Projectification of society
A necessary debate

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Proyectificación de la sociedad
Un debate necesario

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THE PROJECTIFICATION OF SOCIETY
A NECESSARY DEBATE

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SUMMARY

Foreword

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The Jean Monnet Chair "*PM² by European Commission. Open, free and common project management framework for all European institutions, companies and citizens. – PM²EU+*" has spent the last three years working to visibilise the PM² methodology created by the European Commission by reaching the greatest possible number of potential users (students, young researchers, civil servants and professionals). During this time, the chair has been working as an agent for change and the exchange of knowledge and experiences related to project management.

These undoubtedly enriching experiences have created an awareness of the growing importance and prominence of project management in society. Recently, the phenomenon known as "projectification" has indeed become more widespread, at different levels and with different outcomes. In fact, there is evidence that links the extent to which a productive sector is "projectified" with its economic growth.

Projectification refers to a greater number of activities being managed as projects, but also to the organisational transformations taking place that illustrate a shift from a functional perspective to a project-based perspective. The term can also be used to discuss the transformation of the behavioural models of workers and even to define how public authorities and institutions shape their short and long-term policies.

In the last few years, the international community has welcomed the phenomenon of projectification by analysing the advantages and disadvantages of a management model that greatly benefits society in general. These benefits stem from the fact that "projectification" focuses on the optimisation of economic resources and actions related to decision making by implementing continuous control and monitoring measures and establishing deadlines, milestones and criteria to gauge the success or failure of these decisions. "Projectification" is also associated with some unwelcome elements, which have been defined as the dark side of projecti-

fication; an issue which needs to be studied and discussed in order to reduce and avoid the influence of these elements as much as possible.

The Jean Monnet Chair PM²EU+ is aware of the interest that projectification is attracting from the academic community, professionals, different levels of government and the general public; it is a form of organisation that is spreading across every possible level of society: micro (individual), meso (organisations), macro (sectors), mega (countries and supranational organisations) and, finally, meta (global level).

Our publication titled *The Projectification of Society: A Necessary Debate* reflects this interest, and it is completely in keeping with the actions of the European Commission Jean Monnet Chair. The objective of these actions is to rigorously address issues that affect, condition and shape the relationships between Europeans and third parties.

The decision to promote a publication of this nature has been a great responsibility given the impact that the Jean Monnet Chair has. Nevertheless, this impact and prestige is precisely what has made it possible to attract a group of internationally renowned experts in different areas of issues related to project management to contribute to the book. Project management requires a diverse approach that can address every aspect involved, and therefore great care has been taken to work with project management professionals from the academic world, the business world and even from institutions and professional associations. Different insights have been gathered from some of these sectors that have made it possible to understand the real dimensions and consequences of the projectification of society as an important phenomenon in today's world.

This has led to the publication of this work made up of eleven chapters that address projectification from extremely different perspectives and provide personal viewpoints that help to build the foundations of a much-needed debate that should improve the outcomes of this phenomenon. Projectification is undoubtedly full of *chiaroscuros* that cannot be ignored if management models are to continue being improved.

The order of the chapters in no way reflects any form of hierarchy or relative importance. One of the lessons that has been learned during the creation of this publication is that project management and the projectification of society require a multidisciplinary approach. The convergence of economic, business, political, social, and of course, individual components are clear. Projectification is a very complex yet fascinating issue, and this publication has approached it as such.

The book starts out with Chapter 1, The Projectification of the Economy (Yvonne Schoper[1] † – University of Berlin). The author addresses the direct relationship between the phenomenon of projectification and economic development. Since projects are a driving force of business and economic development, this rela-

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1. Sadly, Professor Yvonne Schoper passed away at the end of April last year during the IPMA research conference in China. This publication serves as a posthumous tribute and recognition of her work and research on project management."

tionship needs to be analysed in depth so that proposals for possible improvements at every level can be presented.

Chapter 2, Projectification and SMEs (Juan Manuel Domínguez – APGP) analyses the unique outcomes and characteristics of the projectification for small and medium-sized companies. Not only is projectification important in the situations that he describes, but its importance also lies in the specific weight of these types of businesses in most global economies, making it extremely important to make the most of projects as tools for competing in today's world and for learning to execute these projects successfully.

Chapter 3, Projectification and Development Cooperation (Agustín Moya & José Luis Yague - Polytechnic University of Madrid) addresses the phenomenon of projectification in the context of development cooperation projects. The most unique feature of these projects is their vocation for usefulness that is present throughout the project lifecycle; the path taken is as important, if not more so, than the deliverables themselves. As these are projects that focus on the education of communities and whose management is unique, the phenomenon of projectification can permanently affect them and care must be taken to ensure that the management proposals do not condition the expected outcomes. Therefore, strengthening the capabilities of and professionalising the role of development cooperation project managers is of the utmost importance.

Chapter 4, Projectification and Academia (Javier Pajares – Valladolid University) concludes that the projectification of academia enables universities to improve their competitive advantage when responding to the constantly increasing demands of society. It also enables academics to be able to better organise the wide range of activities that make up their teaching work, as well as helping them to create better proposals for public bids and better manage research projects. The introduction of organisational structures, such as Project Management Offices (PMOs), into the field of university management allows university strategy to be developed, setting priorities and optimising management by sharing resources. Awareness-raising and training need to be promoted at all levels to improve the project management competences of both academics and administrative staff (performing as managers).

Chapter 5, Projectification and the European Union (Mats Fred – Lund University; Beata Jałocha – Jagiellonian University; Dalia Mukhtar-Landgren – Lund University) analyses the phenomenon of projectification in the sphere of the European Union and the unique features and characteristics of what are known as "EU-projects". In order to achieve this, an analytical approach made up of three levels –micro, meso y macro– is used that leads to really interesting conclusions on how the EU is being transformed by project-based management.

Chapter 6, Determinants of the Negative Aspects of Projectification (Claudette El Hajj – NTU Lebanon; Dima Jawad – Ontario Tech University) undertakes a study on identifying the determinants of the unwelcome outcomes and effects of

projectification at three levels (micro, meso and macro). It focuses on the impact of projectification on individuals at both occupational and personal levels, concluding that these effects must be considered when management models, which have become more widespread recently, are designed.

The whole of Chapter 7, Projectification of Society – a Sociological Perspective (Reinhard Wagner - Alma Mater Europaea ECM, Maribor, Slovenia) illustrates how projects offer an ideal opportunity for self-fulfilment through intense collaboration with others. Self-fulfilment is more likely to take place when it is built on cultural-cognitive foundations and models of successful projects, and it is less likely to happen when regulations, rules and standards are the determining factors. The chapter also takes an in-depth look at how projectification can be encouraged so that the multiple social challenges that the future presents can be faced.

In Chapter 8, Key Issues in the Management of the Project-Based Organization (Rodney Turner -Civil Engineering School, Leeds University), Professor Turner presents, almost autobiographically, the path taken during many years on which, focused on project management, he has studied issues such as governance, project success, marketing and project management schools in depth.

In Chapter 9, The Dark Side of Projectification: The Flexibilization, Responsibilization and Rationalization of the Projectified Self (Yannick Kalff – Osnabrück University) the author covers projectification from an individual perspective and looks at how this encourages the public to focus on self-responsibility and self-organisation, thus creating projectified beings. This has major consequences which need to be monitored so that unwelcome negative outcomes can be avoided.

Chapter 10, Projectification and Project Management Associations (Martínez Almela - International Project Management Association) helps to create a view that enables project management associations to obtain a better understanding of the projectification process, and, as a consequence of this, a better idea of the importance of the function of these associations within social projectification, as well as the current state and future evolution of this phenomenon.

Finally, Chapter 11, Projectification and Professional Certification (Salvador Capuz – Universitat Politècnica de València) analyses the role and rankings of personal professional certifications in the qualification of workers so that they are ready to face the increasingly projectified world of work.

While going through these chapters, the reader will be able to appreciate the wide range of literary styles employed by the authors, which have been respected in the editorial process. This has led to a publication made up of a whole host of styles, content and experiences; an extremely valuable document which creates a complete map of project management that includes its wealth of positive features and complexities.

When a body of knowledge is constantly expanding and being consolidated, the meaning of every term is defined and shaped by the different studies and research projects that are being carried out.

Therefore, the debate taking place between the authors of the book on the meanings and reach of some words, especially "projectification" and "projectisation", has been incredibly rewarding. This debate is outlined below:

> According to Müller (2009), (the level of) projectification indicates to what extent a company is based on projects and to what extent work based on projects predominates. Therefore, a distinction should be made between projectisation and projectification, even though this has not been commonly accepted (yet). Projectisation is understood as the level of organisation of activities with projects, which is a prerequisite for projectification; the meaning of projectification is much wider, and it encompasses projectisation.

Javier Pajares (Valladolid University - Spain) has shared his opinion that projectisation and projectification do not mean the same thing, but the line between them is quite blurred and at times "dangerous". It is a similar situation to the relationship between the words "credit" and "loan" in the financial sector. The line is so fine that projectification could be used when referring to projectisation, and it is even possible that projectisation could be used when the term required is projectification. A Google search for projectification yielded 31,500 results, while projectisation only yielded 13,500. Therefore, using projectification is generally recommended, except in certain circumstances. However, this is not a conclusive answer to the problem as the results for the Spanish terms (*proyectización* and *proyectificación*) produced very different results: 939 results for *proyectización* and 124 for *proyectificación* (17 February 2023 1:18 CET).

Reinhard Wagner (Alma Mater Europaea ECM) has highlighted the possibilities of artificial intelligence by submitting this question to ChatGPT:

> The terms "projectization" and "projectification" are related to the process of organizing work into projects, but they have slightly different meanings.
>
> "Projectization" refers to the process of organizing work that is typically performed in a functional or departmental context into a project-based structure. This involves the creation of a temporary organization, often with a project manager and team, that is focused on completing a specific project or set of projects. Projectization is often used to improve project efficiency, reduce costs, and increase the accountability and visibility of project work.
>
> "Projectification," on the other hand, refers to a broader trend in modern society where more and more activities are being organized as projects. This trend can be seen in many areas, including business, government, education, and even personal life. Projectification can be seen as a response to the increasing complexity and uncertainty of the modern world, where traditional organizational structures may be less effective.
>
> In summary, projectization is the specific process of organizing work into a project-based structure, while projectification is a broader trend towards organizing more and more activities as projects.

Beata Jałocha (Jagiellonian University) has noted that most scientific publications use the term projectification. This seems natural as it is well known that this term, first coined by Christophe Midler, has inspired wide ranging research on the processes that are driven by projects. When the phenomenon acquired its name, it became possible – according to Wittgenstein, what is named can be known- to start in-depth research on projectification processes.

According to Arvi Kuura, "projectification and projectisation should rather be differentiated from each other." Therefore, the key element that enables the difference between projectisation and projectification to be understood is how we define what a project is:

> –In the case of projectisation the well-known definition of "project" is referred to. This definition understands a project as being a management activity that is limited by resources, time and scope.
> –When projectification is spoken of, the notion of what a project is becomes more complex and unclear. When researching projectification, scientists tend to refer to other types of activities, which are not necessarily defined as projects in the strictest sense of the word: subsidies, co-financing initiatives and personal activities are also often defined as projects.

Furthermore, projectification does not only refer to the number of projects carried out, but to the institutionalisation of projects in society, where projects and activities similar to projects are integrated at every level and in every area of society through beliefs, rules, values, structures and behavioural models. Although the line between projectisation and projectification is blurred, there is agreement on the fact that the first term can actually be measured, while the second one is an umbrella term, a multidimensional socio-cultural construct.

The contributions made by the different authors lead to a consensus. "Projectisation" can be used to refer to the process of organising work that is normally carried out in a functional or departmental context with projects. However, "projectification" is used when organisational structures are changed to move towards a form of management based on projects, at any of the levels studied, as a response to a VUCA (volatile, uncertain, complex, ambiguous) environment. The objective of this is to optimise management and expected outcomes.

This work has been published in a bilingual format, in Spanish and English. This decision was taken so that it could reach a wider audience. English is the predominant language used in academic publications and in the main areas of international economic activity. However, Spanish is the language of the University of Granada and the holder of the Jean Monnet Chair, but it is also a language of major importance in Latin American, and it is fast becoming the second language in countries such as the United States of America, Furthermore, by publishing a bilingual edition, project management terminology from both languages can be

presented in parallel, and extreme care has been taken to use terms that have been agreed upon by the main international project management organisations.

This book is an open access publication, freely available to anyone who wishes to make use of it, only needing to reference it as the source of information. The generation of knowledge greatly enhances the reputations of universities, and as the Granada University is a public institution which was eligible for European funding, the publication could not have been published in any other way.

Finally, we would like to express our gratitude to everyone who has made this publication possible, not only the direct contributors, but also everyone who, during the three exciting years of this project, have helped us to expand our knowledge on project management. We would also like to thank them for being aware of the complexity and importance that this phenomenon represents at every level of our society.

A special mention must be given to Dorothy Kelly, Vice-rector for Internationalisation at Granada University for a large part of time in which the Jean Monnet Chair was held. We would also like to extend our thanks to her team, led by the Head of Internationalisation, Irene Pereira, and all of the other staff at Granada University who have made this publication possible. This book is the culmination of all the teaching, information sharing, research and dissemination activities focused on the European Commission PM² methodology and the growing importance of project management in our lives.

Thank you everyone!

CHAPTER 1

The Projectification of the Economy

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Abstract

Projectification is a phenomenon that can be observed in every actor and in every part of an economy, in every industrial sector, city, community and rural area. Projectification brings benefits for both the private and public sectors as well as for the third sector, as project work optimises the use of the limited economic resources. Projects are a major vehicle for implementing strategies. Transformation processes, automation and the digitalisation of business processes in firms and the public administration are managed with projects. As a consequence, the influence of projectification is continuing rising, and it has major implications at individual, organisational and societal levels in economies all over the world.

Keywords: Projectification; Project-based work; industrial sectors.

1. Introduction

The following chapter shall explain what is understood by this new buzzword "projectification", the reasons why it became a global trend in the last two decades, how this transformation of economies has taken place, where, in which countries and in which sectors of economies this movement happens, the prerequisites for this change, its implications and effects, and, finally, a personal opinion on the future development of this trend.

The term projectification, an amalgam of "project" and "organizational transformation" was invented by Christophe Midler in 1995 when he carried out research on how Renault became a projectified organisation. Projectification is defined as the economic trend of an increase in the diffusion of projects, which is increasingly becoming the normal form of business organisation (Midler, 1995; Lundin and Midler, 1998; Packendorff and Lindgren, 2014). Bredin & Söderlund define projectification

as a move from repetitive production to non-routine work processes and the use of temporary projects (2011). Therefore, projectification refers to the change in the organisational culture of how projects are perceived and managed. (Marnewick & Bekker, 2022).

Maylor et al. state that the focus on a single organisation as a unit of analysis is decribed as 'organisational projectification' (2006), which refers to the 'narrow' definition of the phenomenon (Packendorff and Lindgren, 2014). Over the last decade, a "broader" discourse on the phenomenon of projectification has developed in organisations, societies and even in everyday experiences. (Hodgson et al., 2019). There is "an interest for cultural and discursive processes in a society in which notions of projects are invoked" (Packendorff and Lindgren, 2014, p. 7). Lundin et al. call it 'the project society' (Lundin et al., 2015). In this chapter we refer to the transformation of a multitude of organisations and industrial sectors which together represent the foundation of an economy, the meso level of projectification.

The organisational transformation from project management to projectification is a struggle that organisations experience, and it is described as a "major and profound transformation" (Aubry & Lenfle, 2012:687). This profound transformation focuses on the adoption or adaptation of current project structures, processes, rituals and symbols associated with, for instance, agile (Maylor & Turkulainen, 2019). Projectification is a phenomenon that takes organisations on a journey of increased project orientation and considers projects as a form of organisation, not in a single event but rather as an evolving journey that might take a number of years. The destination is a fully projectized organisation (Marnewick & Bekker, 2022). Projectification fundamentally changes the orientation and design of an organisation (Maylor and Turkulainen, 2019). This phenomenon occurs in every industrial sector, and in every type of organisation, country and economy (Packendorff & Lindgren, 2014). In the last decade projectification has become a buzzword for describing this widespread phenomenon in today's economies (Schoper et al, 2018).

The term *economy* defines a social domain that emphasises the practices, discourses and material expressions associated with the production, use and management of scarce resources (James, 2015). Culture, values, education, technological evolution, history, social organisation, political structure, legal systems and natural resources are the main factors of an economy. These factors give context and content, and they set the conditions and parameters for a functioning economy. In other words, an economy is a social domain of interrelated human practices and transactions that do not stand In conclusion, it can be stated that the projectification of an economy can be described as the transformation that involves the increasing diffusion of projects and project-based work in all economic domains.

2. Projectification of the Economy

The next paragraph aims to understand what projectification means for the different national economies. To understand the extent of this transformation in every type of organisation in every industrial sector, it is important to substantiate this development with data and facts, and not rely solely on subjective feelings. By comparing the projectification data available from three European countries and one African country, conclusions for future developments can be derived.

"Popular conventional wisdom tells us that the prevalence of projects is on the increase, and everyone can observe that the society that surrounds us is already 'projectified', at least in a partial sense" (Lundin, 1998, p. 13). Organisations adopt and scale agile in such a way that the entire structure and culture of an organisation change and become projectified. At the heart of projectification are the projects, which are made up of the key actors, and they have a very influential role (Aubry & Lenfle, 2012). Projects have evolved over the last few decades from technical or engineering-based examples to become strategic in nature (Marnewick & Bekker, 2022). The rationale behind this transformation is that the more projectified an organisation is, the more it will achieve, and it will be able to apply its strategies.

2.1. *Reasons for increase of Projectification of economies*

Several factors have caused the change from the "old economy" to the "new economy", and globalisation and digitalisation are among the most important of these. This fundamental change in economic structures corresponds with the change in organisation at a company level (Eckstedt, 1999; Powell, 2002). New organisational formats have been required that are more flexible but, at the same time, highly efficient and less dependent on hierarchical control and bureaucratic coordination.

This organisational transformation towards projectification has been driven by the notion that projectified organisations are more agile, flexible and innovative (Marnewick & Bekker, 2022). This is especially true for technology-driven organisations like financial institutions, car manufacturers, IT companies and in the aerospace industry.

The assumption is that, with projectification, organisations and, as a consequence, national economies are supposed to become more flexible and innovative. In addition, projectification will increase the capacity of organisations to solve complex problems.

The reasons for the projectification of organisations and, therefore, economies can be found in both external environmental factors and in the internal development of organisations.

Current megatrends like digitalisation, climate change, demography, urbanisation, economic growth, energy consumption, connectivity and geopolitics (ESPAS,

2023) have led to high levels of volatility, uncertainty, complexity and ambiguity in the external environmental factors that affect organisations. With a sufficiently large number of competent project managers, an organisation or national economy will be able to better deal with the changes and transformations in today´s rapidly changing environments.

According to Schoper & Ingason (2023), other reasons for the increase of projects in organisations is the maturity level of companies. One reason for this is that the term "project" is not used in a consistent manner. Sometimes, the term "project" is used to describe a unique and complex endeavour.

