso dos empreendimentos e implementação de investimentos no país à época. O estudo se alinha aos Estudos Críticos de Desenvolvimento ao apresentar o desenvolvimento histórico da experiência gerencial no Brasil como reflexo do poder e influência do gerenciamento de projetos em países subdesenvolvidos. O referencial teórico adotado neste estudo foi a perspectiva crítica a partir da abordagem seminal de projetos de desenvolvimento interorganizacional em países do Terceiro Mundo de Ika e Hodgson (2014). Os resultados demonstram como as agências multilaterais têm atuado na América Latina a partir de uma perspectiva gerencialista. Esse novo entendimento foi desenvolvido a partir do levantamento dos fatores críticos do alinhamento entre a forma de gestão e os princípios da globalização para lançar luz sobre os interesses das ações diretivas dos organismos internacionais nos países em desenvolvimento. O artigo conclui com evidências da atuação do Banco Mundial em coesão com a área de gestão do desenvolvimento com dependência do modelo ocidental para estruturação do aparato de gestão.

Palavras-chave: Estudos críticos de desenvolvimento. Gestão do desenvolvimento. Gerenciamento de projetos de desenvolvimento.

Análisis histórico del subdesarrollo de la gestión en Brasil: la influencia del Banco Mundial en la consolidación del gerencialismo en proyectos públicos en el tercer mundo

Resumen

Adoptando como marco temporal la década de 1990, este artículo aborda la influencia de las instituciones multilaterales en la realización de proyectos de desarrollo en Brasil, a partir de una revisión histórica de la noción de gestión del desarrollo (Brinkerhoff & Coston, 1999; Thomas, 1996). Se analizaron informes consolidados del período de la Reforma Gerencial del Banco Mundial para investigar las sugerencias normativas realizadas por el organismo multilateral para el éxito de los emprendimientos e implementación de inversiones en el país en la época. El estudio se alinea con los estudios críticos del desarrollo al presentar el desarrollo histórico de la experiencia de gestión en Brasil como un reflejo del poder y la influencia de la gestión de proyectos en los países subdesarrollados. El marco teórico adoptado en este estudio fue la perspectiva crítica desde el enfoque seminal de proyectos de desarrollo interorganizacional en países del tercer mundo de Ika y Hodgson (2014). Los resultados demuestran cómo las agencias multilaterales han operado en América Latina desde una perspectiva gerencialista. Esta nueva comprensión se desarrolló mediante el estudio de los factores críticos de la alineación entre la forma de gestión y los principios de la globalización para arrojar luz sobre los intereses de las acciones directivas de los organismos internacionales en los países en desarrollo. El artículo concluye con la evidencia de la actuación del Banco Mundial en cohesión con el área de gestión del desarrollo con la dependencia del modelo occidental para estructurar el aparato de gestión.

Palabras clave: Estudios críticos del desarrollo. Gestión del desarrollo. Gestión de proyectos de desarrollo.

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INTRODUCTION

Created after World War II, the World Bank is the leading economic institution and exerts enormous international influence. Indeed, research on the institution has shown its performance as a funding organization in the recovery of emerging and developing countries, but above all, as a political articulator of processes involving such development (Ika, Diallo, & Thuillier, 2012; Jones, 1992). Due to the position achieved by the bank, it has become one of the leading multilateral organizations to rely on management processes and practices to execute the "deliberate management of development interventions" (Cooke, 2004) in its relations with countries in regions other than its headquarters.

When applying the recent branch of Organizational Studies (OS) known as Development Administration and Management (DAM) to Latin American contexts – that is, the theoretical construction of North Atlantic Development Administration and Management (NADAM) – it has come to identify the World Bank as a symbolic institution for promoting management practices and languages concerning development (Cooke, 2004). Furthermore, by allowing the adoption of developing countries as units of analysis (Ferguson, 1990), the NADAM theory has helped scholars to identify the development process in each nation through managerialist ideas, in addition to the foreign actors involved in the process (Elias-Sarker, 2006). In the case of Brazil, the literature points to a particularity concerning development management, which refers to its industrial history and the evolution of public administration since the establishment of the Republic (Abrucio & Loureiro, 2018).

However, many research perspectives are based on development management analysis, specifically concerning the managerialist scope. These studies emphasize the economic aspect as they conclude that Brazil has been aligned with the doctrinal precepts of the Economic Commission for Latin America and the Caribbean (ECLAC) since its creation (Wanderley, 2015) by establishing national institutions dedicated to investing in the country's development, such as the National Bank for Economic and Social Development (BNDES) (Cooke & Faria, 2013).

The World Bank has historically been considered one of the primary supporters of the country's development and actively participated in projects in various Brazilian sectors of the economy and production between 1960 and 1980 from the perspective of economic studies. However, despite the significant volume of loans and the constant presence of the multilateral institution throughout the country's history, there is a form of "meta-silence" (Cooke, 2015) associated with development management studies in Brazil and how the World Bank operates in the country based on the NADAM theoretical framework, that is, on the genuinely managerialist aspect. One of the challenges of mapping this perspective historically is the lack of consolidated data on the Brazilian experience, especially in the 1990s, at the height of the country's managerialist reforms and changes in administrative public policies.