In some organisations the project definition depends on the duration of the unique task. In other organisations, it depends on the number of people involved in an assignment. In most organisations, it depends on the uniqueness of the scope, e.g. to create a vaccination centre for 5,000 people per day within twenty days.

Furthermore, it can be observed that if an assignment is called a "project", it sounds more attractive as it seems to give more individual responsibility than a regular "task". Bosses are well aware of this, and they frequently use the term "project" to motivate their employees, even if an assignment is simply a normal task.

In addition, there are deeper reasons for the increase in projects in organisations. One important explanation for the phenomenon is that routine work is steadily decreasing due to the ongoing automatization and digitalisation of standard processes in organisations, in several areas such as HR, production, sales and logistics. Consequently, more resources are available and they can be used for project work.

Another reason for the increase in projects is that products and systems that were created and that are successful on the market need to be developed further, in keeping with the expression: "product success leads to follow-up projects". E.g. a smartphone manufacturer has to develop a new successor to its bestselling phone as the original product is responsible for a high percentage of the company's turnover. After one year, the current model's sales will stagnate. The organisation needs a successor with new innovations that needs to be as successful as the preceding model. Production facilities that were built for the earlier model need to be utilised in new ways, R&D employees need new challenges, marketing and sales need a new product and logistics need to use their complex IT systems. The success of the previous product forces an organisation to create another successful product. Projects are the engine that keep an organisation running and growing in the best possible way. Without projects, an organisation stands still, and that means backlog.

The fifth argument is that projects are creating the future. Projects are vehicles of transformation and change. On its own, the corporate strategy of the executive board of a firm is worthless if no projects are undertaken to transform ideas into something real: a sustainable new product, a new website, innovative customer

service, the acquisition of another company, new office buildings, a new market-
ing campaign, new supply chain processes or the implementation of new working
methods. Innovation is created by using projects. Projects or programmes are
needed to carry out and implement every corporate strategy.

A further argument is that projects are the means used to bring together a
diverse range of experts, from different organisations, departments and functional
areas. Today´s endeavours are so complex that a group of different specialists is
needed to cope correctly with all the different aspects of tasks, like financial, legal,
engineering and IT. Diverse project teams ensure diverse thinking and better de-
cision making and this generates innovative solutions.

And finally, the more projects an organisation executes efficiently and effec-
tively, the more successful the organisation will be. Companies with high levels of
innovation success show an above-average share of project activity (Zaman et al.,
2020). In other words, less successful companies do less projects.

It can be concluded that the application of project management makes organ-
isations more flexible and innovative, increases their capability to solve complex
problems and to deal with the changing environment. There can be no future cor-
porate success without projects. More and more executives understand this reality
and consequently implement and foster the project management capabilities in
their organisations. This is the reason why this rapid increase in projects can be
seen in organisations worldwide. I Not only does increasing projectification have
an impact on the competitiveness of an individual firm, but it also reflects the
economic development of an entire economy.

2.2. *The quantitative and qualitative dimension of projectification*

The projectification of an economy includes a quantitative and a qualitative
dimension. The quantitative dimension is related to the share of work done in
projects within firms. Increasing projectification at a firm level shows that the
share of project work is rising, whereas the share of "normal" or "ordinary" line
work that takes place in the permanent part of an organisation is declining. In
this quantitative sense, projectification can be considered as being a ratio that
indicates the share of project work in an organisation. If projectification does not
only take place at the level of an individual firm, but in all the firms belonging to
a sector, an industry or an economy, the entire industry or economy can be said
to be "projectified". Summed up, the projectification ratios of different national
economies can be aggregated on a global scale. PMI estimates that by 2027, em-
ployers will need 88 million individuals in project management-oriented roles
(PMI, 2017). Global statistics indicate that 3,451 billion people over the age of 15
were employed worldwide in 2021 (Destatis, 2021). Thus 2.5% of all employees
worldwide will be working in project management-oriented roles, which seems to

be a rather conservative estimation. However, this figure indicates the increasing relevance of project managers for national economies.

The qualitative dimension of projectification corresponds to the qualitative development of the work that is executed in companies and organisations. The increasing application and usage of projects makes organisations more flexible, more innovative and more capable of solving complex problems, as well as beingless rigid (Hanisch & Wald, 2017; Hodgson, 2004). Equally, projectification leads to a change in the predominant logic of coordination and control. Projectified organisations are supposed to be less hierarchical, less bureaucratic and coordinated by less formal mechanisms such as role-based coordination, networks and trust (Modig, 2007).

Figure 1 shows the quantitative and qualitative dimensions of the increase in the projectification of economies:

Figure 1: Projectification as a quantitative development and a qualitative development (source: Wald et al., 2015)
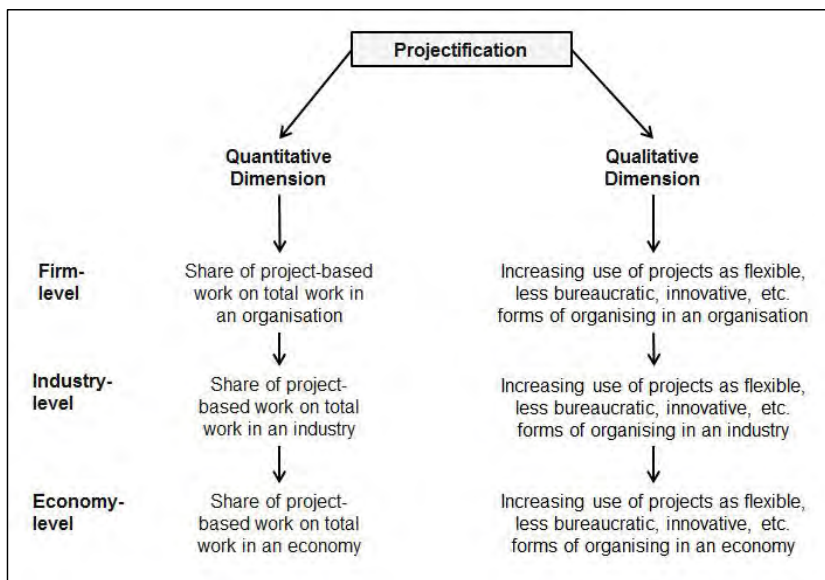
A high quantitative ratio of projectification is the prerequisite for the qualitative development that has a major t impact at the levels of a firms, industries, and economies..

"While standardisation has been described as a central feature for industrialisation and mass production, project management has been found to be the engine of change and innovation" (Cerne & Jansson, 2019). Projects are seen as vehicles for implementing strategy, change and transformation in organisations. But are

organisations, and consequently national economies, more agile, faster and more successful? This question can still not be completely answered due to the complexity of the influencing factors. However, some arguments for the increase in projects in organisations shall be presented in the next chapter.

2.3. *Challenges of measurement of projectification*

Measuring the share of project work in an economy would ideally be based on established macroeconomic measures of the value-added, such as the gross domestic product (GDP), the gross national product (GNP) or the gross value-added (GVA). This would mean that the share of project work could be directly compared to the GVA or GDP. However, this methodology faces some challenges. In general, each project directly or indirectly influences the performance, output, outcome and value of an organisation. This impact is easily measurable in the case of external client projects that create direct revenue but is difficult to quantify in the case of internal projects. Any revenue directly attributable to any project in an organisation would need to be recorded to obtain an output-oriented measurement of the project work in an organisation. However, this measurement would would only be applicable for projects which led directly to revenue. Internal projects such as change projects, or infrastructure projects like the construction of a new office building or the installation of a new IT system would be ignored as they would not directly lead to an increase in revenue. Therefore, a projectification measurement methodology based on project output factors cannot be developed(Schoper et al, 2018).

The share of project work in an organisation was identified as an appropriate indicator for projectification. This input-oriented measurement can be applied to all types of projects, e.g. revenue generating external projects and internal projects. Moreover, this measurement can be applied to all kinds of industries, and it is independent from organizational factors (size, structure, etc.). This measurement was consistently applied to all the national economies that were included in this research.

When measuring the degree of projectification quantitatively, Wald et al. decided not to measure the output, but the input of project work in a firm, as shown in figure 2 (Wald et al., 2015).

Figure 2: Input- vs output-based measures (Source: Wald et al., 2015)
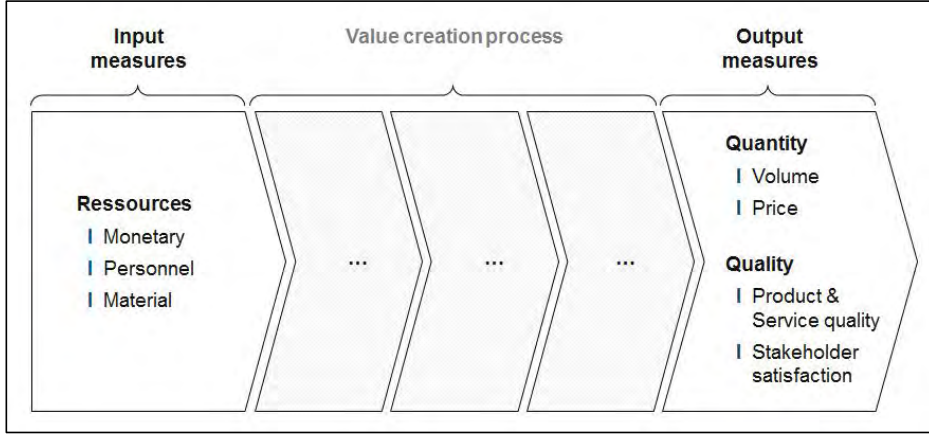
An increase in projectification at a firm level indicates that the share of project work is rising, whereas the share of normal work in the permanent departments of an organisation like Purchasing, Production, Logistics, Human Resource Management, Finance, and Controlling is consequently declining. Therefore, projectification is considered as the ratio that indicates the share of project work in an organisation. This has resulted in figures of projectification on a company level. The projectification of a company, is indicated as PF_i.

The projectification PF of an individual economic sector, $j, (j,…,m)$ has been calculated as mean of all firms, i, in a sector, j.
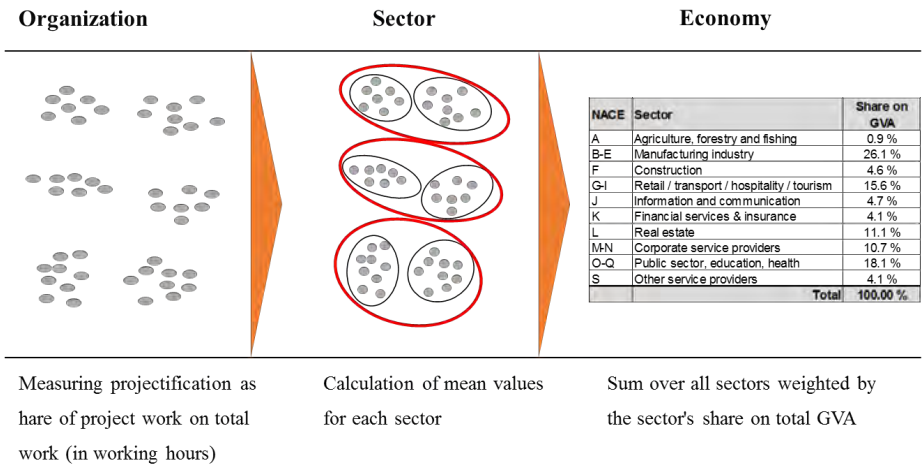
(1) $PF_j = \dfrac{(\sum_i^n PF_i)}{(n)}$ for all i $\in$ j

Finally, the projectification PF of an entire economy, e, was obtained by adding together the projectifications PF_j of all the sectors weighted by each sector's share, on σ_j the total GVA.

(2) $PF_e = \sum_j^m PF_j \cdot \sigma_j$

Figure 3 provides an overview of the process of data aggregation.

Figure 3: Process of data aggregation (Source: Wald et al., 2015: 26)

Organization	Sector	Economy

NACE	Sector	Share on GVA
A	Agriculture, forestry and fishing	0.9 %
B-E	Manufacturing industry	26.1 %
F	Construction	4.6 %
G-I	Retail / transport / hospitality / tourism	15.6 %
J	Information and communication	4.7 %
K	Financial services & insurance	4.1 %
L	Real estate	11.1 %
M-N	Corporate service providers	10.7 %
O-Q	Public sector, education, health	18.1 %
S	Other service providers	4.1 %
	Total	100.00 %

Measuring projectification as hare of project work on total work (in working hours)

Calculation of mean values for each sector

Sum over all sectors weighted by the sector's share on total GVA

If projectification takes place at every level of individual firms and between all the firms in each industry and in every sector of an economy, an entire economy can be said to be projectified.

To conclude, a direct measurement of the share of project-based work in national indicators such as GVA or GDP seems to be ruled out (the necessary data do not exist for either input or output-oriented measures). Therefore, an alternative form of measurement that includes every type of project and every kind of industry was decided by using the results of surveys based on large data samples. These macroeconomic measurements are very complex and expensive.

2.4. *Presentation of four national economies: Germany, Norway, Iceland and South Africa*

The first country to start the macroeconomic measurement of its national economy was Germany in 2014. Thanks to the funding from the national project management association GPM Deutsche Gesellschaft für Projektmanagement e.V. first, the measurement instrument for projectification was developed by Wald et al. (2015), and then it was applied to the German economy. This study was replicated in Norway (Wald et al., 2016) and Iceland and later in 2018 in South Africa (Marnewick & Bekker, 2022) with the financial support of IPMA, the International Project Management Association. In this chapter we will summarize and consolidate the findings of the four studies. The objective was to compare the degree of projectification in the four different economies.

In order to ensure consistency and comparison between the four national studies, the measurement instrument for projectification developed by Wald et al. (2015) was used for all four research studies. The same questionnaire was used in each of the four countries that are part of this large research project.

In Germany, a professional research organisation was contracted to draw a stratified random sample based on the NACE classification with ten main industrial sectors. 500 interviews with executives in private and public organisations were conducted via CATI (computer assisted telephone interviews) for six major economic sectors. The remaining four economic sectors were estimated based on interviews with experts.

In Norway, the data collection was carried outby distributing the survey via email to all of the 54,101 companies registered on the Proff Forvalt database, which resulted in 1,412 usable responses. As it is the main industrial sector in Norway, oil and gas was considered as a separate sub sector. Construction was put together with other service providers, corporate service providers and property and accommodation.

In Iceland, the collection of data was conducted by sending emails to 1,000 of Iceland's largest companies, followed by telephone interviews carried out by a professional research company. The final response consists of 142 companies with an average size of 125 employees.

In South Africa, a professional research organisation was contracted to collect the data from executives as they were able to provide an overview of each organisation's revenue, profits and project budgets. A total of 303 valid responses were collected and used for data analysis. The responses came form303 different organisations in the South African economy.

The four countries, Germany, Norway, Iceland and South Africa, are a diverse sample of four national economies, and Germany is the fourth largest economy in the world. Norway ranks at 28, followed by South Africa at32 and Iceland, as it is a very small economy, at 106. Table 1 compares the four national economies studied by considering themajor industrial sectors, the size of the population, the Gross Domestic Product (GDP) produced in 2021, the economic growth rate within the last five years, the national unemployment rate and the Human Development Index (HDI). The HDI was created by the United Nations to emphasise economic growth should not be the only criteria used for assessing the development of a country, its people and their capabilities should also be considered . Countries with a HDI score of above 0.8 have stable governments, widespread affordable education and healthcare, high life expectancies, good quality of life, and a growing, powerful economy (source: UN Human Development Reports, 2023).

Table 1: Macroeconomic country profiles of Germany, Norway, Iceland and South Africa

	Germany	Norway	Iceland	South Africa
Location	Western Europe	Northern Europe	Northern Europe	Sub-Sahara Africa
Major economic industry sectors	Automotive, Electrical Engineering, Chemical, Machinery and Equipment	Oil and Gas, Seafood, Products from Energy-intensive Industry	Tourism, Fishery, Aluminium	Mining, Transport, Energy, Manufacturing, Tourism, Agriculture
Population	83,2 m	5,4 m	0,37 m	59,4 m
GPD (2021)	4225 b	482 b	5,5 b	419 b
GPD/capita	€51 k	89 k€	68 k€	7 k€
Macroeconomic Rank	4	28	109	32
Average economic growth rate (last 5 years)	1,1	1,8	1,4	0,7
Average unemployment rate (in %)	3	3,2	4	33,9
HDI (Human Development Index)	0.942	0.961	0.959	0.71
HDI Rank	9	2	3	109

Table 1 shows the wide-ranging diversity of the four national macroeconomies of Germany, Norway, Iceland and South Africa regarding their population size, economic performance, major industrial sectors, unemployment rate and Human Development Index. As a consequence, it can be concludes that each of the four countries is a representative sample of the 195 national economies.

The four national economic studies provide empirical data on the project landscapes in organizations. The data from all four economies shows that most of the projects in organizations are internal, whereas the visible, external projects which are carried out for external customers account for only 16%-22% of the projects executed. This finding is important as it shows that most projects are internal projects which go unnoticed by the public. The more visible external projects represent only a smaller part of the entire project landscape of a firm. Famous failures e.g. of large infrastructure projects reported by the press and subject to public debate

might therefore not be representative cases for assessing the general state, quality and success of project management in companies and, consequently, in an economy (e.g. Brady and Davies, 2010).

The most common internal projects in Germany are marketing/sales projects (22%) and IT projects (20%), whereas R&D and new product development projects are less common(13%). R&D projects are rare in service-oriented sectors (10%) but they are twice as important in the manufacturing industry (22%). The same applies to external projects which are most common in manufacturing and in the ICT industry.

In Norway, internal projects make up a total of 78% of all the projects carried out, and the most common categories are R&D and new product development. External projects are most commonly found in the sector of Service Providers (including construction, real estate and corporate service providers), as well as in ICT.

In Iceland, internal projects make up 87% of all the projects carried out, there is no difference between the different types of internal projects. External projects are most commonly found in the manufacturing industry, financial services, insurance and the service provider sector.

In South Arica, most of the projects carried out are internal R&D projects. External customer projects make up the third largest part of all the projects conducted. The lowest ranking type of projects are internal information technology (IT) projects (Marnewick & Bekker, 2022).

In Germany and Norway, the ratio of external projects in the manufacturing industry is relatively high (24% and 25%) whereas in Iceland this ratio is 17%. External projects make up 16.7% of all the projects conducted in South Africa, whereas Iceland has the lowest share of external projects at 13%. As a potential explanation, the dominating manufacturing industries in South Africa are mining, transport and tourism, and in Iceland it is aluminum processing. These are all industries which are predominantly based on more repetitive tasks and which are therefore more process-oriented. However, to better understand this observation, more qualitative and quantitative research is needed in the future.

2.5. *Status of projectification in Germany, Norway, Iceland and South Africa*

The share of project work of the total working hours in the first study in Germany in 2013 was 34.7 %. In Norway, the macroeconomic study shows a project share of 32.6 % one year later in 2014, and 27.7 % in Iceland in the same year. Five years later, in 2019, the share of project work of the total working hours in South Africa was 39.3 %.

These four values indicate that about one third of all economic activity in the four economies studied is carried out with projects. As no similar studies have tried to measure the degree of projectification of an entire economy, these results can

only be compared to the estimate given by the World Bank which states that 21 % of the global GDP was generated with projects (Scranton, 2015).

Figure 4 shows the share of project work in the national economies of Germany, Norway, Iceland and South Africa

Figure 4: Share of project work in the national economies of Germany, Norway, Iceland and South Africa (source: Schoper et al 2018; Marnewick & Bekker, 2022)
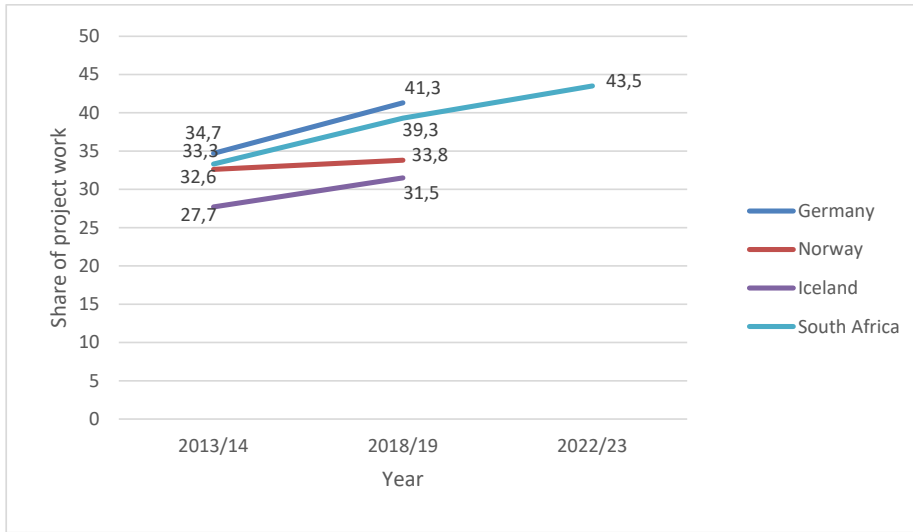
2.6. *Analysis of projectification in different industrial sectors*

Although the four national economies studied show, at first glance, quite similar results with an average projectification share of 37% of the national GPDs in 2018, the analysis of the industrial sectors in each of the four economies shows far more diverse projectification levels.

When comparing individual sectors in each of the four countries in table 2, we find major differences. In Germany and Iceland, the project shares for construction (80%) and corporate service providers (60%) were estimated by experts. In these sectors the experts assumed that the value added is almost exclusively created with projects, and only administrative processes are performed in non-temporary settings. The findings in South Africa for construction (64.4 %) and corporate service providers (53 %) show that these estimations are plausible. There are no detailed figures for these two sectors in Norway.

The same projectification estimation based on the findings of industrial sector experts took place in the sectors of agriculture, forestry and fishing in Germany and Iceland. In these sectors, the projectification level was assumed to be low

at4 %. The much higher findings for agriculture, forestry and fishing in Norway (28.6 %) and South Africa (20.1 %) are plausible as their economies are highly dependent on the sectors of agriculture, forestry and fishing, and they are therefore more professionally organised than in Germany. For Iceland, where the sectors of agriculture and fishing also play an important economic role, these estimates should be controlled in a future second study.

For the industrial sector of real estate, experts estimated that most of the processes are repetitive and administrative, and therefore the projectification level in Germany is very low at 2 %. Again, Iceland also had this low estimation for their national economy. However, the more recent results from South Africa from 2018/19 show a projectification share of 25% in the real estate sector. It can be assumed that the share in the other three economies might also be higher than previously estimated .

Major differences can be observed in the manufacturing sector: Iceland has a very low share of project work (3.4 %), whereas Germany (41.7%) and Norway (47.2 %) rank quite highly. In Iceland, the manufacturing sector contributes 8.9% to the national GVA, but it is less diverse than the manufacturing industry in Germany. In Norway and South Africa, the manufacturing sector was broken down into manufacturing and oil and gas. For oil and gas, the share of project work is 50.7% and 34.4 % in South Africa. These results show that a more detailed analysis of the industrial sectors and their major sub-sectors should be carried out in future research.

Further interesting differences could be found in the sector of retail, transport and tourism. Germany has a high projectification rate of 42 %, whereas Norway has a low rate with 13.4 %. One reason for these differences might be the different population sizes and the resulting professionalisation of the sector. But once again, more research is needed to better understand the differences in this sector.

Further differences can be found in the public sector, education & health. In Norway, the share of projectification is only 14.2 % and 17.8 % in in Germany, whereas Iceland has a much higher share of 33.3 % and South Africa is at 35.3%. Again, more research is needed to better understand the differences in this special industrial sector.

Table 2 shows the exact shares of project work in the different industrial sectors in each of the four national economies studied:

Table 2: Shares of project work in the different industrial sectors in the national economies of Germany, Norway, Iceland and South Africa

NACE Code	Industrial sector	Share of project work			
		Germany	Norway	Iceland	South Africa
		2013	2014	2014	2018
A	Agriculture, forestry+fishing	4,0%*	28,6%	4,0%*	20,1%
B-E	Manufacturing	41,9%	37,6%	3,4%	37,2%
	thereof Oil&Gas		50,7%		34,4%
F	Construction	80,0%*		80,0%*	64,4%
G-I	Retail/transport/tourism	42,0%	13,4%	18,2%	32,1%
J	Information+ communication	37,7%	48,0%	47,8%	49,0%
K	Financial services + insurance	23,0%	21,4%	34,2%	33,3%
L	Real estate	2,0%*		2,0%*	24,9%
M-N	Corporate service providers	60%*		60,0%*	53,0%
O-Q	Public sector, education, health	17,8%	14,2%	33,3%	35,3%
S	Other service providers	23,0%		42,7%	48,1%
S+F+L+ M+N	Other SP+ corporate service providers+ construction		40,5%		
	Mining				32,0%
	Total	34,7%	32,6%	27,7%	39,3%

Legend: * means that the specific value is based on the estimations of national experts"

The studies tool place at different times over a period of five years, with the first study taking place in Germany and the last study being carried out in South Africa. Nevertheless, this difference in timing cannot explain the large differences found between the different industrial sectors in the four economies analysed. More qualitative and quantitative research is needed on all of the industrial sectors to better understand the status of projectification and future developments.

3. PREREQUISITES AND IMPLICATIONS OF PROJECTIFICATION

As business environments become increasingly complex, organisations face increasing uncertainty. Corporate pressure for more efficiency and innovation is also intensifying as global competition increases. These factors are combined with the fact the amount of resources available to companies has gone down as a result of cost pressure and a shortage of skilled workers in most developed economies. One major consequence of these challenging environmental conditions is the increase in the project-oriented mode of value creation in organisations. This transformational change means that firms today are faced with changing organisational structures and workforces which reflect the temporary shifting nature of work. Being shaped

and reshaped has become the new normal in firms. As a result, organisations have become places of continuous restructuring (Wilkinson, 2022). Projects have become associated with development and innovation, but they are also associated with the notion of control, clarity and output. This duality makes projects highly attractive for organisations (Fred, 2020).

3.1. *Pillars of projectification in economies*

The increasing projectification of economies is influencing different stakeholders and is also influenced by them. These stakeholders include individuals, organisations, organisational networks, social norms, standards and beliefs. (Wagner et al, 2021).

Scott´s Institutional theory can be used to define an economy as also being a system of "regulative, normative, and cultural-cognitive elements that, together with associated activities and resources, provide stability and meaning to social life" (Scott, 2014: 56).

This regulative pillar focuses on the ability of institutions to constrain and regularise behaviour and compliance (or non-compliance) with rules can be monitored and sanctioned by state authorities. The normative pillar emphasises rules that prescribe rights and privileges as well as responsibilities and duties, based on the acceptance of norms, standards and behaviour. Non-compliance can lead to exclusion from a social group. The cultural-cognitive pillar focuses on the shared assumptions that constitute the nature of social reality and the framewworks within which meaning is made. It describes the beliefs, perceptions and attitudes shared by the members of a group. The actors in a group might be unaware of these factors, but they affect communication and collaboration and lead to compliant behaviour from these actors. Intermediaries play an important role between these three pillars of institutional theory and these actors include government agencies, private and public firms, industrial associations, trade unions, universities and professional associations (Scott, 2014). Social, economic and political factors constitute the institutional structure of a specific environment which provides firms with an advantage as they can engage in specific types of activities. Organisations will perform more efficiently and effectively if they receive institutional support.

Regulative actions in an economy are legislation and the development of laws and regulations that affect project-related work and the dissemination of projects in an economy (Wagner et al. 2022). An example for this would be if a government prescribed a specific educational standard of qualification and certification for the project professionals in public projects, such as infrastructure or public administrative projects. These regulative measures could go as far as creating regulations that make education in project management mandatory for students in some specific subjects.

Normative action that fosters the projectification of an economy should be a standard that is utilised for education, and a certification standard should be established for public projects, the prescription of project-management standards that are funded by the public or the government and specific project-governance standards for public projects. A further normative measure could be to offer project-based learning to pupils and students in schools and universities. Another normative action could be the creation of a project management ladder in public organisations and public administrative bodies.

Cultural-cognitive actions for fostering the projectification of an economy could be the use of project, programme and portfolio management language and a project mindset by state officials and journalists in the press or transforming the project managers of important public projects into role models. This diverse set of examples of possible institutional measures have the potential to positively influence the an economy at a projectification level.

3.2. *Implications of projectification*

Projectification has an impact on every part and every actor in an economy: its institutions and organisations, but also its culture and education system as the previous chapter on institutional theory showed. The pressure to continuously innovate in organisations forces projectification on every stakeholder and institution in an economy.

In their macroeconomic study, Henning & Wald showed that projectification has positive effects on the economy in terms of production volume, innovative capacity, profitability, employment and income. However, they also showed that projectification can have negative effects, which can be observed in sectors such as agriculture, where the increased use of projects can lead to a decline in employment and even in income. One of the main implications of projectification is that the use of temporary forms of organisation cannot be recommended without limitations. It suitability depends on the economic sector in which they are used and sectoral interdependencies. (Henning & Wald, 2019).

The transformation of a traditional economy into an increasingly project-based, non-permanent economy includes areas of uncertainty, new dynamics and a redefinition of the traditional roles of employers and employees. The traditional understandings between employees and employers may be changing. More and more people are likely to become self-employed as project workers. Instead of working for an employer, individuals could sell their services to intermediary entities and this contractual relationship would be formalised in non-traditional formats. In the best-case scenario, this new economy could be a good development as people would be able to choose their projects based on their skills and knowledge.

However, there are many negative consequences of this trend, e.g. the loss of employment rights, like payment for sick days, maternity leave or planning insecurity in a job market in which people would not know what would happen after they delivered their project. This would be a market in which people would take a risk and take on too many projects to avoid being out of work, thus increasing stress levels . People would be forced to take more self-responsibility in different areas, e.g. training, professional development and continuous education. The role of the traditional workplace as a social institution would change as a consequence of projectification. The social and societal consequences of the loss of this institution are still unclear.

Jacobsson and Jalocha define four emerging images of this omnipresent trends towards projectification: projectification as a managerial approach, projectification as a societal trend, projectification as a human state and projectification as a philosophical issue (2021). These four perspectives show that the phenomenon of projectification, which once derived from an organisational, managerial perspective, today represents an increasingly important part of the lives of individuals, organisations, economies and societies.

Concerning projectification, the "level of analysis has grown from a case where projectification was solely acknowledged as a structural trajectory in organizational restructuring, toward viewing projectification as a fundamentally socially changing phenomenon with complex consequences" (Jacobsson and Jalocha, 2021:1598).

4. Outlook

Digitalisation and automation lead to a decrease in functional work also in process-oriented companies. This circumstance corresponds to the fourth phase of organisational transition analysed by Midler, which deals with the transformation of organisational processes into a balance between functional work and project work (Midler, 1995).

A major question is where and when will the saturation point of projectification be reached in different firms and, consequently, in industrial sectors?

The highest share of project work measured in these studies is in the South African construction industry at 64,4 %. We assume that the saturation point in this already highly projectified sector might be at about 80 %. Corporate service providers like consultancies will also be able to automatise most of their repetitive processes, which will lead to a very high degree of project work. The same applies to the manufacturing industry and to the oil and gas sector. It seems that the level of project saturation is already quite high in these sectors. The projectification in these areas increased by 11% between 2010 and 2014 in Norway, and it is expected to stay stable at 51%. The high share of projectification in the oil and gas sector is explained by the constant need for exploration to find new sources, and this is carried out with projects.

The highest increase in project work in the last few years has taken place in the retail, transport, restaurant, hotel and tourism sector with a total increase of 50% in Norway, starting from the low level of 9% in 2010. Another high project share increase has taken place in the information and communication sector. The share was 35% and had grown to 51% in 2020 in Norway.

A major difference between the German, the Icelandic, the Norwegian and the South African sectors lies in the share of project work in agriculture, forestry and fishing. We put forward the hypothesis that the more important and complex a specific industrial sector is in a country, the higher its share of project work is.

Finally, an important difference between the economies studied is in the public education and health sector. This sector has undergone major organisational change by becoming leaner, more digital and more flexible, and most of the organisational change processes have been carried out with projects.

Winch et al. investigated the socio-economic implications of the Covid-19 pandemic (2021). Project organisation played a central role in every sector, including the identification of therapeutic drugs for COVID-19 treatment; the development of mass-scale test and trace systems for infection control; the design and implementation of economic support schemes for individuals and businesses; the procurement and distribution of personal protective equipment to hospitals and nursing homes and the development and implementation of mass vaccination programmes maximising the benefits of vaccine development projects. "Overall, we can identify a "projectification" in the COVID-19 response which is likely to have much wider ramifications across economy and society" (Winch et al., 2021:8).

Whether a "saturation" of projectification in firms, industrial sectors and economies will take place, and at what point this saturation will happen needs to be looked at in future research. These reflections have generated new vocabulary, such as 'overprojectionisation' (Lundin, 2015), 'deprojectionisation' (Lundin, 2012) and 'post-project society' (Lundin, 2015).

5. Conclusion

The economic indicators of the share of project-work in organisations open up an array of possibilities to investigate how best practices in project management can improve the speed, productivity, effectiveness and competitiveness of companies and economies.

Projectification has great means and contains ambivalent aspects for individuals, organisations, societies, social institutions and nations. This analysis shows that there could be several winners in projectification. The winners could be the projectocracy, the executives in the organisations, the organisations as they are gaining more flexibility and competitiveness, the project management associations, the public sector and societies. Finally, national economies could also benefit

greatly from projectification because they are gaining a higher degree of flexibility, innovativeness and wealth, which are important competitive factors in the global competition between individuals and organisations, and also between national economies. The losers of the projectification trend could be the individuals working in unstable employment conditions (the projectariat), and the breakdown of social welfare systems as instability and unpredictability increase . Both sides of the projectification coin need to be reconciled to achieve good conditions for all stakeholders in future project societies.

We suggest that institutions should have a stronger influence to steer and control this transformation that will have a great impact on every member. We also believe that individuals need to be well educated so that they can avoid exploitation. Finally, we would like to point out that project management has been criticised as a masculine capitalist management practice. It is therefore the responsibility of organisations to further develop the discipline so that it becomes a more human-oriented, sustainable management practice, not built upon the exploitation of human and natural resources.

Project management practitioners and researchers all over the world can argue about how important their work is by using evidence. Projects are a driving force of corporate and economic development.

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CHAPTER 2

Projectification and SMEs

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Small and Medium Enterprises (SMEs) are the largest of the categories of business entities: they account for 90% of the out of all types of companies and they are responsible for 70% of wealth and employment generation. Projects are currently key to social and economic development. This reality is not unknown to SMEs, which, however, have so far not had a strong link with project management, which has traditionally focused on large companies, and SMEs have not widely adopted project culture. In this chapter we will analyse the specific features of SMEs, their relationship with projects and the characteristics that influence their management. We will also review the limitations on the competitiveness of SMEs and how they can use projects as a tool for competing in the current business context.

Keywords: Projectification; SME; competitiveness.

1. Introduction

This chapter aims to address the impact of projectification on SMEs. The aim of every organisation is to remain competitive in order to stay alive. Projects represent a way of organising work that ultimately aims to maintain and develop the competitive abilities of.

To do this, it is necessary to understand the relationship between SMEs and projects, and the specific characteristics, strengths and limitations of this relationship. The level of competitiveness of SMEs and the future challenges that face them also need to be understood.

Only from this global perspective will we be able to understand the implications of projectification for SMEs and the opportunities and threats it poses.

Before doing so, it is useful to dedicate a few lines to reflect on the nature of projects and their irruption at both economic and social levels.

1.1. *Why do SMEs carry out projects?*

This is a critical point for understanding the approaches used for writing this chapter.

SMEs, and every type of organisation, launch projects for something specific. That something is known as benefit, and it is related to the expected impact of a project on an organisation. In other words, a project is successful if it achieves the impact expected. This is different from the traditional measurement of success, which focuses on scope, cost and schedule. It is necessary to differentiate between project success and project management success.

For practical purposes, is it better to deliver a well-managed project that does not meet its objectives or a project that deviates from the plan but generates the expected benefit (or exceeds it)? The Sydney Opera House is a clear example of the latter.

To realise successful projects, it is necessary to set strategic objectives for a company (or the business area involved) and assess what the project considered will contribute to these objectives. The issue is that the organisation and running of SMEs tends to be more informal (especially when they are smaller) and this poses a challenge when defining the impacts expected. It is more difficult to assess impacts when the strategic roadmap is not explicit. And SMEs do not usually have strong roadmaps.

The good news is that it works: if project decisions are consistently in line with strategy, there is a significant improvement, 38%, in terms of meeting objectives when compared to decisions that do not match strategy (PMI, 2017).

1.2. *Why are there so many projects?*

One of the most illustrative explanations of the shift from operations to projects is provided by Antonio Nieto-Rodríguez in his article *The Project Economy has arrived* (Nieto-Rodríguez, 2021). According to the author, we have come from industrial approaches or similar, focused on manufacturing, in which productivity and efficiency were paramount. In a reasonably stable context, with controlled planning cycles (annual operational plans with minor revisions) and operations with a permanent character, it could work. However, the current landscape is characterised by a lack of stability caused by frequent change.

In the current context with a high degree of change, with the advance of the service model over the production model, the reduction of product cycles and the drive for digitalisation, among other factors, the ability to adapt comes to the forefront, far ahead of efficiency.

This is where projects come into play. Projects are the only way to embed change in organisations. Projects are temporary endeavours, as opposed to operations. They help organisations to adapt. To evolve.

So it is not surprising that projects are playing an increasingly important role in business models and ways of organising companies of all sizes. Much progress has been made since Midler's identification back in 1995 of the impact of projects on the way Renault operated and it was structured.

2. Aiming accurately: why it makes sense to explore the relationship between smes and projects

The growing role of projects in society and in economic development is such an obvious reality that we are devoting a book to unravelling it.

This chapter focuses on SMEs, so it is worth reviewing the main parameters that are taken into consideration when identifying a company as an SME. To be included in one of the following categories, a company must meet the two requirements shown (the parameter linked to assets on balance sheets has been excluded).

Tabla 1: Parameters for SME status, according to European Commission Recommendation 2003/361/EC

Typology	Number of employees	Annual revenue
Micro enterprise	<10 employees	< €.2 million
Small enterprise	<50 employees	< €10 million
Medium enterprise	<250 employees	< €.50 million

In the case of the United States, higher numbers of employees are usually considered, although the thresholds depend on the activity of the SME (SBA, 2022). For example, traditionally, the upper limit of the number of employees for an SME has been 500 people, compared with 250 in Europe.