Rationale and theoretical contribution

This article aims to understand the influence of the World Bank as a multilateral development agency involved in managerialist reform in Brazil in the 1990s. To this end, it adopts a theoretical perspective based on the concept of Development Management (Brinkerhoff & Coston, 1999; Thomas, 1996) applied to a third-world context, departing from the critical context of organizational development projects seminally presented by Ika and Hodgson (2014) through development project experiences conducted in Brazil.

From the analysis of the reports and based on a documentary methodological perspective, the World Bank convicing can be complementary to the analysis of the theory of development administration (DAM) (Cooke, 2003, 2004). Indeed, this is an interdisciplinary approach in organizational studies, according to the "soft power" (Naylor, 2011; Nye, 2004) exerted by institutions of global influence in third-world countries, either through the discourses present in reports, the procedural means of conducting projects, and the recommendations regarding the necessities and urgencies for driving public policy in Brazil "towards progress." Furthermore, documents and reports covering all years of the analyzed period attest not only to the influence of the World Bank but to its role as a body of articulation of the country's political and economic decisions, thus requiring the critical analysis of the development performance.

The document analysis shows that the World Bank's actions are consistent with development management, and they also reveal the strengthening of a globalization project based on the precepts imposed by the multilateral organization. Given the consolidation of managerialist guidelines for the success of the selected projects and based on the position adopted by the World Bank, we present and analyze the key narrative patterns of characters and stories in the projects carried out in first-world countries to propose development according to the emerging situation (Ramos, Mota, & Corrêa, 2016).

This paper is organized as follows: the first section presents and delimits the aspects involving the research method from an epistemological and practical perspective and the criteria for selection, codification, and analysis of documents concerning the World Bank's performance in the historical context. Then, Development Management theory is addressed from the critical perspective of organizational development projects by showing the theoretical framework applied to the reality of public management related to structural projects in developing countries. Finally, the third section is dedicated to explaining the role of the World Bank in organizational development projects in these countries, the relevance of this multilateral agency for Managerialist Reform projects in Brazil in the 1990s, and the interpretations collected through documentary research.

THEORETICAL BACKGROUND: THE CRITICAL-EMPIRICAL PERSPECTIVE OF MANAGEMENT IN ORGANIZATIONAL PROJECTS

The concept of development management

Many terms are found in the literature to describe the concept of development management. They reveal and imply widely diverging managerialist theories and practices typical of the First World, which are applied in developing countries and influence the structures and even the formation of these countries. Managerialism is a "complex, highly unequal and contradictory" process (Desai & Imrie, 2010, p. 636) that has driven public reforms in new socio-institutional, economic, and political structures in force since the last century. However, this managerialist movement is a concept that merely recreates and perpetuates hierarchical and co-established relationships between actors from the North and the South (Naylor, 2011), despite the end of the colonial times.

For Cooke (2004), this set of theories had been traditionally known as Development Administration since the 1970s with the first works on the subject, until it became known as Development Management or Development Administration and Management (DAM), following the incorporation of other elements into the theme. Indeed, DAM is, above all, an attempt to compile the main organizational studies involving the relationship between first- and third-world countries, with a critical bias for the construction of 3rd World.

Among the different possibilities, Development Administration can be defined as a field of administration aimed at analyzing the management of social relations of production, distribution, and consumption in society (E. L. Santos & Santana, 2010). It differs from the OS field for two reasons: firstly, because its object of study is not organizations but management; secondly, while Organizational Studies focuses on the investigation of modern or even postmodern organizations, Development Management prioritizes the study of societies, countries, regions, and organizations often found in modernity (Cooke, 2004; Gulrajani, 2009; R. S. Santos, 2004). The expression comes from the orthodoxy of administrative thinking in the post-war world, precisely in economic recovery plans – such as the Marshall Plan, the Columbus Plan, or the Alliance for Progress – and the desire of rich countries to technically assist less developed countries through mutual aid programs.

Theoretical construction of the term development management

We must consider that development is regarded as a purpose, whereas management, or administration, is the tool by which the intervention is carried out (as already explained by the evolution of management as a concept in Organizational Studies). Therefore, specifically regarding development, since it is a construct and therefore depends on the administration approach, the term can be detailed based on how it is approached in the literature on Organizational Studies.

According to Cooke (2004), the concept of development administration has "evolved" to development management. Indeed, Thomas (1996) is one of the seminal authors working with relating ideas involving administration and development. This author (Thomas, 1996) addressed the two concepts separately to understand the notions involving both ideas. Based on

the early view of development as a process of historical change, there is not much distinction as to a common view of what development management would be. The relationship between "development" and "management" elements would be the joint approach of concepts and theories about how goals can be achieved in organizations, in addition to the skills and strategies required to achieve development. This initial view of development is associated with an orthodox idea on the subject, as classified by Cooke (2001), which can be summarized in the following items, as in Turner and Hulme (1997, p. 13):

a) Development was based on the notion of governments acting as beneficial instruments of an expanding economy.
b) Development management was synonymous with Public Administration which, in turn, was synonymous with bureaucracy.
c) An elitist tendency was present in the process: an enlightened minority, such as politicians and planners, would be committed to transforming their societies into replicas of the modern nation-state.
d) Developing nations would be to blame for a "lack of administrative capacity to implement plans and programs through the transfer of administrative techniques to improve the central mechanism of government".
e) The adoption of foreign aid is the mechanism by which tools absent from public administration would be transferred from the West for the development of third-world countries.
f) An acknowledged culture in developing countries hampers the functional use of Western tools and the dominant Weberian bureaucracy. Therefore, development management had to "overcome" cultural obstacles perceived as sources of bureaucratic dysfunction.