2.1. *The economic impact of SMEs and their projects*

The importance of SMEs, both in terms of their contribution to GDP and in terms of employment, is another undeniable fact. According to the World Economic Forum, they account for nearly 90% of companies and almost 70% in terms of the contribution to GDP and employment generation (WEF, 2022).

So, to get the background, let's start by estimating the overall impact of project-based work in small and medium-sized enterprises. For this we will use two complementary sources.

Let's begin with Yvonne-Gabrielle Schoper, author of the previous chapter and one of the pioneers in measuring projectification, who in 2018 estimated the economic contribution of project-based activities in different countries (Schoper et al., 2018). This study has been followed by others that use the same approach (see

Table 1). For guidance purposes, figures from different countries studied would place the contribution of the Project Economy at an average value of 40.6% of GDP. If we extrapolate this to the share of the global economy that is held by SMEs, we obtain a value of 28.4% of the overall GDP generated by project work in small and medium-sized enterprises.

Table 2: Estimation of the level of projectification, as a percentage of GDP in different countries

Country	Autor	Year	%GDP
Germany	Y.-G. Schoper et al., 2018	2019	41.3%
Iceland	Y.-G. Schoper et al., 2018	2019	31.5%
Norway	Y.-G. Schoper et al., 2018	2019	33.8%
China	O. Lixiong et al., 2018	2022	53.0%
South Africa	C. Marnevick, G. Bekker, 2022	2023	43.5%

Let's now turn to the analysis of the results of project-based work in SMEs. Rodney Turner (Turner et al, 2010), states that approximately one third of SME activity is generated by projects. If this value is applied to the contribution of project-based activities in SMEs, it is 23.3% of the overall GDP.

This approximation would indicate that projects in SMEs generate approximately a quarter of global GDP. In terms of economic value, the International Monetary Fund forecast for 2023 is $106.2 trillion of Global GDP (IMF, 2023, current prices). According to this estimate, project-based work carried out by SMEs will account for about $26.5 trillion. For context, this figure is slightly higher than the entire US GDP for the same year.

On the other hand, most of the sources above show that the trend for using projects is increasing by between 1% and 5% per year (O. Lixiong et al., 2018). And these are data that do not reflect the impact of the pandemic and the massive launch of "digital transformations".

The Project Economy has arrived (Nieto-Rodriguez, 2021). It seems important, therefore, to ensure thatSMEs are fluent in the language of projects.

2.2. *Project success (failure) rate*

Typical project success rates show a clear reality: there is much room for improvement in project management.

The Project Management Institute conducts an annual study, called the Pulse of the Profession, in which it collects the main data related to projects.

According to the results for 2021, 73% of projects meet their business objectives, leaving a worrying 27% that do not meet them. 62% are completed on time,

i.e. almost 40% are behind schedule. And 55% stay within their budget, which leaves almost half of the projects with cost overruns. The rate of failed projects (recognised) is 12%.

These results, with slight variations, are consistently repeated. It would be hard to imagine 3 out of 10 buses not arriving at their destinations, 4 out of 10 arriving late and 5 out of 10 asking for money to finish the journey once it has started.. The reasons for these results are varied, and the Pulse of the Profession makes a detailed review whose results do not tend to change substantially from year to year.

To contextualise the situation for SMEs, the region of La Rioja, Spain, publishes a biennial study of the level of development of project management. The figures offered on the success of projects show 75.2% in terms of meeting objectives, 73.8% in terms of deadlines and 73.6% in terms of budget (Government of La Rioja, 2023).

As a contrasting view, Bent Flyvbjerg, an author specialised in large projects, has coined the term, the "iron law of project management": "over budget, over time, under benefits, over and over again" (Flyvbjerg, Gardner, 2023). According to the author, almost half of all projects do not deliver on cost, only 8.5% of projects deliver on cost and schedule and a negligible 0.5% also generate the benefits expected. It is true that Flyvbjerg focuses on large infrastructure projects, but it is striking that in such a projectified environment, the results are so worrying.

Another example, linked to post-pandemic digital transformation efforts, cites an average failure rate of 87.5% (Bonnet, 2022).

Projects fail systematically, we know the causes and yet they continue to fail, why? This is known as the Cobb paradox.

2.3. *What it takes to get projects moving forward*

It can be concluded that, in general, we do not know how to take projects forward. This has a lot to do with skills.

As mentioned in the Introduction, projects must meet certain impact expectations. The management of the projects is also expected to be successful, that is, in line with the planning that has been carried out. That implies a duality in terms of the competences needed to carry projects out. On the one hand, there are competences linked to the strategic phase, the conceptualisation and evaluation of projects, which enables the most suitable projects to be selected. On the other hand, there are competences related to planning and execution.

An article linked to this duality (Leinward, Rotering, 2017) showed the results of a survey given to managers that asked them about their levels of effectiveness in developing strategies and executing them. The study showed that 8% of the respondents defined themselves as very effective in both facets, 23% as effective in both, and 35% as not effective in either of the two areas. By facet, 48% of respondents were ineffective in strategy development and 50% in strategy execution.

This survey was carried out in the corporate environment, which has much higher levels of specialisation than SMEs, in which generalist profiles are more important. Therefore, results in small and medium-sized companies are probably significantly lower.

There are different sources that relate the development of certain skills with better project performance. For example, the Pulse of the Profession, in its 2023 edition, included significant differences between organisations according to the different levels of development of the power skills (which could also be referred to as interpersonal skills) and their influence on aspects linked to projects. Thus, a high level of prioritisation in power skills is related to a significant improvement in both the rate of projects that meet business objectives and in the reduction of budget lost because of failed projects. At a broader level, power skills are also associated with greater maturity in benefits realisation, project management and organisational agility.

And in the case of SMEs, what can we say? Well, the development of skills requires time and resources, which are often the main barrier to progress for small and medium-sized enterprises. We will address this specific aspect later on, which, in my view, is the key element that will condition the ability of SMEs to surf the wave of projectification.

3. SMEs and their projects

In the following section we will try to unravel the relationship between SMEs, their projects and their project management.

The fact is that SMEs have received little attention in project and project management literature, with a few exceptions such as the contributions of Rodney Turner..

3.1. *Traditional project management*

Project management knowledge has been linked to technical disciplines, and it took off in the second half of the 20th century.

Both in terms of their origin and their areas of application, project management methodologies have become more and more sophisticated, requiring increasing levels of specialisation for their application. Perhaps this is the main reason why project management has traditionally been kept at a distance from the general company management: only specialists were able to understand it. As Antonio Nieto-Rodriguez often mentions, tools in business management are usually simple (McCarthy's 4Ps of marketing, Porter's 5 forces etc.), how can we expect project management to become mainstream if the tools are so complex?

This evolution in approaches and methodologies has made it more difficult for SMEs to incorporate projects, as they have very different needs from other types of

companies. Let's start with a global characterisation of SMEs compared with large companies and their level of fit with traditional project management.

Table 3: Characterisation of SMEs and traditional project management according to Ghobadian y Gallear (1997), Turner et al (2009, 2010)

Domain	SMEs vs large companies	Traditional project management
Processes	SMEs require simple planning and control systems, informal evaluation and reporting.	The processes are formal and often bureaucratic
Procedures	SMEs have a low level of standardisation, with idealistic decision making.	The procedures encourage specialisation and formal decision making
Structure	SMEs have a low level of specialisation, with multi-tasking, but a high degree of innovativeness.	Roles are well defined and traditional project management stifles innovation (Keegan, Turner, 2002)
People	Because of the higher frequency of failure in SMEs, people prefer tested techniques	Traditional project management is system focused rather than people focused

The table 3 shows the alignment between traditional project management approaches and the characteristics of large companies. It also shows the mismatch with the reality of SMEs, which results in the limited application of these types of approaches. SMEs require project management approaches that meet their needs.

3.2. *The impact of size on the management of SMEs and their projects*

In the previous section we compared SMEs with large companies. However, the definition of an SME covers very different realities because the operation of a company with 8 employees is very different from that of a company with 224 employees.

The SME literature has identified patterns in the evolution of firms. A common reference is Lewis and Churchill (1983), who identified five stages of firm growth and characterised each of them.

Table 4: Stages in firm evolution. Own elaboration based on Lewis y Churchill (1983)

Stage	Management style	Main concern
Existence	Direct supervision	Obtaining customers and delivering products/services
Survival	Supervised supervision	Generate sufficient revenue to earn an economic return
Success	Functional	Deciding whether to go for growth or for stability and profitability
Take-off	Divisional	How to grow rapidly and how to finance that growth
Resource maturity	Line and staff	Consolidate the gains from rapid growth and maintain the advantages of small size

The key point is to realise that, although they are all SMEs, the challenges at each of their five stages of growth are different, as are the structures and needs, and these aspects influence the management of their projects.

Table 5: Organisational structure, by size. Created by the author,
based on Turner et al (2010)

Size	Business units	Management layers	Nature of work and procedures
Micro	One	One	Multi-task / people focused
Small	Several	Two	Multi-task / people focused
Medium	Several	Three	Specialist / Formal

Thus, if we consider size as a guiding factor, the smaller the company, the more it operates based on informal processes and flexibility, with a predominance of generalist profiles. This is the reality for micro enterprises and also for small enterprises. Medium-sized companies, however, require a more evident level of formalisation, and they usually have specialists who allow them to take advantage of the greater systematisation in project management.

The evolution in the size of the company is dynamic and there are moments of transition that are critical. In his research, Turner (2010) detected a crisis point at around 15-20 employees, characterised by the creation of different business areas. At 40-50 employees, another transition occurs, caused by the incorporation of intermediate management levels, coinciding with the transition from small to

medium-sized companies. Can we pretend that these changes at an organisational level do not affect project management in companies?

Therefore, project management approaches and tools need to take these aspects into account. Tools used for large companies can be adapted for medium-sized companies, which also have a certain degree of formalisation and specialisation. But a further twist is needed to adapt them to small and micro enterprises. Turner defined these approaches as lite for medium-sized enterprises and micro-lite for small and micro enterprises (Turner et al. 2012).

3.3. *Projects in SMEs*

SMEs often use their projects as part of what they offer to other companies, to create products and services, or they also apply them internally, for their own growth and innovation.

As mentioned in the previous section, it is logical to assume that the characteristics of an SME influence the projects it develops in some way. The literature suggests that they do. There is a relationship between the size of the SME and the average size of its projects, expressed in terms of project duration. Thus, the most common duration for projects in micro enterprises is 0 to 3 months, in small enterprises 3 to 6 months and in medium-sized enterprises 6 to 12 months (Turner, 2010).

Generally speaking, the smaller the company, the smaller the projects it develops. And smaller projects mean lower management requirements. On the other hand, we have mentioned that the smaller the company, the higher the level of flexibility in procedures.

Therefore, how projects are managed must be adapted to the reality of each SME. The management of projects, like any other undertaking, is a resource-consuming activity, between 10% and 30% of a total project, according to Turner (2012), so there will be a point that optimises the efficiency of the result. Depending on how complex a project is, it requires a certain degree of effort in management tasks.

In short, the smaller the company, the less effort is needed to obtain an efficient result. In other words, small project management efforts can yield big results in smaller companies.

This is good news. Smaller companies tend to have fewer resources available for their development. If the requirements are lower, resource constraints will be less important.

There is another interpretation: more is not always better. Higher levels of project management maturity, understood as the greater systematisation of project management practices, can have a negative impact on efficiency if the complexity of a project does not justify it.

This point is of particular importance given the aforementioned relationship between capabilities and project performance. We are not looking at absolute thresholds for project delivery, but ones that are relative to the complexity of the projects undertaken. Smaller projects will entail lower levels of complexity. We are talking about having sufficient capacities to carry out certain types of projects, not absolute capacities that allow us to deal with any project.

3.4. *A practical application: the level of development of project management in organisations in La Rioja*

In order to support the messages so far, we will use the results obtained from the study that evaluates project management practices in the organisations in the region of La Rioja (Government of La Rioja, 2023).

The report, which aims to periodically monitor the levels of development of project management in organisations in La Rioja, includes the results of the projects and a set of parameters that make it possible to define a global development index (GDI), by means of a survey of 379 entities.

The results are broken down according to different factors, including organisation size, which is discussed below.

Results: project performance

First of all, project success results are assessed for the three main aspects (project objectives, schedule and budget). The survey is designed with responses on a five-choice Likert scale. The size grouping includes organisations from both the private and public domains.

*Table 6: Project results, according to organisation size
(Government of La Rioja, 2023) and PMI (2021)*

Parameter	1-9 people	10-49 people	50 and more people	PMI, 2021
Objectives	73.3%	74.1%	79.7%	73.0%
Schedule	73.1%	73.0%	76.0%	62.0%
Budget	73.1%	72.5%	76.0%	55.0%

For comparative purposes, the results obtained show slightly higher levels of success than those indicated by the Project Management Institute in terms of meeting targets. In the case of time and budget, a more evident difference is observed. It is important to note, however, the significant difference between company size and project type in the two samples.

Focusing on La Rioja, it can be seen that larger sizes are associated with better results. However, for the purposes of deadlines and budgets, there are no major differences in the results for the smaller sizes.

Results: level of project management development

An index integrating three dimensions, each with its own set of factors, was constructed to assess the level of project management development. The dimensions are detailed below.

Table 7: Assessment of the level of project management development
(Government of La Rioja, 2023)

Dimension	Indicators
Capacity (C): Respondents' perception of their capacity for project management	• C1. Project management. • C2. Organisational capabilities.
Attitude (A): the attitude within the organisation towards project management	• A1. Attitude towards project management. • A2. Attitude towards promotion of project management by administrations.
Implementation (I): the actual implementation of project management in the organisation	• I1. Use of methodologies. • I2. Training. • I3. Organisational structure. • I4. Certifications.

The evaluation for each indicator (Likert scale 1-5) and for the dimensions is shown in the following table.

Table 8: Results of the ratings of the indicators of the level project management development
(Government of La Rioja, 2023)

Indicators	1-9 people	10-49 people	50 and more people
C1. Project management.	2.34	2.43	3.22
C2. Organisational capabilities.	3.72	3.83	4.18
A1. Attitude towards project management.	3.98	3.98	4.39
A2. Attitude towards promotion of project management by administrations.	3.84	3.88	4.28
I1. Use of methodologies.	2.93	2.87	3.58

Indicators	1-9 people	10-49 people	50 and more people
I2. Training.	1.47	1.65	2.37
I3. Organisational structure.	1.49	1.70	2.61
I4. Certifications.	1.09	1.12	1.32

From these values, the results per dimension and the value of the global development index (GDI) are calculated. The calculation methodology can be found in the report referenced.

Table 9: Results of the assessments of the level of development of project management (Government of La Rioja, 2023)

Dimensions	1-9 people	10-49 people	50 and more people
C. Capacity	3.03	3.13	3.70
A. Attitude	3.91	3.93	4.33
I. Implementation	1.74	1.84	2.47
GDI. Global Development Index	2.55	2.62	3.18

The results obtained show a higher value in the maturity levels of larger organisations for all three dimensions studied. These results show a significant proximity between the smaller levels (1 to 9 people and 10 to 49 people), while the results for organisations with 50 people or more show higher values. Thus, the overall result for larger companies is significantly higher.

By dimension, Attitude is the area that received the highest score in all cases. Regardless of size, the companies surveyed show a high predisposition in terms of the impact that project management brings to their organisations.

This is followed by Perceived Capabilities, with slightly lower ratings but similar behaviour.

Finally, the Implementation dimension shows the lowest values but the same pattern of responses. This section, which is more closely linked to the formalisation of management practices and the application of resources, shows more marked differences with respect to larger organisations.

Comments

Data show similar results for micro and small sized organisations (73.3% and 74.1% in terms of meeting objectives), which links to their results in terms of their level of project management capacity, as identified by the GDI (2.55 and 2.62,

respectively). This, similar to Turner's research, shows the alignment of the organizational needs and types of projects performed by micro and small organisations.

For larger organisations, slightly higher levels of success (79.7% in objectives) are related to significantly higher capabilities, with a GDI of 3.18. These results also seem to support the previous statements, which argue for a fit between project demand and the effort required for proper project management.

If the approaches suggested above are followed, there will be an optimum capacity point for the different levels of organisation. This leads us to consider the relationship between capacities and results and to assess the effort needed in order to improve results with an efficient application of resources.

4. The competitiveness of SMEs

Increasing projectification means changes to how SMEs operate; they have to adapt their structures, tools and processes to respond to new challenges.

In order to understand the challenges SMEs face, it is important to look at the past, the present and the future. Especially the future, because how SMEs operate should match the new challenges. This section is about providing some insight into the competitiveness of SMEs and the challenges ahead.

4.1. *How are SMEs competing?*

The fact is that recent performance has not been encouraging. SMEs have to compete in a complex environment. And they need to do better.

European data show that SMEs are steadily losing competitiveness when compared to large companies. This is the view expressed in the 2002 European Court of Auditors report. That report argues that in the period 2011-2018 SMEs in the European Union fared worse than large companies on key indicators. In particular:

—Revenue growth in large companies was 8 times higher (34.7% versus 4.4%), impacting the market share of SMEs.
—The increase in the number of employees in large firms was 5 times higher (24.0% versus 5.0%), reducing the importance of SMEs in the European labour market.
—The increase in value added of large companies was 3 times higher (44.0% versus 14.3%), reducing the importance of SMEs in wealth creation.

These pre-COVID data do not incorporate the unequal impact of the pandemic on SMEs, which had much less room for manoeuvre in coping with this situation, which affected them more severely than large companies.

4.2. *Principles for competing*

The introduction mentioned that projects are carried out for a purpose: the project's purpose is to generate an impact on the organisation, which is aligned with the company's strategy. If SMEs are increasingly incorporating projects, they will need to assess the implications of this on the main aspects that could condition competitiveness.

First, from an external point of view, SMEs have to deal with a global context characterised by a number of trends. Based on the report by the International Labour Organisation (ILO, 2021), the following issues can be highlighted.

—Changes in economic activity: economic growth is shifting to emerging markets, which will attract the attention of large companies moving their decision-making centres to these countries. In addition, populations will be concentrated in cities.

—Technological changes: technology acting as a disruptive element is not a new concept, but its integration into daily life and the speed of its evolution, as well as its scope, scale and impact have made it an accelerating force .

—Demographic changes: the ageing population is a fact in developed countries, and it is also spreading to China and Latin America, affecting generational replacement at a global level. The role and influence of different generations will be variable in different countries.

—Globalisation: trade, information and the movement of capital and people, have led to greater global connectivity. Markets are evolving and will make Asia the main trade centre, with China and India leading the way. The rise of nationalism and populism can also be observed in some areas.

—Environmental impacts: after a linear phase of warming, we are entering a new stage of exponential climate impacts. Climate issues will be at the root of some of the major economic and social ones.

The World Economic Forum report "Future Readiness of SMEs" sets out five principles for action to boost the competitiveness of SMEs, which are summarised below.

—Vision execution: a clear, powerful vision that is communicated throughout an organisation and translated into concrete and measurable actions.

—People as an asset: talent as a strategic asset, developing the attractiveness to compete with its own strengths (an attractive vision, autonomy, development capabilities, etc.).