According to a second view on the subject by Thomas (1996), development management was defined as the management of deliberate efforts in progress by one of the various International Agencies aspiring to fulfill these purposes, thus involving the management of intervention in the process of social change in the context of conflicting goals, values, and interests. Along these lines, since development management depends on "formalized" actions by institutions, it is a process or an activity that can take place anywhere, not just in developing countries. Indeed, four distinctive characteristics of development tasks can be found according to this perspective:

a) External social goals rather than internal organizational goals.
b) Influencing or intervening in social processes rather than using resources to achieve goals directly.
c) Goals are subject to value-based conflicts.
d) The importance of the process for "development," with the suggestion of its appreciation as a starting point and not just as the end to be achieved.

Therefore, according to this second view, no "development" task would be present in development management, as it is generally known, but rather all types of activities, with "tasks" ranging from everyday Public Administration to the exclusive social assistance tasks enforced by these agencies.

A critical perspective on development management

After identifying these crucial factors for conceptualizing the managerialist process involving the development of peripheral countries, we must include the concept of critical success factors in the critical perspective present in the empirical work of Ika and Hodgson (2014). This seminal work reports on aid agencies' experience in identifying Critical Success Factors (CSF) and points to the role of the "managerialism" that this article intends to shed light on.

From a more contemporary approach to analyzing organizational projects by multilateral agencies, the concept of development management aims to materialize development as an approach in constant evolution and under analysis in different continents. Indeed, this is because the meaning of developing countries is not the same now as it was 20 years ago and it no longer corresponds to the notion of development in the years that followed the Second World War (Wolfensohn, 1999). From the convergence of these theories and concepts, developing nations began to integrate new models of managerialism to overcome the difficulties arising from the political and economic transformations of the last century (Murphy, 2008). However, the governments that ruled these countries between the 1980s and 1990s were guided by the production of constant legislative and regulatory actions to fulfill the reform agenda (Martins, 2004).

An analysis based on CSF, the World Bank's performance in public administration projects in Brazil cannot simply point to managerialism as a power in action but primarily outline an "ideal" parameter of managerialist action. However, also suggest a biased or limited performance analysis favoring managerialism when sticking solely to previously established criteria. Therefore, a study of the Brazilian experience, hitherto unpublished from a managerialist perspective in the 1990s, can encompass a critical perspective on managerialism as a developmentalist power.

Whether through initiatives between governments or the intervention of global multilateral institutions, actions aimed at fulfilling these purposes have always followed the practical supervision of the "soft management" practiced by Western and North American countries. However, an element of this form of interaction pointed out by Nye (2004, p. 99) should be highlighted: "many of its crucial resources [such as soft management] are outside the control of governments [of the institutions themselves] and their effects depend heavily on acceptance by the receiving audience." Furthermore, "resources are highly dependent and often work indirectly by shaping the environment for policy, and sometimes take years to produce the desired outcomes."

Indeed, the perspective of applying what is conceptualized as managerialist development from ideal portraits of managerialism, as also used in the theoretical framework found in Brett (2013) and Mowles, Stacey, and Griffin (2008), is also a basis for this study. It is crucial to consider that the Management Projects perspective, featured in the work of Ika (Ika et al., 2012; Ika & Donnelly, 2017), deals with the context of the action of relevant multilateral agencies. Nevertheless, the greater concentration of studies focusing on current trends in development projects seem to address an "international issue" (Picciotto, 2020) but lack details regarding the perceived trajectory of these projects in Brazil and Latin America. Global reporting actions for these economic and political purposes interfere with the "recipient" countries in the cultural formation by directly intervening in ideological points for the functioning of the government and public bodies.

By recognizing the limitations and conducting novel studies for an alternative to "subalterns" in progress based on economic evolution, an initiative has promoted a change of status, at least regarding the country's economic conditions. However, in these projects based on a "civilizable" attempt from a development perspective (McCourt, 2008), the emphasis of the analysis of the critical factors of these enterprises has still been centered on economic aspects, the flow of loans, and capital exchange. Indeed, the analysis of historically collected reports of the World Bank's operations must consider these projects' structural, institutional, and managerialist success conditions (Ika & Donnelly, 2017).

Therefore, to ground the argumentation, legitimation, and dissemination of a subordinate critical perspective of development management – which acknowledges that representing the different worlds and voices existing in Latin America "is no easy task" (Ibarra-Colado, 2007, p. 2) – we argue that the international field of management for the development of third-world countries must contain interdisciplinary elements (Alcadipani & Rosa, 2013) in a first argument, involving, for example, the historical survey of international processes, as well as the specific contextual conditions of the participating actors. These are elements of agent power and the political and historical conditions of the target nation of development projects. According to Williams (2003), evaluating the evolution of a key concept, as is the case of Development Management applied to the critical context of Critical Success Factors, is paramount in studies in the field because these must go beyond economic issues and incorporate ideological aspects as well. Alternatively, as Naylor (2011) points out, ideational and material effects manifest in development policies, programs, and projects. Thus, the conceptual work on the term Development Management not only defines but also legitimizes the theoretical precepts for framing and implementing policies based on the historical analysis of a given phenomenon or region. In the case of Latin America, the phenomenon studied ranges from the conception of nation-states from the independence processes of the western world to globalization, more specifically in the neoliberal interest relations that marked all processes in the late 20th century.

METHODOLOGICAL RESEARCH ASPECTS

From the continuous effort undertaken by the epistemological development of historical research in Organizational Studies, and according to the historical methodology proposed in this article, we must first understand the activities of the World Bank involving managerialist precepts in Brazil through the collection, selection, and documentary analysis under discussion. This paper also aims to introduce arguments about historical research in organizations from the contextual perspective of analysis and discuss how past practices recorded in archives and documents can be analyzed in a digital context. As for these two aspects, the implication of this scenario in the procedural character (Astley, 1989) of the social actions reflected by the identified practices is evident. Indeed, we intend to contribute to the field of historical management studies to reinforce the contribution of New History approaches employed in Organizational Studies (Üsdikem & Kieser, 2004) for the development of documental use for research of this nature, in addition to resources complementary to the historical method, including the archival repository (Barros, 2016; Cook, 2011).

Through the growing interest in Organizational Studies and the increasing number of academic papers (Costa, Barros, & Martins; 2010; Rowlinson, 2013; Rowlinson, Hassard, & Decker, 2014), it has become possible to conduct historical research more appropriately and establish it as a possible framework to investigate organizations and their objectives qualitatively. Indeed, similar to the approximation of Weatherbee, Durepos, A. Mills, and J. H. Mills (2012), this theoretical-methodological approach assumes that the subject and the object of a given fact are no longer regarded as universal and necessary units. Instead, they are constructed through practices and dependent on the historical relationship that determines them. In employing a historical methodology, one cannot say that the study will represent "the story" of a certain object, as it does not start from the "representation of a preexisting object." However, it assumes a possible version of an object (Weatherbee et al., 2012) in light of the historical context in which this object was formed (Rowlinson, 2013) and is grounded on the practices established between it and the subjects involved in a given situation.

The study period is justified by the increase in information about managerialism with the post-Cold War events and neoliberal influence, implying the movement of elaboration and implementation of administrative reforms in 1995, in the first term in office of President Fernando Henrique Cardoso. The 1990s were crucial for the organizational changes implemented in the public sphere and the international aspect, and this decade was crucial for the rise of neoliberal policies and administrative reforms guided by managerialism. From this perspective, the role of the World Bank in working with the Brazilian government is based not only on the volume of loans to be allocated in the country's public sector but also on the role played by scientific and diplomatic arguments regarding national development. With these characteristics of the period as a backdrop, the theoretical model employed here focuses on an interpretive perspective, as the authors have chosen the bibliographic reference method, starting from an analysis of the continuous interpretation of history from the means of accessing the past. By adopting this perspective, the organizational analysis aims to understand the constituent elements of its formation by placing less emphasis on objective perceptions and seeking meanings and possible interactions in the process (Schwandt, 2006).

The researched documents were collected from the official collection of digitized documents of the World Bank Foundation, which implies a methodological discussion about research using digital files. At this point, it is understood that, when considering the notion of archives, it is possible to approach the very concept of storing a series of information or naming where this form of archiving is carried out (Barros, 2016). Furthermore, it is understood that the archival approach ties the ideas together since the reflective analysis involves both the process, such as the act of location and the researcher's place of access.

The discussion about archives in historical research is also based on a practical principle, as the conditions for accessing information are discussed above since archives are the physical and conceptual storage space for documents. However, the set of transformations – in the context of a broader discussion until the present day, mainly due to contemporary points – is related to technological advances (Cook, 2011). In this revolution, technologies have altered the landscape of the information management community as the distinctions between past and present have faded. Also, due to these nuances, it is understandable to re-examine long-established beliefs and practices about information archiving. Barros (2016) points out that, as archives have evolved, especially with the advent of technology, they have changed their composition and how researchers receive them. These transformations do not necessarily imply an exact order, accessibility issues, collection tools, document selection, and narrative research construction.

Collection and analysis of historical data

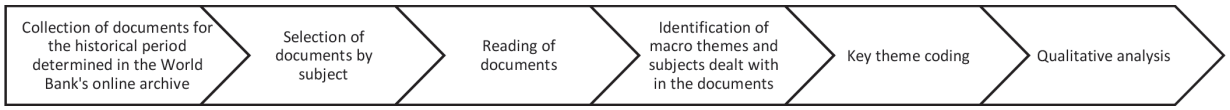
Methodologically, the search for documents in online archives requires a reflective attitude on the researcher's part (Darawsheh, 2014). In documentary research, the practical issue is relevant to understanding how the use of historical documents is inserted in a reflective point of view through research, collection, and selection. In the practice of research with documents, the researcher tries to overcome the superficiality of the issues involved, questioning how the use of these sources is characterized or even why they are located in certain archives. Thus, based on the reality of searching for documents about the World Bank, with the historical archive and the collection of documents fully available online, some points for reflection were adopted for selecting documents to be used as data sources for this research. Above all, this proved necessary because the World Bank archive distributes an official manual on how to search for documents in the online collection to its virtual visitors, in addition to containing details on how each document was selected and preserved for publication.