—Technology as an accelerator: technology is a means to an end. When an SME has the right vision, it can use technology to achieve it.

—Importance of ecosystems: diverse, complementary and active local and global networks allow access to resources when they are needed, enhancing the capabilities of SMEs. Because of their size and resources, SMEs are much more dependent on collaborative networks than large companies.

—Strategic growth: growth is chosen according to each company's objectives and the evolution of the context of the company. It is necessary to decide how to use the resources and means available to remain competitive.

5. Conclusions

I hope by now it has become clear how important it is for SMEs to take project management seriously.

The dubious fit between traditional project management approaches, which are more suitable for large companies, and the needs of SMEs, has not facilitated project management in SMEs. One thing is clear, however: it is the SMEs that are losing out in this situation. SMEs need to carry out their projects successfully.

This means being aware and taking of the need to deal with projects appropriately. If SME's want to be competitive, they need to become responsible in four areas, the areas mentioned below, from 5.1 to 5.4.

However, it is not all bad news for smaller companies: a small effort can lead to big results.

5.1. *Strategic criteria*

SMEs have to decide how they want to compete and define their path.

The choices made will determine how SMEs will structure themselves and how they will face the challenges ahead. These decisions will also determine the attractiveness of SMEs to attract people who will help the company go on. Projects are a tool that will serve to boost decisions based on each company's purpose and conscious intent.

The clarity of the ideas held by people who are leading the changes does not always reach the other levels of an organisation. The "why" is often only clear to the most senior people. Flexibility often leads to the realm of the implicit, when the best tool is explicit communication, especially where purposes and values are concerned. Explicit strategy, which allows objectives, criteria, values and aspirations to be shared, is a perfect way to align behaviours and people.

Once again, we are talking about the need for suitable levels of dedication, which are needed to guide and inspire the advance of the company. We are talking about enough attention to strategy setting, about being solvent.

5.2. *Project criteria*

SMEs need to be project management savvy and choose their own particular approaches. This is the sole responsibility of the SME, having enough knowledge in project management.

There are no excuses. In a Project Economy, the future of every SME depends on the success of its projects. Project management is not the domain of large companies. Nor is it limited to a specific field. It is transversal. It applies to everything and everyone. SMEs must develop their own criteria to consciously select their project management approaches. This involves a clear approach to how each company wants to compete (strategic criteria) and how projects can be helpful in achieving this.

Tools and methodologies that are suitable for SMEs do exist, but more progress is needed.

One of the main demands has to do with the limitation of tools aimed at SMEs. But as mentioned, today there are tools for SMEs. The market for tools and approaches for project management is very dynamic, and alternatives have been developed that can be tailored to the needs of SMEs. PM^2, developed by the European Commission, is an example of an initiative that promotes access to project management and the establishment of a common language at a European level. Since 2018, it has been available in an open access format with guides and documentation in multiple languages,

More recently, other initiatives, such as p3.express, have gone further by simplifying the administrative burden and can be especially useful for low complexity projects.

5.3. *People criteria*

Projects are driven by people. And SMEs, especially the smaller ones, are focused on people.

This focus on people, together with attractive approaches at a business strategy level, along with roots in a territory, can allow SMEs to remain competitive in the race to attract talent from generations with very different life aspirations to those of previous ones. The labour market is evolving and, once again, SMEs have to compete.

Micro and small companies are mainly based on generalist profiles, and these types of workers are not necessarily trained in project management. Versatility and multitasking should not be a handicap to the success of projects. If projects are the tool needed to compete, their implementation must be done in a professional way. Proper levels of training are necessary, as having the correct skills will have a positive impact on project outcomes.

Resource constraints should no longer be an unmanageable problem. It is true that in the past, access to training was somewhat more complex. Today, there are a multitude of useful forms of project training, many of them free of charge. Even large companies such as Microsoft or Google provide useful free online training courses in project management.

In a Project Economy, it does not seem reasonable to limit the future of the company by not having skilled people although they have the opportunity to improve their skills easily (accessible and affordable). Each SME must be responsible for ensuring that its people have appropriate skill levels.

5.4. *Technological criteria*

Technology is key to being competitive and this will only increase. This is true for every sector of society, including project management.

The recent rise of ChatGPT has highlighted the impact of technology. The capacity for disruption in specific areas, such as the automation of monitoring and reporting, will be a permanent feature that will impact aspects such as efficiency.

The ability of SMEs to integrate technological advances will play a key role in their ability to compete. This will require additional effort, given the reduced presence of specialised profiles. SMEs need to be aware of the key role of technology in order to compete and find the right sources of information and collaborators in order not to fall behind. Technological criteria are non-negotiable and must be added to other criteria.

Strategic criteria, project criteria, human criteria and technological criteria. In my opinion, these are the four pillars that will support the future of SMEs in the project economy.

It is good news that projects have transcended the technical field and are now recognised in the business field. Proof of this is the article "Your projects are your future", recently published in the Harvard Business Review (Ignatius, 2021).

So, SMEs, *your projects are your future*.

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CHAPTER 3

Projectification and Development Cooperation

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Abstract

Development Cooperation is a global endeavour that aims to improve the lives of the world population. Projects play a significant role in this endeavour, and they follow an internationally accepted set of objectives, the Sustainable Development Goals, and sufficient elements to track progress in Human Development. Over fifty per cent of global investment in Official Development Assistance is implemented in the form of projects. This is a joint effort in which a multitude of stakeholders participate and interact at all levels, from international agencies to grassroots organizations. Development Cooperation projects take place in different countries, share some common characteristics, and are actually achieving their purpose. Project Management in Development Cooperation makes extensive use of the Logical Framework Approach as a pivotal and almost universal tool for designing, planning, monitoring, and evaluating projects. However, this approach has limitations, and a professionalised Project Management approach could address some of the challenges that project managers face in these projects. This chapter discusses these elements and offers a proposal for some ways to improve project management in these key projects so that building a better world can continue.

Keywords: Project Management; Development Cooperation; Projectification

1. Introduction

It is generally acknowledged that Development Cooperation started at the end of World War II. In 1944, the Breton-Woods Conference laid the foundations for the International Monetary Fund (IMF) and the World Bank (WB), which inaugurated the era of Development Cooperation (Kragelund, 2017). In 1945, the international community developed the United Nations (UN) system that works

to maintain international peace and security, to protect human rights, to deliver humanitarian aid, to promote sustainable development, and to uphold international law. These three institutions, together with the Organisation for Economic Co-operation and Development (OECD), founded in 1961, are the backbone of the multilateral system that provides the global framework for Development Cooperation. In 2000, the adoption of the Millennium Development Goals (UN, 2000) was the first step that led to the creation of the more ambitious 2030 Agenda for Sustainable Development in 2015 (UN, 2015). This agenda was a key milestone as it defined the globally accepted set of 17 Sustainable Development Goals (SDG) that currently define the scope and accountability of Development Cooperation (Fukuda-Parr & McNeill, 2019).

However, over 75 years have passed since its inception, and finding a standard definition for Development Cooperation is still not easy. In fact, many different definitions can be found in academic literature (Chaturvedi et al., 2021) that highlight the complexity of the concept and its associated system. Even without a clear-cut definition, it can be said that Development Cooperation is an endeavour that engages multiple actors in international cross-border activity, focused on improving living standards for the world population, through the development of numerous types and modalities of aid.

What is not contested is that Development Cooperation is a global activity that mobilizes vast amounts of funds and effort. It has been assessed that "*over the past 60 years high-income countries have invested over 4000 billion euros in development aid*" (Develtere et al., 2021). Measured in constant 2020 USD, Official Development Assistance (ODA) more than quadrupled in the period 1960-2020, making Development Cooperation a growth activity. In 2021, ODA reached 178.9 billion USD by the 38 countries that are members of the Development Assistance Committee (DAC), representing 0.33% of their combined Gross National Income (GNI) (OECD, 2021). This is still far from the 0.7% ODA/GNI target agreed on 24 October 1970 by UN Resolution (OECD, 2016).

Development Cooperation has greatly evolved (Janus et al., 2015) as a result of numerous factors, and it is subject to the changing geo-political conditions (Ayllón, 2007). But from the very beginning, Development Cooperation has extensively used the project approach to implement its actions. This chapter will discuss the role of projects in Development Cooperation, their importance, and the way they are managed to contribute to shaping a better world.

2. THE ROLE OF PROJECTS IN DEVELOPMENT COOPERATION

Projects have been implemented throughout human history, from Stonehenge to the exploration of space. It was in the second half of the 20th century that projects started to be managed by applying systematic tools and techniques (Seymour

& Hussein, 2014). The Development Cooperation system was born at almost the same time as project management started to be considered as a professional field on its own merit. Projects have been a fundamental instrument for delivering Development Cooperation from the very beginning, and Development Cooperation projects can be considered as part of the "human condition" that defines the current "project society" (Jensen et al., 2016).

2.1. *Defining Development Cooperation*

The official source of data regarding global figures on Development Cooperation is the OCDE´s DAC , which keeps annual records of the information provided by its members in its Creditor Report System (CRS) Aid Activity database. There are strict directives, rules, and principles on how ODA is reported. These include agreed-upon definitions for aid channels, type of aid, purpose, policy objectives, and tying status.

Not everything is considered as ODA by the DAC, for example, military aid and activities for the promotion of the security interests of the donors are not considered to be ODA (Price, 2019). There are certain forms of aid, such as humanitarian aid, food aid, and in-donor aid to refugees, that are accounted for in different ways. This is due to the very specific context in which these types of aid are provided, which means that they do not follow the core criteria that the DAC establishes for international assistance to be recognised as Development Cooperation: assistance needs to be provided to developing countries, it must go towardseconomic development or the improvement of living standards, and it must be in the form of grants or concessional loans (Klingebiel, 2014).

Table 1 shows the eight defined types of aid reported in the CRS database (DAC, 2018). The purpose of the database is to offer a set of readily available data that enables analysis to be carried out on where aid goes, what purposes it serves, and what policies it aims to implement. This needs to be done on a comparable basis for all DAC members. Tracking ODA is essential for informed decision making and for ensuring that aid efforts (including, of course, projects) are allocated correctly.

Table 1: Aid types - description (adapted from DAC, 2018)

Aid types	Description
Budget support	The donor transfers funds directly into the recipient country´s budget and renounces to the exclusive control of the funds, sharing the responsibility with the recipient country.
Bilateral core contributions and pooled programmes and funds	The donor transfers funds to another stakeholder and renounces to the exclusive control of the funds by sharing the responsibility with such other stakeholder - other donors, NGOs, multilateral institutions, etc.
Project-type interventions	The donor funds or implements projects directly. These include investment projects and other interventions, including feasibility studies, appraisals, evaluations, aid channelled through NGO or multilateral institutions, capacity building, etc.
Experts and other technical assistance	Provision, outside projects, of know-how in the form of personnel, training, and research.
Scholarships and student costs in donor countries	Financial aid awards, contributions, and costs borne indirectly for individual students and trainees from aid recipient countries.
Debt relief	Groups all actions relating to debt – forgiveness, conversions, swaps, buy-backs, rescheduling, refinancing
Administrative costs not included elsewhere	Administrative costs of development assistance programmes not already included under other ODA items as an integral part of the costs of delivering or implementing the aid provided.
Other in-donor expenditures	Groups a number of contributions that do not give rise to a cross-border flow

Note that "project-type interventions" is one of these eight defined types of ODA, highlighting the importance of projects in the system.

2.2. *Defining Development Cooperation projects*

Further to the inclusion of projects as a reporting category ("Project-type interventions"), the DAC provides a clear-cut definition of the term project as part of the reporting rules of the CRS and requirements of the CRS database. Table 2 below shows this definition together with those provided by the leading international actors in the field of professional Project Management.

Table 2: Definitions of Project (emphasis added))

Source	Definition
Development Assistance Committee (DAC, 2018)	"A project is a set of inputs, activities and outputs, agreed with the partner country, to reach specific objectives/outcomes within a defined time frame, with a defined budget and a defined geographical area. Projects can vary significantly in terms of objectives, complexity, amounts involved and duration".
International Standard Organization - ISO 21500 (ISO, 2012)	"A project consists of a unique set of processes consisting of coordinated and controlled activities with start and end dates, performed to achieve project objectives. Achievement of the project objectives requires the provision of deliverables conforming to specific requirements. A project may be subject to multiple constraints […]. Although many projects may be similar, each project is unique".
Project Management Institute Lexicon (PMI, 2017)	"A temporary endeavour undertaken to create a unique product, service, or result".
PRINCE2 Glossary (Axelos, 2017)	"A temporary organization that is created for the purpose of delivering one or more business products according to an agreed business case".
International Project Management Association (IPMA, 2015)	"A project is defined as a unique, temporary, multi-disciplinary and organised endeavour to realise agreed deliverables within predefined requirements and constraints. Achievement of the project objective requires these deliverables to conform to specific requirements […]".
PM² - Project Management Methodology (EC, 2018)	"A project is a temporary organisational structure set up to create a unique product or service (output) within certain constraints such as time, cost, and quality. […] A successful project ends when its objectives have been achieved […]".

The DAC definition of project is aligned with the other definitions provided by Project Management organizations that shape the globally recognised best practices in this field. All project definitions include the terms "products" or "deliverables" as a means to achieving "objectives" or "results". This is of paramount importance in Development Cooperation projects as they are, very frequently, sponsored or funded by the public administration (Ika & Hodgson, 2014), and Development Cooperation projects are perceived as "*a way of clearly defining and managing investments and change processes*" (EC, 2004). Investments in Development Cooperation projects are

chosen based on the change they will generate (achievement of objectives) and not on the outputs or deliverables that they will produce.

One element that differentiates the definition proposed by the DAC from the others is the inclusion of the "defined geographical area" as part of the defining terms. This means that the population associated with each territory will be included in the process. Development Cooperation projects are considered to be investments that achieve objectives that bring about (positive) change to the people they impact. Some development agencies acknowledge these elements in their own definitions of project. For example, the Spanish Agency for International Development Cooperation states that: "A Project is an autonomous set of investments, political activities and institutional or other measures, designed to achieve a specific development objective in a certain timeframe, in a certain geographical region and for a certain target group, that will continue to generate goods and/or services after the external support is withdrawn, and which effects last once the implementation is concluded" (AECID, 2001).

This link between a project, a territory, and its target population is key to adequately characterizing the context (physical, socio-economic, cultural, etc.) and the relationships between the actual stakeholders that will allow the necessary actions for change to be identified and designed. Moreover, the above definition expressly incorporates a key issue into Development Cooperation projects: the sustainability of deliverables and the effects they trigger once a project ends. In other project environments, this element is not mentioned because it is assumed that a project must contribute to generating the benefits expected by the promotor of the project, who is logically fully involved in the project, contributing to its success. However, the "ownership paradox" in Development Cooperation projects means that the end owners of deliverables and the beneficiaries of project results, the target population, are generally not the project promotors nor the funding providers (Moya-Colorado, León-Bolaños & Yagüe-Blanco, 2021). Yet, they are key to the sustainability of a project as they are linked to the territory and will stay in it while the promotor and the donor do not have such a strong connection.

2.3. *The purpose of Development Cooperation projects*

The objectives of Development Cooperation are very wide-ranging, and cover, essentially, every field of human activity. The establishment of shared objectives in Development Cooperation has been debated and has evolved over the decades. In the early days of Development Cooperation, the objectives and metrics used were essentially linked to economic activity and growth, such as Gross National Income (GNI) per capita. But, in 1990, the UN developed a new approach that addressed and measured human wellbeing by focusing on people and their potential, opportunities, and choices: the human development approach.

Using this approach, the Human Development Index (HDI) was developed, incorporating other elements linked to health (such as life expectancy at birth) and education (expected years of schooling), to the previously used economic indicators. However, the HDI captures only part of what human development means. It does not reflect inequalities, poverty, human security, empowerment, etc. So, in 2010, the Multidimensional Poverty Index (MPI) included additional indicators to measure standards of living that were not present in the HDI, such as access to drinking water, sanitation, electricity, cooking fuel, and assets. These two indexes are now used as the standard measurements of a population´s wellbeing, and reports with data for each country are regularly published.

In 2015, another approach to deal with the complexity of Development Cooperation issues was introduced when the 2030 Agenda for Sustainable Development was adopted. Building on the previous Millennium Development Goals (UN, 2000), the definition and acceptance of 17 Sustainable Development Goals (SDG), 169 targets, and 231 indicators provides a comprehensive framework of all the dimensions that affect human wellbeing (table 3). This new objective framework not only incorporates elements that are key to human wellbeing (such as peace, justice, and strong institutions – SDG16), but also other elements that are key to the sustainability of the planet and are inherently linked to it (such as climate action – SDG 13).

Table 3: The Sustainable Development Goals (SDG)

1. No poverty	10. Reduced inequalities
2. Zero hunger	11. Sustainable cities and communities
3. Good health and well being	12. Responsible consumption and production
4. Quality education	13. Climate action
5. Gender equality	14. Life below water
6. Clean water and sanitation	15. Life on land
7. Affordable and clean energy	16. Peace, justice, and strong institutions
8. Decent work and economic growth	17. Partnership for the goals
9. Industry, innovation, and infrastructure	

The SDGs are closely interconnected in an intricate network that highlights the complexity and multi-dimensional issues that are addressed by Development Cooperation projects. The resolution of, or advancement in, one objective is almost impossible without the confluence of advancements or resolutions in others. From the perspective of project management, it is possible to identify the SDGs with portfolios, targets with programmes and projects that are aligned with indicators. Every Development Cooperation project should work in alignment with these objectives, targets, and indicators as part of a system whose objective is development for the world population.

2.4. *The importance of projects in Development Cooperation*

According to the data available development Cooperation is mainly implemented in the form of projects. Figure 1, below, shows the percentage of ODA that has been delivered in the form of "project-type interventions" over the last 10 years, according to the CRS database of the DAC. The percentage is consistently over 50% (averaging 51,8% in the series shown), with the other 7 aid types sharing the remaining percentage.

Figure 1: Distribution of ODA by type in DAC countries
(in Million USD 2020) Source DAC 2021
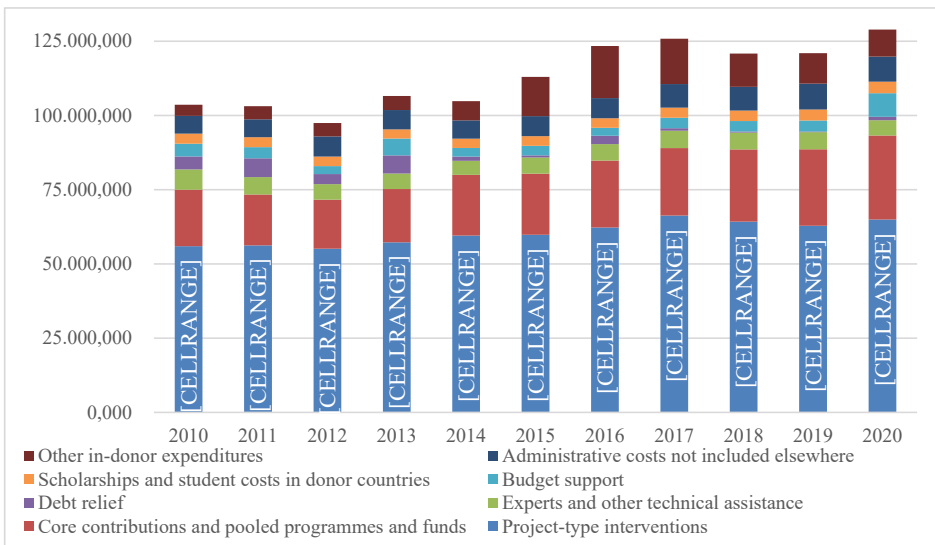
Note that part of the assistance provided under "core contributions and pooled programmes and funds" can also be implemented in the form of projects. In this case, the main difference affects the control and audit mechanisms that the donors have over the funds. Similarly, assistance reported as "experts and other technical assistance" can also be delivered by using projects that focus on capacity building (training, coaching, studies, etc.) as their core activity. So, besides the percentage of aid that is expressly reported as "project-type interventions", there is an additional share of aid that is also implemented in the form of projects, raising the overall percentage way beyond the 51,8% stated here. Overall, projects are undoubtedly the most important instrument of Development Cooperation.