The documents selected for the research involve representatives of the World Bank, ministers, businesspeople, and government representatives of Brazil in the period studied. Firstly, regarding the World Bank, the official documents in the institution's official online collection, for the 1980s and 1990s, are estimated to consist of approximately 3,000 written pages, not counting unwritten documents, such as photos, and maps, among others. In addition, unofficial documents were included in this scope, such as personal correspondence, notes, and meeting minutes, among other writings. Another very common document type found in this list of documents about the World Bank was the so-called "working papers," related to the discussion process. Although officially published by the institution, these reports presented results and formulations based on analyses of a specific subject or country to encourage discussions and comments.

Based on this extensive documentation list, without the final selection for analysis, for better visualization, the titles, document nature, and year of publication/dissemination were organized and for the World Bank documents, the document numbering code used by the organization itself for filing in the online directory was noted. The documents then went through two selection criteria. First, the documents of the years pertaining to the 1990s were filtered. The second filter considered the titles of the documents, discarding documents that were out of the scope of discussion of the theme.

The collection process can be visualized in the diagram below:

Figure 1
Visual framework showing the overall process and the key steps



Source: Elaborated by the author.

Having established the criteria for collecting the documents for the research, both on the World Bank and on the governmental and legislative decisions of the Brazilian government in the time frame, the document analysis consisted of three phases: (1) formation of an analysis file, (2) coding and quantitative analysis and (3) qualitative analysis.

The first step of the research analysis, based on the results obtained from the World Bank archive and the filters for the prior selection of documents about Brazil, consisted of forming an Analysis Archive. After the prior selection of documentation, it was proposed, at this stage, to create a list of "final" documents to be read in full and analyzed according to the theoretical review studied.

The second phase of analysis was Coding and Quantitative Analysis. At this stage, all 166 documents were read together with the notes obtained from reading the documents. Then, using filter resources embedded in Adobe Acrobat (given that the files were collected in PDF format), some strategic words were searched, among them, the ones most frequently found, firstly, in the Brazilian government documents, and then, proceeding with the search in the World Bank's documents. This procedure revealed that some words were commonly used between the two selections of documents, including "bureaucracy,"

"public administration," "public sector," "development," "project," "growth," "regulation," "labor," "mission," "president," "industrial policy(ies)," "management," "decentralization," "cases," "education and training," "results," "continuous improvement," "legislation," "Brazilian economy," "poverty," "efficiency," among others.

The third and final phase of the documentary research consisted of the qualitative analysis based on the categories that emerged from the documents themselves. The quantitative analysis's primary antecedents were the literature analysis and the perception of the historical construction of the concept of development management. The excerpts identified in the previous phase were reviewed and compared to elaborate the analysis and conclusions. Also, it was noted when they were related to the key elements found in the researched literature on NADAM and the elements that supported the choice of the concept of development management in this study. The coding of documents without any additional software resources is a qualitative aid for contextual understanding and aid in the review of the topics covered, being a personal and organizational marker of the researcher himself and not, literally, of theoretical construction.

On this last point, it is important to mention how the phases built during the methodological process determined the identification of results concurrently with the research analysis. This is why the following chapter jointly covers the results obtained with the final analysis. In historical research, the step of data collection, analysis, interpretation, and writing of the narrative is considered the main stage for theoretical construction in qualitative studies. Therefore, the interconnection between these two stages is vital for the researcher to choose the best method to interpret the facts studied (Firouzkouhi & Zargham-Boroujeni, 2015). Following this principle, the objective was the simultaneous writing of results and analysis as a form of the social construction of meaning mediated by the language identified in the documents, involving social, political, and historical context discovered through codifications and used as a basis for conclusions.

THE HISTORICAL CONTEXT: THE WORLD BANK AS AN ARTICULATOR OF MANAGEMENT FOR DEVELOPMENT

From the theoretical framework of development management through the critical bias of organizational projects as a precedent, the World Bank's approach must be developed in the scope of its multilateral actions as a Think Tank prioritizing development to fight poverty in marginalized countries. This involves carefully analyzing the transformation of the pattern of knowledge regarding development management.

The argument for the performance of the World Bank as a Think Tank organization through public structural projects illustrates the institution's impact on the transformation of policies under development based on the construction of the fight against poverty (Dar & Cooke, 2008). This power of influence can be analyzed in a deconstructive manner based on a logic of dependence through which multiple types of interrelated power operate, involving economic policies and multilateral agencies (Naylor, 2011). This historical chain of actions has ideational and material effects that are manifested in development policies, programs, and projects and perpetuate hierarchical and co-established relationships between these players representing what is developed and what is developing in the world. Based on this order, which is disseminated in its actions and their resonance with the governing functioning of civil society, the Bank's role as a disseminator of an idea on development in the developing countries under deliberation, and a promoter of techniques and evaluations, must delve deeper into contemporary issues, due to the current elements of neoliberalism. Regarding this influence, a tripod seems to support the bank's performance associated with an "education for neoliberalism," namely the neoliberal values, the intellectual aspect, and the influential power worldwide (Berger, 2006).

In a neoliberal reality, regarding development management through organizational projects (Ika & Hodgson, 2014), we argue that imperial concerns with government colonies are replicated in two instances in contemporary governance agendas from the First World to the developing countries. First, there is a supposed concern of Western countries about the management of development with democratization, as this political movement is more consistent with a neoliberal economic agenda and a lack of credibility given the role of development administration in the 1990s (Cooke, 2004). Second, there are demands made by development management for capacity building and participation. Indeed, these elements are based on language and methodologies inspired by the indirect domain, which, in practical terms, are always subordinated to the political and economic agendas of the First World, particularly concerning the debt relief incurred by developing countries throughout the 20th century (Cooke, 2003).