2.5. *Stakeholders in Development Cooperation projects*

We have seen that Development Cooperation projects are clearly defined, and that this definition includes the achievement of agreed objectives and the fact that projects have a positive impact on territories and their associated populations. Similarly to the multidimensionality of human development, the multiple networks of important stakeholders engaging in Development Cooperation activities include almost every form of social organisation: international institutions, national and local governments, private companies, and civil society organisations.

As has been clearly stated: "*Development Cooperation is a maze*" (Develtere et al., 2021). All the nodes of the network must ultimately work for the benefit of an extremely diverse final target population. This diversity is expressed at numerous levels, including political, social, cultural, and religious ones. As with the scope of projects, the stakeholder network in Development Cooperation projects is wide, deep, and complex. How all the stakeholders involved in a project interact with each other and contribute to the project is a factor that is critical for project success.

The UN system alone is comprised of 80 different organs, funds, agencies, commissions, bodies, departments, and offices (UN, 2021). The current 38 OECD members usually have their own bilateral development agencies at a national level, but there is also a wide network of decentralised cooperation, in which local governments (i.e., municipalities) also engage in Development Cooperation activities (Bontenbal & van Lindert, 2009). There are countless Non-Governmental Organisations (NGOs) ranging from international organisations such as the Red Cross to local grass-roots organisations that also take part in Development Cooperation activities. Geographically, Development Cooperation engages countries across all the continents in north-south, and south-south cooperation, and plays a role in shaping international policy.

The role of civil society at a grassroots level also needs to be considered. Local NGOs play a pivotal role in two different but complementary functions. Firstly, they engage well with target populations, as they can understand each context (socio-economic, cultural, religious, etc.) from the inside, and they can act as fundamental partners for all the external organisations participating in Development Cooperation projects. Secondly, they can also act as advocates towards the local authorities, and they can demand accountability from all actors on behalf of the target populations, promoting project sustainability from within. The role of civil society is key for the promotion of democracy, the rule of law, social justice, and human rights in unstable contexts. Therefore, capacity building components must be included in Development Cooperation projects to reinforce these two key functions.

2.6. *Characterisation of Development Cooperation projects*[1]

Development Cooperation projects have been studied and characterised from several perspectives. Golini & Landoni (2014), undertook a review of the available literature available in which they systematised the characteristics of Development Cooperation projects. According to their study, Development Cooperation projects have some common characteristics, which are usually present at the same time and influence how these projects are managed. Boakye & Liu (2016) identified different causes of project failure, noting that most of these causes, if not all, have been repeatedly mentioned in the PM literature. Hermano et al. (2013) identified and systematised Critical Success Factors (CSF) for Development cooperation projects and selected seven of these factors, acknowledging their multiplicity and the lack of consensus on them. Table 4 summarises these findings.

Table 4: characteristics of Development Cooperation projects

Identified characteristics (Golini and Landoni, 2014)	Identified causes of failure (Boakye & Liu, 2016)	Identified CSF (Hermano et al., 2013)
Lack of a defined and/or powerful client High number of stakeholders Difficult, complex and risky environments Resource scarcity Difficulty in using PM techniques in the context of other cultures Presence of intangible outputs, which can be difficult to define and measure	Poor project planning Weak supervision Low commitment by host government Poor management Lack of flexibility Poor Quality-at-Entry (QAE) Optimism bias Project understaffing Exogenous factors Non-performing contractors Delays in project start-up Not admitting failure Project complexity	Team building Local environment Implementation approach Learning opportunities Policy characteristics Availability of resources Stakeholders/beneficiaries satisfaction

Additionally, Development Cooperation projects are enormously diverse, as they are in any other area. In this case, diversity comes from multiple dimensions. We have already seen the variability of the sectors linked to the SDG. The amount of investment is another element of diversity, with projects ranging from

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1. This section is based on the communication presented at the 23rd International Congress on Project Management and Engineering, Málaga, 10th – 12th July 2019. 06-003. (Moya-Colorado & Yagüe Blanco, 2019). "Exploring the adequacy of openPM² to European Union – funded international development grant projects implemented by Civil Society Organizations".

micro-interventions focusing on small regions with restricted target populations, to nationwide projects encompassing the populations of whole countries. Stakeholder networks can also be very diverse, ranging from projects implemented with a limited number of actors to projects that engage with representatives from all possible levels, from international cooperation agencies, national and local authorities, international and local NGOs, and representatives of local communities.

In terms of timeframe, Development Cooperation projects also vary considerably. They range from small projects with restricted scopes and limited financial resources that last a few months to larger projects with wider scopes and budget allocations that can last for several years. Large projects may be replicated or expanded over successive phases or may be grouped into programmes when different components with shared objectives and resources are involved. Due to the strong nature of public investments in Development Cooperation projects, it is possible that the decision-making processes required for the allocation of investments are linked to political cycles in donor countries.

3. Project Management in Development Cooperation

Project Management has been recognised as an autonomous discipline for a long time (Weaver, 2007). There are numerous tools, techniques, approaches, methodologies, and standards that provide orientation and guidance in the identification, design, formulation, planning, implementation, monitoring, and evaluation of projects. Project Management has evolved in parallel to the Development Cooperation system and has provided specific tools and approaches for Development Cooperation projects. Yet the influence of the project management discipline on Development Cooperation projects has not been as influential as in other sectors or areas of activity.

Logical models are at the core of the project approach in Development Cooperation (Ferrero & Zepeda, 2014). The Logical Framework Approach (LFA) was initially conceptualized in the late 1960´s to be used by the United States Agency for International Development (USAID) as a planning matrix for project design and evaluation (Sartorius, 1996). It was later improved by including processes for the design and planning of projects, integrating a results-based approach (Bakewell & Garbutt, 2005; Vázquez et al., 2014). Later on, the approach was integrated into Project Cycle Management (PCM) to include a specific way of planning managing, monitoring, and evaluating Development Cooperation projects (Vázquez et al., 2014).

### 3.1. *The Logical Framework Approach and Project Cycle Management*

It is widely accepted that the LFA is the de-facto standard tool for project management in Development Cooperation projects (Landoni & Corti,, 2011;

Ringhofer & Kohlweg, 2019). The LFA is a participatory analytical process that supports the designing, planning, and management of projects. It follows a number of linear steps and uses defined tools to create a deep understanding of the elements involved in a project. The key elements in the process are:

- Stakeholder participation in the process is an essential element of the LFA as it ensures engagement, ownership, and sustainability. The process usually involves a series of workshops or consultation meetings where all the different points of view held by stakeholders are included, processed, and analysed. This participatory dynamic is the main information input in project identification.
- The identification of cause-effect links in the identified problems so that the root causes can be acted on and effective solutions can be provided. This process aims to set an objective and take meaningful, solving the roots of problems rather than the visible effects or symptoms. As previously mentioned, Development Cooperation projects focus on the achievement of objectives and not on the production of outputs or deliverables.

The LFA is usually structured in 3 phases: analysis, design, and planning, and each of these has several steps and generates specific outputs. Figure 2 provides a diagram indicating the logical sequence of the process.

Figure 2: Diagram of the LFA phases, steps, and its specific outputs
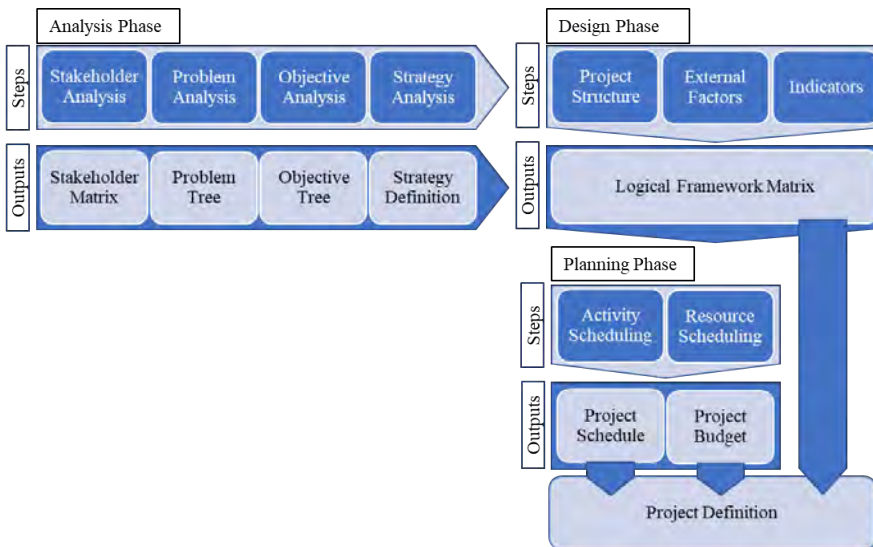
It is of utmost importance to differentiate the LFA as an analytical process from the Logical Framework Matrix (LFM), which is the documented output of the analytical process (EC, 2004). The LFM is based on the information provided by the previous analysis and outputs of the process, and it incorporates further analysis of project structure (validity of the internal cause-effect logic, external factors affecting the project, indicators, and objectively verifiable sources of information). The LFM then provides the necessary information on the activities and resources needed to achieve the established objectives, as well as information required to set up a project schedule and a project budget.

However, the opposite is often true, and the LFA is frequently identified with the LFM. The LFM provides a standardised format (Couillard, Garon & Riznic ,2009) that summarises key project elements, such as the objectives, the scope, and the activities, as well as success factors, risks, and indicators. The outputs of the LFA, namely the LFM, together with the schedule and the budget, ultimately provide a definition of the elements of the Iron Triangle, which provides the scope, timeframe, and costs for a project. The Iron Triangle is a widely known schematic for project management that dates back to the 1950s (Atkinson, 1999) and it is now considered to be outdated: "research has increasingly started to suggest that although the Iron Triangle is important, it does not tell the whole story of project success" (Monje, 2018).

The LFM has evolved, and it can take different forms, but it is basically a 4x4 matrix that includes a description of the logical chain that links activities to objectives, how to measure the achievements, and the external factors that influence the project and that are required to fulfil the achievements. Figure 3 offers a representation of a sample LFM:

Figure 3: Diagram of the LFM

Logical chain	Description	Indicators	Sources of verification	External factors
Objective				
Outcome				
Output				
Activities				

The three documents mentioned the LFM, the project schedule, and the budget, are frequently required by Development Cooperation donors. Together, they provide a project definition that allows projects to be compared and assessed

harmoniously so that funding decisions can be made. In fact, there is a direct link between the LFM and the monitoring and evaluation of Development Cooperation projects. The availability and use of indicators is key in the management of projects. (Montero et al., 2015), and the LFM provides indicators for measuring the achievement of objectives. But, more importantly, there is a direct link between the elements of the LFM and the most commonly used criteria in project assessment and evaluation, namely: relevance, efficiency, effectiveness, impact, and sustainability. These are shown in figure 4.

Figure 4: Links between the LFM and evaluation criteria (IUDC, 1997)
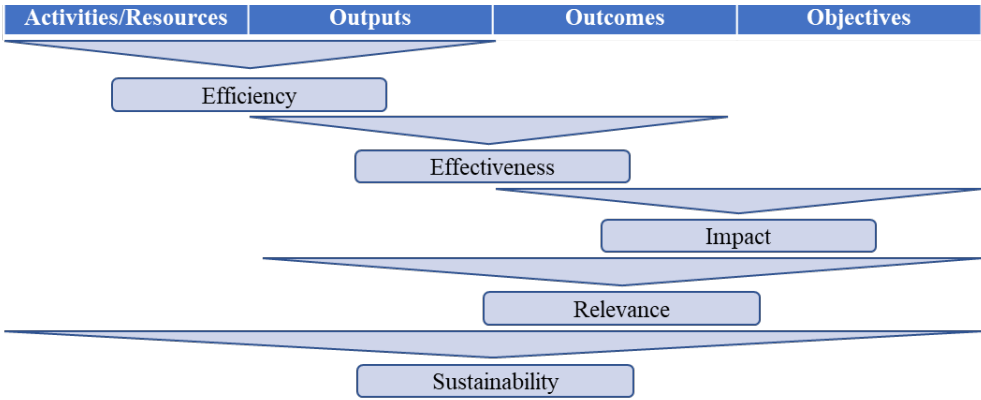
Properly undertaking the LFA process as has been described, in a participatory manner by analysing stakeholders, problems, objectives and strategy, requires considerable time, cost, and effort. This process not always followed, and weak project design associated with the difficulties of involving local beneficiaries and their needs being treated without sensitivity have been identified as one of the causes for failure in Development Cooperation projects (Ika, 2012).

Project Cycle Management appears to provide a wider working framework for Development Cooperation projects that need to be part of a donor´s policy. In essence, Project Cycle Management is a circular sequence of phases that cover three main principles: provision of decision-making criteria and procedures at each phase; progressivity in terms of the prior completion of one phase before advancing to the next one; and recurrent feedback from one cycle to the next by using monitoring and evaluation as a structured process for capturing lessons learned. The five classic phases in the PCM are: 1) Programming, 2) Identification, 3) Formulation, 4) Implementation, and 5) Evaluation and auditing, which feed into the next programming phase. PCM aims to ensure that the project is aligned with the priorities of all stakeholders, that it is relevant for the agreed strategies,

feasibility, and sustainability. To achieve these objectives, PCM uses and integrates the LFM as part of the analytical process needed (EC, 2004).

3.2. *Limitations of the LFA*

Logical models, such as the LFA, are based on identified hypothetical cause-effect relationships that aim to explain how project activities will yield planned deliverables that will contribute to the achievement of intended results and long-term impacts (Ferrero & Zepeda, 2014). The limitations of these models are the implicit isolation of the identified hypothetical cause-effect links and treating projects as closed, controlled, and immutable systems in which the "process elements" are ignored (Mosse et al., 1998). In the case of Development Cooperation projects, ignoring these elements may mean not achieving the main objective of an intervention: the human development process and its sustainability, which strongly depend on the links between the development processes generated and the stakeholders involved (Yagüe et al., 2013). The result is a rigidity that is also derived from approaches that have been adopted from the fields of engineering, construction, and economics., These approaches are dominated by assumptions that include strict rationality, objectivity, reductionism, and expectations of universal validity (Ika & Hodgson, 2014), but they might not consider the specificities of each context, its complexity, and its changing nature.

The LFA should bring these specificities together as part of its participatory dimension, but its practical application often derives in the concentration of efforts to define an LFM that will be acceptable to the donor, as this is often a prerequisite for funding projects that the major donor agencies require (Rodríguez-Rivero et al., 2021). Donors use log frame matrixes as normalised instruments for the assessment of proposals and as a tool for project monitoring and evaluation, but the importance of the participatory process that needs to be activated to ensure adequate engagement and further sustainability is often minimised or ignored. This can lead to further problems in terms of governance, which is understood as being the co-responsibility in decision making for the resolution of collective problems and the achievement of the common good (Aguilar, 2013; Fontana & Yagüe, 2012). Development Cooperation projects need clear governance models that assign roles and responsibilities within a project and for the achievements of a project in terms of decision making, efficiency, and accountability. Mechanisms should be put in place to ensure that both the target population and project stakeholders participate.

In spite of being widely accepted, when assessed, the LFA has been found to have other limitations. The LFM itself has been found to be an inefficient and limited framework for Development Cooperation Project Management (Hermano et al., 2013). The project management capacity of the LFM is not large enough, especially during project implementation, even when it is combined with a project schedule

and a project budget. While it does provide a strong project rationale, project definition, and a monitoring mechanism, there are certain areas of project management into which the LFA does not provide any insight. The LFA does not contemplate a governance model that assigns roles and responsibilities within a project, and it does not consider the achievements of a project in terms of decision making, efficiency, and accountability. All of these issues, together with the rigidity of the LFM once it is approved, and its limited adaptability to changing conditions have been identified as serious limitations of the LFM (Couillard, Garon & Riznic 2009).

There are other project management areas where the LFA is also extremely limited, such as risk management. In this case external factors (which are often called "assumptions") are at times identified as risks when in reality they should be considered success factors. The external factors that are included in the LFM are rarely managed (Yamaswari et al., 2016). Development Cooperation projects are implemented in contexts that are often unstable and in environments that are changeable, and this means that risk needs to be managed in a better way than it is in the LFA. Rodriguez Rivero et al. (2021) assessed several proposals for improving the LFA and concluded that it is necessary to integrate the management of risks, costs, impact, and the time dimensions into the LFA. Similarly, the LFA does not provide guidance on the management of quality, requirements, issues, changes, communications, or team coordination (Moya-Colorado, León-Bolaños & Yagüe-Blanco, 2021).

3.3. *Project governance in Development Cooperation projects*

Generally speaking, Development Cooperation is dominated by donor-recipient schemes. This has changed in recent years with the incorporation of new donor countries and major private philanthropic actors being incorporated into the system. However, there is always a flow of funds involved or a mechanism by which one supports another, which establishes a two-sided relationship at the core of all Development Cooperation initiatives. This seriously affects the way projects are managed. Even if both parties agree on objectives, budget allocation, scope, procedures, ownership, etc., there are many elements that can cause friction in terms of roles, responsibilities, decision-making, and accountability mechanisms along the chain that links policies, strategies, and objectives with the activities on the ground that ultimately affect the target populations in Development Cooperation projects.

Therefore, it is necessary to refer to the element that links the SDG with the target population and the institutions that work for their benefit, which is the Human Rights framework. In 2003, the UN agencies agreed on a common understanding on a Human Rights-Based Approach (HRBA) to Development Cooperation (UN, 2003). The HRBA is a conceptual framework based on human

rights standards which aims to achieve human development by promoting and protecting human rights.

The HRBA aligns all the policies, strategies, plans, and projects in Development Cooperation with the rights and subsequent obligations established by international law. It isa paradigm shift: from needs to rights and from solidarity to legal obligations. The HRBA is rooted in human rights principles (universality, indivisibility, equality and non-discrimination, participation, and accountability) and in the importance of developing the capacities of both 'duty-bearers' to meet their obligations by using accountability mechanisms, and 'rights-holders' to demand recognition of their rights through participation in decision-making processes. Figure 5 is a schematic view of these interactions between these two parties. Both international and local NGOs play a decisive role in the interaction between duty-bearers and rights-holders at all levels, including donors and local authorities.

Figure 5: Human Rights-Based Approach. Adapted from
(Finnish Committee for UNICEF, 2015)
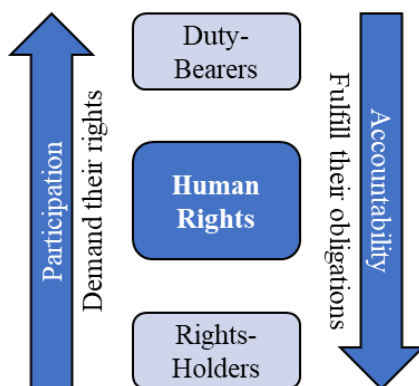
The SDGs as globally agreed objectives are based on and closely linked to human rights. "*Over 90 percent of the goals and targets of the SDGs correspond to human rights obligations. As Member States make progress on the SDGs, they make progress on their human rights obligations – they are two sides of the same coin.*" (Rattray, 2019). With this vision, the HRBA should override the donor-recipient dynamic and drive the governance of Development Cooperation projects.

3.4. *Challenges for Project Managers of Development Cooperation projects*

In addition to the previously mentioned limitations shown by the de-facto standard tool for project management in Development Cooperation, it must also be noted that there is a lack of professional project managers in the contexts in which

Development Cooperation projects are implemented. "Most of the International Development professionals are "accidental" project managers, as they hold project and program management responsibilities yet lack any formal project management education and background". (Ika, 2012). Generally speaking, "the developing world is characterised by poor Project Management capacity" (Boakye & Liu, 2016).

However, there is general agreement on the importance of incorporating improved Project Management practices to improve project success. Project managers working with Development Cooperation projects can benefit from greater exposure to internationally recognised good practices developed in the project management field and applied to other types of projects. Adapting and integrating some of these good practices to the specific realities, needs, and constraints that they face in their projects would be a welcome step.

In the past, several international aid agencies developed their own standards and supported training and education in these areas in developing countries (Golini, Kalchschmidt & Landoni, 2014). In the case of projects implemented by Non-Governmental Organisations (NGOs), specific guidelines have been developed by PM4NGO to integrate the LFA with other Project Management practices included in the Project Management Body of Knowledge - PMBOK® (Hermano et al., 2013). Golini, Kalchschmidt and Landoni (2014) studied NGO project managers who had evaluated the adoption of PM tools and methods. Their work reveals that *"in NGOs, some PM tools are frequently adopted (e.g. logical framework, progress report), whereas others appear to be neglected (e.g. critical path method, issue log, earned value management system)"*. Typically, NGOs are more likely to adopt simple techniques than to focus on more structured and analytical methodologies. According to the conclusions, there is "*evidence on the adoption and impact of PM tools on project performance in NGOs*". Nevertheless, there is an ongoing debate regarding the need to foster a new international standard for Development Cooperation projects (Landoni & Corti, 2011).

This problematic issue in Development Cooperation projects has existed for a long time. It could also be linked to high staff turnover caused by the working conditions in these projects, which are often harsh. However, the professionalisation of project management has spread further in other fields where projects are of paramount importance, such as engineering, construction, and IT development. Nowadays, Project Managers face greater challenges linked to greater complexity, where greater stakeholder participation and flexibility are becoming important success factors. Agile methodologies are emerging and being combined with classic predictive methodologies (such as the LFA), transforming them into hybrid methodologies. This is changing how many projects are understood, and these new methodologies could very well offer interesting tools and solutions for managing Development Cooperation projects.

Nevertheless, there is an obvious need to overcome the limitations of the LFA and its position as a universal solution for summarising a project and driving its management. The adoption of comprehensive project management methodologies could be a positive step, or, at the very least, tools, techniques and best practices that are globally accepted in the field of project management should be properly combined to complement the LFA. This would provide a more holistic approach and a more comprehensive approach to all the key elements and success factors in a Development Cooperation project. The development of a standardised canvas that would reflect these factors, as suggested by Nieto-Rodriguez (2021), could be a major improvement.

3.5. *The contribution of Development Cooperation projects*

Despite the open debate on the effectiveness of aid, which has been discussed on a global level at different High Level Forums on Aid Effectiveness (Rome in 2003, Paris in 2005, Accra in 2008, Busan in 2011, and Mexico in 2014), and on the role of aid in general terms, the world is better today than it was 75 years ago if we consider changes comprehensively. In terms of Global Human Development, the general trend shows that the world has advanced enormously in only the last 30 years, since HDI started to be used (Figure 6). Other indicators, which have been around longer, show similar levels of advancement. In 1950, global life expectancy at birth was 45.7 years, whereas in 2019 it was 72.6 years. Niger appears second to last on the HDI in the 2021 report, and yet the statistics show that mortality for children under 5 child has dropped to 753 deaths for every1,000 live births, from 320 in 1970 (Gapminder, 2022).

Inequalities continue to exist, and there is a large divide between countries with high human development and the least developed countries, with low human development, but the wellbeing of the world population has undoubtedly improved (Prados de la Escosura, 2018). Hans Rosling clearly demonstrates in his book "Factfulness" (Rosling, 2018)that people have a number of biases that make it extremely difficult for them to acknowledge the facts that show that the world is evolving in the right direction.

Figure 6: Evolution of the World Global Human Development Index 1990-220 (UN, 2021)
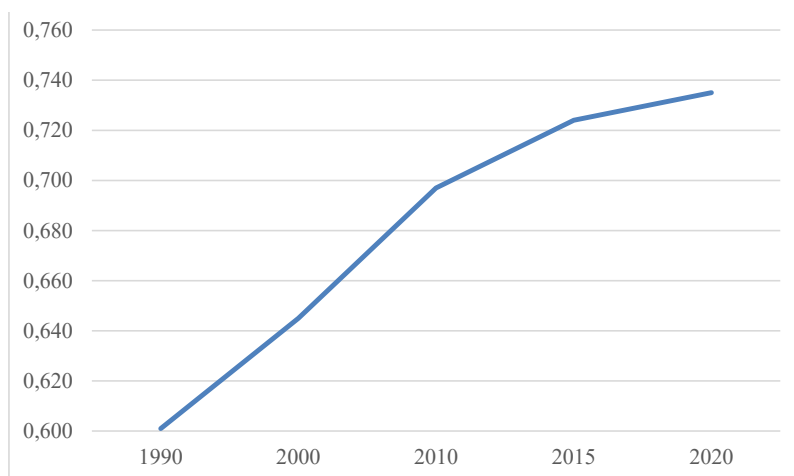
Projects and programmes play a fundamental role in the complex Development Cooperation system as they are the primary ODA mechanism, but not the only one. They deliver work throughout the world, based on shared objectives, in a multitude of sectors, and connect an intricate network of stakeholders. They are a key element in shaping the world. A better world.

4. The way forward for Development Cooperation projects

At the time this chapter was being written, the population of the world reached 8,000 million people. This was announced on the news, and, for a few days, it was a topic for discussion and concern. Whether the world could sustain such an enormous population was questioned and there were even those who connected this figure to a general pessimistic perception about how the world is currently under pressure from other events, such as the COVID-19 pandemic, the climate change emergency, the war in Ukraine, and the global political polarisation.

However, as we have already shown, in general the world is improving. Nevertheless, the work needed for this improvement to continue is, far from over, and there are many areas in which Development Cooperation projects can still improve in order to increase their contribution to these positive trends. We will outline some of the areas in which improvements could be introduced.

Taking the 2030 Agenda for Sustainable Development as an agreed -upon working framework for project objectives, the need for an increase in the alignment of Development Cooperation projects with SDGs should be highlighted. This should include using the goals, targets, and indicators as common elements

when defining, designing, planning, monitoring, and evaluating projects. The consistent use of SDG indicators when applying the LFA could make projects more consistent and comparable, which could lead to increased efficiency and learning opportunities. Integrating the PPP approach (Portfolio – Programme – Project) into the logical sequencing that the LFA/PCM and the SDG share in terms of strategic alignment could be another feasible step. There is global agreement on these goals, targets, and indicators so they could be used and integrated into every project, They could also be part of the logical chain, ranging from overarching policy to tasks implemented in the field. The implementation of these goals, targets and indicators as key elements for the definition of scope could benefit all aspects of project management.

Project governance in Development Cooperation needs to clarify the "ownership paradox" that stems from the wide range of interests and priorities held by donors, recipients, and implementing partners. In terms of project governance, the working framework should be the HRBA, which provides a legal foundation to support the SDG and replace other approaches based on needs or solidarity so that higher levels of Human Development can be achieved. Participation is a key element that is shared by the LFA/PCM and the HRBA and can be integrated into a shared project governance model that clearly establishes roles, responsibilities, decision making mechanisms, and accountability. Development Cooperation projects could benefit from the adoption of specific tools and techniques developed in the field of project management to enhance stakeholder engagement and improve project governance.

The LFA is often not fully implemented, often concentrating efforts on the definition of a LFM that responds to donors´ requirements and expectations. The LFM ends up becoming a rigid commitment whose ability to adapt to changing project conditions is limited. The LFM is often used as the core document that defines a project, as it summarises purpose and metrics extremely well. Development Cooperation projects greatly benefit from the logical structure and synthetic view that the LFM provides in terms of project identification, design, monitoring, and evaluation. However, it needs to be complemented by other tools that facilitate professional project management. These tools are based on recognised good practices and can integrate the LFM into canvas/dashboard tools. This type of tool would be suitable for the multi-dimensional perspective that project managers need throughout the whole project lifecycle.

In fact, project managers in Development Cooperation projects face as many challenges and constraints as in any other field. It is possible that they face even more challenges than project managers working in other fields, given the specific features of these types of projects Development Cooperation has not been able to fully enjoy the advantages that the experience, knowledge, and the standardisation of the professionalised project management practice provides. There is a need to strengthen the

capacities of Development Cooperation Project Managers and professionalise this role. This could be achieved by adopting more project management methodologies and standards, or by developing new methodologies that go beyond the limitations of the LFM by integrating crucial elements that it does not cover, such as the time component, the distribution of roles, responsibilities, accountability, risk management, stakeholder engagement, and quality control. A comprehensive approach to the Project Management of Development Cooperation projects should be made available to improve the unquestionably positive contribution that these types of project make to ensure a better world for all, one project at a time.

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CHAPTER 4

Projectification and Academia

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ABSTRACT

The projectification of academia helps higher education institutions improve their competitiveness so that they can respond to the increasingly demanding requirements of society. Projectification allows academics to better organize the heterogeneous set of activities that make up their teaching work. It helps to manage research projects more efficiently and to prepare better proposals for public calls. In university management, implementing organizational structures such as a Project Management Office (PMO) helps an institution to deploy its strategy through a set of projects, setting priorities, and optimizing management by sharing resources. Projectification also entails changes in organizational culture. Change processes must be carried out with consensus and at the right pace so that academia does not lose its traditional values of excellence, flexibility and autonomy.

Keywords: university projectification; research projects; project management office; university management.

1. INTRODUCTION

Since the paper by Midler (1995) that analyzed the experience of the Renault automotive group, interest in the projectification of organizations has grown exponentially. Many scholars have studied how to implement projectification, and the implications this has for firms, the public administration, and society.

Academia is not and cannot be unaware of this trend. On the one hand, many of the activities carried out by universities are either projects or can be managed as projects; on the other hand, the methodologies and standards provided by project management can help universities to face future challenges.

Eschenbach et al. (2005) showed that we could understand much of the work of university professors as being a collection of projects: teaching courses, writing scientific papers, writing research project proposals for different public and private calls, preparing teaching materials, etc. All of these activities have constraints on time and resources, and there are objectives to meet.

Many of the activities carried out by universities are projects. For instance, research projects, projects for developing and implementing information and communication technologies (ICT), and projects for constructing and improving buildings and facilities. But many other activities could benefit from working in "*project mode*". The following ideas are just a few examples of activities that can be managed as projects: the design and implementation of new training programs, the performance of quality assurance programs, and the organization of scientific congresses and conferences to disseminate research results.

Furthermore, projectification can help universities to face the newchallenges of the 21st century. Like any other institutions, universities are required to use their resources efficiently and to achieve good results in their functions of teaching, research, and knowledge transfer .

In recent decades, the academic environment has become much more competitive as the complexity of activities has increased. Some of the reason for this are:

—The creation of many new universities has increased competition. They have to work harder to attract new students and to keep existing ones.
—The demand for greater internationalization has grown in a more globalized world.
—The two previous points explain why there is increasing interest in appearing high up on university rankings, such as the Shanghai and QS rankings.
—The proportion of academic activities that the public administration finances through projects in competitive calls has grown: research projects, teaching innovation projects, inter-university cooperation, etc.
—New teaching methods: flipped classroom, project-based learning, etc.
—New opportunities for developing hybrid teaching methods, integrating face-to-face and virtual (*online*) learning.

As a result, the performance of academia is increasingly evaluated using the criteria for assessing firms and profit-oriented institutions (Siekkinen et al., 2020). We are witnessing the paradox that the autonomy of universities as institutions has grown, but the personal freedom enjoyed by academics has decreased (Carvalho & Diogo, 2018).

In fact, university staff are under constant evaluation throughout their academic careers. For example, in Spain, the performance of academics is periodically evaluated with six-year research and five-year teaching assessments. Taking up a

new university position or tenure (Assistant, Associate, Full Professor, etc.) must be preceded with accreditation from a National or Regional Agency.

Improving project management competencies in the university landscape can help academics to fulfill their objectives. And for universities as institutions, better project management can be helpful to manage this growing complexity so that they can respond to the demands of efficiency and effectiveness that society requires.

Not only does projectification mean introducing project management methodologies and standards, but it also means undertaking cultural and organizational changes that support the whole process. These changes usually require adaptation periods, so that universities do not lose their traditional values of excellence, flexibility and autonomy.

In this chapter, we will address issues related to projectification for each university functions: teaching, research-knowledge transfer, and management. We will devote a section to each of these functions, analyzing project characteristics and addressing how projectification can help academics to be more efficient and competitive.

In the section on university management, we will address the development and implementation of a university Project Management Office (PMO). This is an organizational structure that allows the strategic plan of a university to be deployed throughout with a collection of projects. Many of the ideas in this sub-section are based on the author's experience as the head of the Projects and Strategy Department at the University of Valladolid (Spain).

The penultimate section will be devoted to summarizing the main advantages of projectification in academia and reflecting on the challenges and difficulties to be overcome during the projectification process. We will end with the' conclusions of the chapter.

2. Projectification of teaching

Teaching activities take up a large part of an academic's time. The quality of teaching activities impacts students' education and their integration into the employment market. The general public's perception of universities is usually restricted to teaching.

In an increasingly competitive environment, with more educational programs and a decreasing number of students, universities have to compete for students, offering excellence in teaching and designing training programs that facilitate integration into the labor market. In this context, teaching is evaluated using criteria similar to those used by private entities (Siekkinen et al., 2020), setting strategic and operational objectives, and using key performance indicators that reflect drop-out rates, job entry rates, survey results, etc.

We are witnessing a general increase in professors' workloads (or, at least, their perceived workloads) (Pace et al., 2021), including a very significant increase in

the administrative work related to teaching (Tight, 2010). Working hours are becoming increasingly fragmented so that professors can cope with multiple activities (Dollinger, 2020): Preparing lectures, exercises and activities, tutoring, dealing with students, setting and marking exams, answering e-mails, proposing improvements to syllabuses, etc. Professors have become managers of many small projects taking place at the same time, and the philosophy behind project management can help them to manage their time and work better.

As universities move towards the projectification of "everyday work", there are many other education initiatives that can be managed as projects, for example:

—New training programs, proposals and implementation: bachelor's degrees, master's degrees, doctorates, and university extension courses. Related administrative procedures for their accreditation.
—Training programs for improving teaching skills.
—Development of distance learning courses (online).
—Erasmus-type student mobility projects and Erasmus+ collaboration projects.
—Teaching innovation projects.
—Etc.

Projectification promotes efficiency by orienting professors' work towards achieving measurable objectives, which must be completed to deadlines and with predefined resources. However, we must mention that excessive projectification can lead to a loss of the flexibility required in teaching and learning processes. Ultimately, the rhythms of teaching activities must be adapted to the specific needs of each student. If teaching is excessively projectified, the degree of autonomy that students need to adjust their learning to their specific interests might also be affected.

Because of the synergies between project management and teaching methodologies, the Project Based Learning (PBL) methodology is worth mentioning in this section. This learner-centered teaching methodology fosters student autonomy, collaboration, communication and teamwork, and it allows situations that are similar to those faced in the real world to be dealt with (Kokotsaki et al., 2016).

The deployment of ICT and the internet favor these teaching innovations since they allow students to have practically unlimited access to information. Indeed, ICT improvements are bringing about significant changes to teaching and learning processes: the role of professors as "*knowledge nodes*" is decreasing , and they are moving to a newer role as "*coaches*" who accompany students throughout their learning process.

PBL allows students to engage in genuine projects where real products or services are delivered (Guo et al., 2020). This methodology uses the project concept to foster the acquisition of knowledge and skills. Therefore, PBL and project management benefit each other.

On the one hand, knowing project management methodologies can improve student performance and efficiency in PBL initiatives. Rooij (2009) shows how prior knowledge of PMBOK facilitates interaction between work teams and enhances the spirit of collaboration. Fioravanti et al. (2018) combine software engineering project management teaching with PBL. Similar works recommend the introduction of basic knowledge of project management methodologies at the beginning of PBL teaching initiatives because students will be able to approach their projects understanding concepts such as time management, scope, risks and stakeholders.

Furthermore , PBL has been successfully used to improve project management competences in university programs. For example, De Los Ríos-Carmenado et al. (2015) use a PBL-based teaching scheme to help students to develop the International Project Management Association (IPMA) competences on undergraduate and master's degrees. Torres et al. (2019) focus on construction projects, Arantes do Amaral et al. (2015) teach international cooperation and non-governmental organization projects, and Jaime et al. (2016) address software projects.

3. Projectification of research and knowledge transfer

Research, as a knowledge-generating function, is one of the essential missions of universities. Good research is a necessary, but not sufficient contition for a good knowledge transfer that contributes to the economic value of research results. In addition, research provides the foundations for teaching students the latest technological developments, helping to create better professionals. Therefore, it is important to consider how the project-based approach and project management methodologies can contribute to better research.

In this section, we will characterize the research and development (R&D) projects carried out by universities, and we will also address knowledge transfer projects, mainly carried out with collaboration projects with companies. We dedicate a specific sub-section to the "*European Project Offices*", which are responsible for supporting researchers in different phases of research projects, such as searching for partners or writing proposals. This structure should not be confused with the Project Management Offices (PMO) that we will discuss in the section devoted to the projectification of university management.

3.1. *Featuring university R&D projects*

University research projects have specific characteristics that make them more complex than other projects.

In most projects carried out by private companies, funding is provided through equity and debt. But in universities, funding usually comes from public funds obtained through regional, national, and European calls or under agreements and contracts with private institutions.

University projects are high-risk since they are usually on the scientific and technological knowledge boundary. Therefore, unlike many applied business projects, the objectives of university R&D projects may be more abstract and subject to unforeseen changes during the project lifecycle (Huljenić et al., 2005) where a project may be defined as involving a group of interrelated activities that are planned and then executed in a certain sequence to create a unique output (product or service.