The idea of "poverty reduction," based on a methodology characteristic of the World Bank, acquired visibility in the 1990s as liberal ideas gained momentum (Cooke, 2004). Nevertheless, the World Bank's visibility as an institution is understood in light of the entity's historical context, with implementations initiated under the command of Robert McNamara (from 1968 to 1981). The financing modality "inaugurated" by McNamara corresponds to structural adjustment loans through the implementation, by client countries, of a package of structural reforms and guiding policies, which are neoliberal. This two-way accountability model served as the main financing instrument for the World Bank until the 21st century. The challenge in this contemporary context is to add increasingly complex factors to performance, as pointed out by Leslie, Banks, Prinsen, Scheyvens, and Stewart-Withers (2018).

Through this financing instrument, the World Bank could be sure that developing countries would sustain activities related to the free market and the consequent opening of trade. However, in light of the active American policy against communism in the Cold War period, financing through structural reforms by the free market would be a strategy of immunity in developing continents against those factors that, according to the vision of the global institution, would pose barriers to development (Alcadipani & Caldas, 2012). Indeed, these factors would be the developmental policies adopted throughout the century in these countries, which would harm national structural investments or the government's interventionist policy.

The performance of the World Bank as an articulator of ideas for the public sector in Brazil and developing countries

In Brazil, in the 1990s in particular, an idea of reforms focused on the public sector to improve organizational relations and provide better conditions for the development of the population emerged. As for programs aimed at education and public policies, the World Bank's conviction of its guidelines was based on an argument of "institutional strengthening of the public sector" allocating resources to institutions and the organization state (Waismann, 2013). As for Brazil, the World Bank began to make loans to the country in 1949, and the Bank even referred to the country as one of the institution's main clients for having received more than US$ 16 billion in loans until the 1980s. Most of these financial flows were destined for industrial incentive programs and changes in the education sector (Dar & Cooke, 2008).

In the 1990s, the country received almost U$ 700 million dollars (Cooke, 2014) for structuring and executing projects in the educational sector and for structural government projects related to highways, basic sanitation, agriculture and livestock, and ports. There is a consensus in research (Jones, 1992, 1997) on the role of the multilateral agency in developing countries that the practices built and financed by the institution have, in turn, and as their effective objective, the defense, and maintenance of a current neoliberal project that was then sustained and subtly declared in its projects. This is despite their discourse of poverty alleviation, reduction of social inequalities, environmental protection, among other actions of development.

Regarding the structural projects aimed at the economy and the reduction of social inequality, the World Bank played a vital role in the educational component associated with the structural management precepts. The projects aimed at education in Latin American governments summarized the development management potential of the multilateral organization for marginalized scenarios through the discourse of human development (consequently including the overcoming of poverty), through managerialist principles and technical staff that brought to client countries expressive and impactful returns in the fastest way and for the Bank itself. Through this action, the World Bank would disseminate means based on the primary pillars of its form of management or how it deemed adequate, based on its assistance character, to these nations. The managerialist principles, such as the creation of credit markets, administrative decentralization, and the utmost efficiency in resources, would be in tune in this context (Heyneman, 2003, p. 325), as explained in a passage by Mello (1991, p. 9):

> Unlike most developed countries, those in the Third World need to adapt development strategies to circumstantial situations characterized by: – short-term economic adjustment policies that make it difficult to reach a consensus on long-range goals, such as education; – instability and fragility of the democratic experience, due to long periods of authoritarian governments, which undermine the articulation between political institutions and social players; – unequal growth, which makes technically advanced sectors coexist with others that are labor-intensive and still necessary for the integration of large marginalized contingents of production and consumption; – great inequalities in the distribution of income, and inefficiency and inequality in the provision of educational services.

In summary, the development management by the World Bank in the last decades of the 20th century did not take place in an imposing manner but rather as a two-way relationship based on a diplomatic principle. This was that the global organization and the developing client countries would come out in the agreement and with a common interest for both parties, that is, the structures promoting within a political-economic context of overcoming crises and through financial capital. However, even though it was not direct or even territorial action, the negotiation conditions were sometimes asymmetrical (Pereira, 2006), given that the granting of loans involved discursive coercive methods and was covered by tools that would lead to development associated with modernization. By including poverty reduction through technical assistance and recognized expertise in these discourses, the Bank's methodology would be transformed by this element that was, as we have seen, neocolonial on the part of the institution and, indirectly, of the United States in this period.

ANALYSIS OF CRITICAL SUCCESS FACTORS IN DOCUMENTS ON STRUCTURAL PROJECTS OF THE WORLD BANK IN BRAZIL

Action by the World Bank in Brazil followed a typical model for developing countries, namely, structural projects involving a type of reform for the administrative structures of the State. According to the Bank's precepts, these reforms would encompass both the strengthening of its institutional capacity (planning, control, and coordination) and greater permeability to organized civil society (transparency, participation, and decentralization) (Waismann, 2013). From the Bank's perspective, as a representative of the history of developed countries, the State would not participate in an interventionist way but as a strategic agent in economic development and the modernization of the countries' social structures, aiming at the optimization and efficiency of their resources, regardless of their political and economic orientation.

In the context of globalization, it is understood that the more complex the economic system of a society is (which, in turn, affects the different organizations that comprise it), the greater the need to formalize the transmission of knowledge within these institutional spaces (Murphy, 2008). Based on this prerogative, it is assumed that the World Bank, despite its structural complexity, is deduced in the research as a unit of the object of analysis, as well as the Brazilian government at the time, through representatives and state organizations. Although its plural form is recognized in this unit, there is the storage of historical information, that is, institutional archives with documents about the organization. Not only the documents but the political aspect of the historical archives in the selection and availability to the public of the documents online reveals the scenario in which the World Bank and the government agencies in Brazil acted in the analyzed period.

Due to external events and the changes introduced in the Brazilian State apparatus after 1992, it is possible to identify some elements of analysis from the perspective of development management through the set of actions of the World Bank. Based on these initial prerogatives, the documents from this year onwards were considered outstanding concerning the country's development plan due to three primary initial aspects. These are categorized into three key ideas: successful examples presented by other countries in a comparable situation, poverty reduction discourse, and the attractiveness for foreign investments. These themes guided the categories found in the analysis of documents according to the following organization of categories and subcategories:

Box 1
List of themes, categories, and subcategories of the guiding codes of document analysis

Themes	Categories	Subcategories
Successful examples presented by other countries in a comparable situation	Monetization and Economic Adjustments for Stabilization	
	Reform Idea	
Poverty reduction discourse	Public Sector	Effectiveness
		State structure
		Labor orders
		Privatizations
	Technical Management Knowledge	
Foreign investment attractiveness	Relationship between educational investments and progress	
	Industrial Sector	

Source: Elaborated by the author.

Based on the argumentation patterns identified in the documents, although the World Bank established economic adjustments through incentives to deregulation and privatization as the pillar for the development and stabilization of the country, other foundations of the functioning of the State apparatus were mentioned in documents of the World Bank as contributors to an efficient public sector. This critical success factor would indirectly involve the country's development, and one of the foundations was a "well-functioning bureaucracy." A fully functioning bureaucracy would promote growth and reduce poverty, providing solid regulatory inputs and, at the lowest cost, essential public goods and services.

Based on this triad between development, public institutional capacity, and technical knowledge, the World Bank was directly monitored in the 1990s. Based on this triangulation, projects for Brazil were structured to help strengthen the capacity of the public sector to establish and apply solid public policies, improve the management of government areas, and propose macroeconomic stabilization measures to foster economic growth. The categories and subcategories found in the documents of the global institution were consistent with what was produced in Brazil in terms of managerialist reform precisely because the model applied was for developing countries, as was the case in Brazil at the time. Therefore, the elaboration and application of the management reform based on the Bank's arguments cannot be considered in an imposing term by Brazilian representatives, much less as a direct intervention in the country's government system.

The World Bank managerialist triad, in contrast to the DAM paradigm

Unlike the perception of those interviewed and government representatives in Brazil at the time, the World Bank's performance in favor not only of managerialist reform as a master plan but of a whole movement aimed at restructuring the Brazilian State and economic model was not exempt from biases. According to Development Administration and Management Theory, the role of the World Bank as a global institution that practices "soft management" was identified from that point onwards, including in the successful policy of global control. However, an element of this form of interaction pointed out by Nye (2004, p. 99) should be highlighted: "many of its resources [such as soft management] are outside the control of the government [of the institutions themselves] and depend heavily on acceptance by the receiving public." Furthermore, "resources are heavily dependent and often work indirectly by shaping the environment for policy, and sometimes take years to produce the desired outcomes."

The requirements imposed by the World Bank for the basis of Brazil's development depended on progress in structural and sectoral reforms, including the approval of administrative reform, continued consideration of social security reform, fiscal adjustment, and sectoral reforms in several areas to keep the country within the benchmarks. However, certain risks should not be overlooked, such as a lack of progress in reducing the public sector debt, possible renewed pressure on the current account when growth resumes, and further external shocks and weaker disbursements resulting from fiscal restrictions. The most important of these is the public sector debt since it could directly impact current accounts and the pace of disbursements.

For this reason, macroeconomic adjustments were considered in the documentation as another significant critical success factor, and they have been recurring themes in Brazil's development since the 1980s. Therefore, from the introduction of new sets of fiscal measures to policies of stabilization and defense of the national currency, the World Bank would respond to new challenges with an expanded program of service providers that are not only related to loans in support of structural reforms related to macroeconomics, performance, and growth, including a reduction in the impact on the public sector deficit and the gradual introduction of flexibility in the administration of the exchange rate, as well as the strengthening of the banking system, the deregulation, and decentralization of the excessively bureaucratic model of fiscal policies, and the encouragement of privatization of services and nationalization.

From a theoretical point of view, based on references in Development Administration and Management (DAM), it is understood that the World Bank, through its actions and historical perspective, was not only a mere financial agent in developing countries. Through insights based on the use of the institutional archive, we intend to investigate what underlies the managerialist logic implemented to promote development, in the case of Brazil, through the historical conflict. The management principles were present for the development activities, both for the conception of Brazil and for the conception of the time in the world; however, there are underlying, invisible, or, as the DAM puts it, "soft" elements, which are inherent to options of managerialist reforms in favor of development. As justified by the epistemological stance of research, contextual analyses complement this perspective.

CONCLUSION

The categorization and analysis of documents showed a convergence of themes obtained as critical success factors in organizational development projects with the development management approach used by the World Bank in developing countries. Cooke (2003) had already pointed out that a development management model in the DGA literature for developing country scenarios involved four major themes (Cooke, 2004, p. 67) in the scope of action fronts, namely Structural/Institutional, Social/Human, Physical/Rural/Urban, and Macroeconomic/Financial. Based on this model (aligned with the research and according to the themes, categories, and subcategories found), the analysis of documents from this critical perspective, based on a post-development theoretical lens, confirmed how the Bank works with pilot countries to facilitate the incorporation of development principles following the principles of development management from the following points: leadership behaviors (roles, skills, and attitudes), organizational environment (structure, processes, and culture) and learning approach (learning, context, content, and process).

This reveals an emphasis on managerialism processes according to the managerialist model applied to a model foreseen by the Bank. but hardly emphasized according to the Brazilian context or even with the possibilities available at the time by the former government. Nevertheless, these were guidelines determined by the multilateral agency as the critical factors for the success of the implemented projects. Demonstrations of power by representatives of the World Bank, identified through the analysis codes, were intended not only for the project's success but also to maintain control over the evolution of administrative processes for the coming years. The literature on management projects demonstrates the evolution of the analysis of goals inserted in these projects through Critical Success Factors, listed from planning to monitoring actions in target countries (Ika et al., 2012). Through the documents analyzed on the action of the World Bank in Brazil, not only can these critical factors be perceived, but there was also a continuous development of managerialist reform in Brazil reported in the documents to improve the implementation of the project, and consequently the project's chances of success.

In the World Bank reports, each project was divided according to the target sector, namely loans, established deadlines, explicit recommendations for each stage, and the respective risks of each contract. These designations reinforce the criterion adopted by the World Bank on these themes as critical success factors for projects that transcended the structural aspect and would interfere with the ideological aspect, especially in the context of the period. The critical success factors established by the Bank in its development management projects for the country had two characteristics that differentiated Brazil's reform agenda from other successfully stabilized countries. First, Brazil had initiated structural reforms before rather than after stabilization. While there was evidence of a positive impact on productivity, especially in industry, the country still lacked "broad gains

from structural reform, in the form of a shift to private investment-led growth." Without major noticeable successes along the lines of the Bank, no impulse that could sustain and deepen the reforms was perceived.

Thus, the form of argument used by the World Bank can be complementary to the analysis of the DAM theory concerning the "soft power" applied by institutions of global influence in third-world countries (Nye, 2004), involving important participation from the perspective of the "receiver" to perpetuate the legitimacy (and even the authority) of multilateral nations in this regard. In addition to the approach as a provider of aid, according to the characteristic of the World Bank's performance in studies on development management, the intellectual aspect was seen as a form of argument for discussion and persuasion in cases of developing countries. The approach to learning as a disseminating element is important to note in development management processes, leadership behaviors, and the organizational environment. Moreover, the points would be in constant transition and influence, having a determining time for occurring in countries and institutions.

Through the documentation explored in this study, it is possible to deduce that these principles, as well as the objectives of public management with managerialist principles, were advised even before the reform milestone in 1995 and had been since the 1980s, through evaluation and advice exclusively from the World Bank for the Brazilian situation. However, this research has a limitation since the documents used for this conclusion were available online in the researched context and at the Bank's documentation center. Therefore, we suggest that further research converge documents prepared by representatives of Brazilian politics at the time, contrasting the information provided by the multilateral agency. However, it is still possible to conclude that although the most urgent drive was the implementation of economic stability measures, given the causes of the economic crisis and the political inconsistencies with the then-recent democratization process, the Bank's country reports were targeted at different national sectors, such as water, agriculture, transport, electricity, banking resources and, above all, administrative reforms in the public sector.

The complex activities of the World Bank would involve an action with complementary evidence to the way it was studied in DAM, also involving the Bank's intellectual body, "elite" groups that were co-responsible for the understanding and implementation of Bank-nation projects, and an understanding of its history from client countries, directing resources and timely strategies to each government based on successful examples of development in other nations. In addition, other points of the theory were reiterated from the documentary observations, such as the performance of the World Bank through the discourse of "aid" and a specific approach to the relationship between managerialist means and poverty reduction in client countries, in addition to review considerations and continuous improvement that are always present in the projects.

Therefore, based on the argument by Murphy (2008), one may conclude that the Brazilian case analyzed demonstrated a hegemonic movement in favor of typically globalized managerialist practices that allowed managerialism to be considered a prescription for the development of peripheral nations. However, from the document analysis, it is understood that the institution did not neutrally guide this direction adopted by the Bank towards managerialist precepts since conflicts, divergences, and inconsistencies with the Brazilian government were perceived throughout the process. According to this interpretation, despite the relevance of the political and institutional dimension between countries for the transformations, it is possible to infer that the international context was decisive for this model's creation (or adaptation). It is possible to deduce, even as an invitation to future research in other historical and geographical contexts, that in developing countries, the new management model was related not only to the way of administering public operations but, above all, to the idea of developing nations in need of government infrastructure.

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Adéle de Toledo Carneiro: Conceptualization (Lead); Investigation (Lead); Methodology (Lead); Project administration (Lead); Supervision (Lead); Validation (Lead); Visualization (Lead); Writing- original draft (Lead); Writing- review & editing (Lead).