Many of these projects are carried out by a consortium involving partners from different institutions, universities, companies and other organizations, each with its particular objectives and interests. The partners can often only work on projects part time i.e., university professors and researchers have to combine their project work with their teaching activities and participation in other research work or teaching innovation projects. In many projects, the teams also combine a few senior researchers with a greater number of junior researchers, many of whom are working on their doctoral theses and do not have a stable contractual relationship with their institutions (Riol & Thuillier, 2015)the literature reports friction between management and research. In this study, we investigate whether and to what extent academic research projects can be managed using classical project management (PM.

Moreover, due to the nature of public calls for proposals, both costs and deadlines are rigid:

—The deadline for submitting the proposal cannot be postponed. In many cases, the period of time between the publication of the call and the deadline is very short, causing significant pressure on research groups.
—Completion and administrative justification deadlines cannot be exceeded, except for in the case of a few calls, provided that any extension is sufficiently justified.
—Costs cannot exceed the budget specified in the proposal. Cost overruns are not permitted.
—There are strict rules affecting the eligibility of cost items and their distribution.
—The funding office requires many detailed administrative reports.

In conclusion, R&D university projects are challenging to manage. *Professional* project management can help researchers in their work by raising awareness of the role of risk management and stakeholder management in multi-partner projects and aspects related to writing project proposals and progress reports.

Introducing project management methodologies throughout the entire lifecycle of an R&D project allows a new perspective to be integrated that complements the traditional "scientific management" view. While the latter focuses on excellence

in scientific and technical decisions, project management focuses on achieving objectives and the final scope within time and resource constraints.

The advantages of merging these two roles are evident in matrix organizations, where functional managers (managers of scientific specialties in the case of R&D projects) coexist with project managers. Although the heterogeneity of roles and objectives can lead to conflicts, the balance between the two visions improves the outcome of projects (Cleland (1968); Katz & Allen (1985).

We are not explicitly suggesting that university R&D projects necessarily need to include a different scientific leader and a project manager but that both *ways of thinking* should be present within the project. However, appointing different people to these roles could be appropriate for large or very complex projects, or when the funding authority weighs this positively when giving a grant.

3.2. *Knowledge transfer projects collaborating with firms*

Collaboration between universities and private companies is crucial for improving the competitiveness of countries and regions. However, numerous studies indicate that some "*cultural barriers*" hinder the development of joint projects. Some examples of these are:

—Different ways of understanding what efficiency means.
—Heterogeneity of priorities and incentives.
—Different concepts of the term "*deadline*".
—Lack of PhD students with research skills working for companies (Lopez-Paredes et al., 2009).
—Conflicts over intellectual and industrial property issues.
—Etc.

The issue is so important that scientific literature is full of papers addressing success factors in university-business collaboration (see, for example, Awasthy et al. (2020); Brocke & Lippe (2015) or Pertuzé et al. (2010)). There is a consensus that it is necessary to have professionals who understand both worlds, have managerial and entrepreneurial skills and are used to *networking*. It is also important to "align" the administrative processes of both institutions so that "filling out paperwork" is a means to favoring joint work instead of a source of conflicts.

Barnes et al. (2006) suggest that sound project management can reduce the "cultural gap" between business and academia. Project management standards and methodologies could be used to solve typical problems such as conflicting deadlines or the choice of partners and managers.

Furthermore, we should mention that the project approach allows final goals to be focused on, when how and by whom: thinking about deliverables, time, costs, and people helps professionals from different organizational cultures to

work together efficiently. In other words, project management allows a common language and methodology to be used, bridging any organizational cultural divides.

3.3. *Support to research activities: European Project Offices*

The complexity of the projects funded by the European Commission has grown throughout the different Framework Programs, especially in the latest programs: Horizon 2020 and Horizon Europe. Participation is encouraged by forming large consortia comprising many companies, technology centers and universities, and the budgets for projects can reach several million euros. Research topics must be related to the priorities of the European Commission (*clusters*). These projects require a high degree of professionalism, generic knowledge of project management, and also specific knowledge of the characteristics of the calls for proposals and how the "Brussels machinery" functions.

Therefore, many universities have created organizational structures that support researchers who participate in European projects. These organizational structures are given names such as "European Projects Office", "Technical Department of Support to European Projects", etc. Although initially conceived to support research projects, the scope of these offices has been progressively extended to other types of European projects (Erasmus+, Marie Sklodowska-Curie grants, Interreg, etc.), as well as to national and regional projects (although the term "European" is retained).

Most of these offices provide several of the following services:

—Support to choose the right calls for proposals according to a group's or institute's research activities.
—Assistance in finding project partners.
—Advice on drafting proposals. Final review of proposals.
—Negotiation, if necessary, with the Commission's project officers.
—The signing of contracts. Advice on intellectual and industrial property issues.
—Support for management activities.
—Support for the organization of meetings, congresses and dissemination activities.
—Support for administrative tasks, reporting, invoicing and payments, etc.

Thanks to the expertise of the European Project Offices on writing proposals, success rates and fundraising have increased.

European calls for proposals are becoming more complex and require the participation of companies, technology centers, and associations. Project results need to be oriented towards innovation and impact European economies. Therefore, these projects increasingly require the management of many stakeholders, business development activities, innovation management, procurement management, etc.

The traditional "*pure*" scientific management of the first Framework Programmes is no longer suitable, professional project management is needed.

Some literature reports how these organizational structures help manage international R&D projects and, in some cases, evolve into the starting point for general university PMO. (Wedekind & Philbin (2018); Fernandes et al. (2021) o Philbin (2018)such as the development of multidisciplinary teams, ensuring alignment of the collaborative partners and generating the required level of impact from the project. The project management office (PMO).

4. Projectification of univesity management

The strategic and operational management of higher education institutions requires a multitude of actions to be implemented. Many of these actions are projects and are managed as such. Examples of these are: everything related to infrastructure management, building construction and new facilities. It is also the case of Information and Communication Technologies, especially the development and adaptation of new software applications for teaching and administrative support to the research.

Many other management-related initiatives can easily be managed as projects, given that they have a clear individual objective (deliverable), have a beginning and an end, and their execution is subject to economic or resource constraints. For instance:

—Implementation of quality assurance systems.
—Labor risk prevention initiatives
—Internationalization programs.
—Creation of strategic plans, both at university and faculty levels.
—Etc.

It makes sense to incorporate methodologies and standards that improve the competences of universities for managing these and other projects.

The design and implementation of a university strategy is decisive for its success (Shattock (2000); Stukalina (2014); Yureva et al. (2016)). Therefore, higher education institutions should undertake projects that serve to deploy each university strategy, i.e., perform project portfolio management.

A Project Management Office (PMO) is an organizational structure that can implement both of these ideas (improving project management skills and implementing project portfolios that deploy each strategy). Universities should create this structure (also called Centers of Excellence in Project Management, CoEPM) in the same way many companies and administrative bodies do.

We need to highlight that the European Project Offices discussed earlier are a different structure because they focus on searching for partners and providing proposal preparation assistance., PMOs, however carry out portfolio management

activities, including the choice and prioritizations of projects, deployment of strategies, andmanaging projects.

But, in practice, do universities have PMOs? And if they do, do they exist as as formal organizational structures or as a group of people who perform carry out of their functions?.

We have not been able to find muchliterature on this subject, but we have performed an "informal" search on university websites. This search has led us to understand that:

— Many of the highly-prestigious universities such as Harvard or Stanford have PMOs
— PMOs are more common in the English-speaking world: the United States, Great Britain, Canada, etc.
— Many PMOs are limited to specific areas or departments like information and communications technology (ICT).
— The most important function of PMOs that work at a global level (not only for ICT), is the selection of strategic projects, followed by giving support by introducing project management methodologies.

It is less common to find this type of structure outside the English-speaking world. In a study of Brazilian universities, Oliveira et al. (2017) show that most universities lack PMOs, and those which have them are usually circumscribed to specific areas of engineering or IT.

In this chapter, we suggest that a PMO can improve university management, contributing to better deployment of an institution's strategy and an improvement in the project efficiency.

In this section, we postulate some ideas about the implementation of university PMO . Some of these reflections are based on the author's experience as Head of the Projects and Strategy Department at the University of Valladolid, in 2017 and 2018. Consequently, the reader should be aware that the statements might contain some bias.

The *Projects and Strategy Area Directorate* reported to the *Vicerectorate for Strategic Planning and Quality*. The purpose was to improve the project management competencies of the institution, with the ultimate goal of contributing to better deployment and implementation of the university's strategy. Rather than developing a formal PMO, the aim was just to implement some of the typical functions of this office: deployment of the strategy using project portfolios, establishment of priorities in project execution, coordination of resources and progressive introduction of project management methodologies.

It was a general PMO, in so far as it provided services to all the strategic areas of the university. But in practice, most of the projects that benefited from its ac-

tions were related to information and communications technologies. In fact, the directorate office was located in the STIC (ICT Service) building instead of where other directorates were based, which is closer to the main rectorate building.

4.1. *Meaning and functions of a PMO*

A university PMO shares many characteristics with the PMOs in other organizations, such as firms or public administrative bodies. The seventh edition of the PMBOK (Project Management Body of Knowledge) defines a PMO as "*a management structure that standardizes governance processes related to projects and facilitates the sharing of resources, tools, methodologies and techniques*" (PMI, 2021).

There are many types of PMOs, and they have different functions. Some examples of typical functions are support and advice for project managers, portfolio management and alignment of corporate strategy with projects, training initiatives and executive project management. Using surveys carried out with more than 500 PMOs, Hobbs (2007) reported that there were up to 27 functions that can be grouped into five functional groups: project monitoring and control; development of project management competencies and methodologies; multi-project management; strategic management; and organizational learning.

A PMO can be a formal or informal structure, i.e., it can be explicitly displayed on the organizational chart, or it can be a department or section that performs, in many cases on a part-time basis, some of the typical functions of a PMO (Artto et al., 2011). It can also serve an entire organization or only a specific area.

One of the most common objectives of all PMOs is to improve organizational project management competences and promote the use of methodologies and standards. As a result, project execution efficiency, compliance with deadlines, costs, and scope improve. To achieve this aim, PMOs should promote training activities and support project staff throughout the project lifecycle.

Projects are temporary organizational structures (European Commission, 2021). Therefore, a PMO is a link between permanent and temporary organizations. This means that a PMO can carry out many important functions for an organization involved in projects. First, a PMO can serve as a repository of lessons learned from previous projects, processing errors and best practices and incorporating them into an organization's methodological assets. Therefore, PMOs can play an important role in managing and maintaining a company's knowledge, not only for use in other projects but also for the rest of a permanent organization (Cunha et al., 2014). Pemsel & Wiewiora (2013) suggested that a PMO play the part of a knowledge broker.PMOs can contribute following-up the professional careers of people whose activities are mainly linked to projects, as the continuous changes of "boss" after the end of each project make it difficult to monitor individuals' professional development.

An advanced PMO performs project portfolio management tasks, translating organizational strategy into a set of projects, allocating and optimizing resources, and prioritizing projects.

4.2. *Setting up a university PMO*

Logically, the greater the scope of a university PMO, the better the set of services it can provide. However, in the first phase, we should address two related objectives: improving project management skills and developing portfolio management activities to link a university's strategy with its projects. In the Hobbs (2007) framework, these functions correspond to the dimensions of competency and methodology development and strategic management. Other functionalities can be addressed later, given that the growth in the organizational maturity of project management must be continuous. But we also understand that these two initial objectives are a major improvement on the initial situation that most universities find themselves in.

A duale approach needs to be implemented:

—Top-down: make the rectorate team aware of the importance of implementing the university's strategy and involve them and the administrative and services departments in this task, as they will have to make important decisions regarding which projects to carry out, priorities and resource constraints, etc.
—Bottom-up: actively promote the advantages of adopting project management methodologies and standards among project managers.

Establishing a university PMO should be approached as a project in itself, defining objectives, scope, deadlines, costs, stakeholders, risks, etc. The decision to carry out this project must be taken at the highest university levels since a critical factor in its success is the support of the institution throughout the process of creating the PMO and throughout its lifecycle.

Top-down. From university strategy to projects

The top-down approach assumes that the university has an up-to-date strategic plan approved by its governing council. This type of plan might not actually exist on paper, but in practice, most universities have "*strategic lines of action*" concerning the offices of the main vice-rectors. In any case, strategic lines should be agreed upon by consensus and approved by the governing body of the institution.

Usually, an important factor for the success of a PMO is that the rest of the organization that it represents is aware of its existence (Hobbs et al., 2008). In large organizations such as universities, this means making a significant effort to ensure that all management areas know of its existence and the services it provides.

Therefore, once the decision to implement a PMO has been approved, it is advisable to organize individual meetings with different area managers (vice-rectors, service directorates, departments, etc.). These managers will become interested parties and a reticent or negative attitude towards the PMO can affect its success. This is because the PMO will be responsible for carrying out some concerned with some delicate tasks, such as deciding which projects will be carried out, which will have priority in terms of time and resources, which resources will have to be shared, and who will lead which projects.

According to Hobbs et al. (2008), these decisions involve "*politics and power flows*". Therefore, for institutions such as universities (traditionally less hierarchical than private companies), PMO implementation should be based on achieving consensus and on explaining to all the stakeholders that the PMO will not decrease their power or influence; it only channels different interests to achieve overall improvement of the institution.

Once the consensus and support of the university governing bodies have been secured , organizing a joint dissemination event with the assistance of other management areas is advisable. After the important stakeholders have given their support, the next PMO development steps are easier to implement, as they deal with more technical issues on which extensive study has been carried out (see, for instance, Rad & Levin, (2002); Taylor & Mead (2016); Hill (2007); Crawford (2010)).

Over time, the operation of a PMO will continue to require consensus-oriented leadership, as conflicts of interest will most likely arise in areas such as the management of priorities and resource utilization. Tensions may also occur if a PMO tries to standardize some aspects concerning the conception and management of projects, which can often mean changes in how people from different departments work with and relate to each other.

Bottom-up. Improving project management competences

This approach aims to introduce standards and methodologies in project management within the different management areas of a university, especially in areas that will develop the most strategic projects.

The level of project management knowledge in universities does not differ from that of other types of public and private organizations. Except for specific sectors that are exceptionally skilled in providing excellence in project management, other sectors have adopted these methodologies in an extremely heterogeneous manner, and there is empirical evidence of this. This issue has been written about by several experts for different sectors, such as Golini et al. (2015) for international development cooperation projects, Garcia Escribano et al. (2022) for industrial projects in Small and Medium Enterprises , SMEs, and Crawford &

Helm (2009) for public sector organizations. Therefore, any attempt to improve efficiency through projectification requires improving project management skills in all sectors, including universities.

Like other technical areas, a pilot test involving a small number of projects can be a good start. The first option could be to select a group of projects of high strategic importance but moderate complexity. Within this group, the projects that have managers with a certain predisposition to adopting new challenges and learning new ways of doing things should be chosen. It is necessary to explain to these managers what the pilot test consists of, to share basic concepts of project management, and to show that the introduction of methodologies will help them to manage projects better and lead to fewer problems during their execution.

Specific training can be performed if necessary. But usually, the people involved will have some project management experience, so this step might be unnecessary. Instead, meetings could be a more fitting way to raise awareness of the essential aspects of any project: clear definition of requirements and objectives, identification of stakeholders and establishing how to manage communications, identifying and managing risks, scope, resources, etc.

During the pilot projects, the manager needs to be accompanied through most of the process. For example, it is a good idea to hold a session to identify stakeholders, deciding which people or departments the project could affect, with whom it could interfere, and which parties might not seem *a priori* to have a decisive role, but still must be informed of progress, at least during the first phases of the project. Communication strategies should be drawn up with each of these stakeholders. Similar sessions can be held on scope, risks, etc.

The outcome of these sessions is usually very satisfactory. In many cases, people make comments such as: "I now understand why in a previous project we had this or that problem", "we are taking into account many interesting aspects that we had not seen before", etc.

At this point, we can begin to introduce document templates that facilitate the previous analyses, as they can now be understood as a means to facilitating the analysis instead of being seen as an administrative burden (*filling out paperwork*).

During the first projects, it is crucial to focus on aspects such as stakeholder management or risk management because they are usually "easy wins", i.e., they enable projects to be improved quickly, generating a positive attitude towards incorporating new methodological elements.

5. Synthesis: opportunities and challenges of projectification

During recent decades, universities have become much more competitive and complex. They must compete to attract students and produce technological innovations that are beneficial to the socioeconomic environment. In this chapter, we

have argued that, in this new context, projectification can make universities much more efficient and competitive in performing all their roles.

Projectification can help academics better organize the set of (heterogeneous) activities that constitute teaching. On a personal level, the philosophy behind project management allows professors to organize themselves better, which is especially useful in a context such as the present one, where teaching involves a multitude of activities that are carried out in the same period of time. Metaphorically, we could argue that the teacher is a *portfolio manager of many small projects*.

However, we have seen how the excessive projectification of teaching activities can affect the flexibility required in the teaching-learning process. Ultimately, student learning is the aim of the process, so teaching rhythms (and to some extent, contents) should be adapted to the abilities and interests of the students. Indeed, some academics and business managers advocate for an education system that allows learners to determine the content and learning paths with some discretion (Henri et al., 2018).

In research, project management methodologies provide a complementary dimension to the traditional work of "scientific management", which is mainly focused on making scientific-technical decisions of excellence. Project management focuses its attention on the objectives and scope of the project, on deadlines, and efficient resource management. The balance between these two perspectives enriches a project, contributing to more satisfactory and efficient solutions.

Projectification helps better project proposals to be written for public calls, as researchers can show that they know how to use the tools and methodologies required to manage a project efficiently. And during the execution of a project, projectification helps researchers to focus on critical aspects such as risk management or how to lead communications with the partners that comprise the consortium and are key stakeholders.

Public calls for proposals to finance research projects contribute to the rationalization of research by including some of the advantages of projectification. But these calls can also condition what topics are researched and how they are researched. Based on interviews with academics, Franssen et al. (2018) have shown that it can affect:

—The degree of knowledge advancement. Disruptive projects or those with highly innovative elements are high risk; therefore, fear of not achieving objectives could prevent researchers from addressing them. This can have very adverse long-term effects , hindering disruptive advances in science.

—The research topics funded must meet the requirements of the calls for proposals. Obviously, it is up to each funding agency to set its own priorities, and the calls enable governments to deploy their economic and industrial policies. But it is also true that less flexibility in research topics could mean that many important issues are not funded.

Therefore, public administrative bodies and universities should search for a balance between research on specific priorities and the traditional flexibility and freedom of enjoyed by researchers.

Knowledge transfer and university-industry cooperation are key factors for the economic development of regions and countries. The common language provided by project management standards helps to reduce the effects of the "*cultural gap*" between academia and business, a "*cultural gap*" that is the main barrier to collaboration in research and transfer projects. The common language of project management can be a meeting point that enables parties to work together, with ""each party respecting the particularities of the ' organizational cultures of others. Project management reduces the complexity of interactions by focusing on clear goals, establishing how to achieve them, when they should be completed, and who is going to carry them out. Metaphorically, we could say that projectification provides a low-context language, as shown in the intercultural communication model created by Hall (1976). Projectification reduces misunderstandings and focuses the parties on taking action.

In today's highly competitive context, universities must deploy clear strategies establishing "*where to go and how to get there*". As in other types of organizations, projectification can help to execute this strategy by defining a set of projects to deploy it, setting priorities, coordinating joint execution of these strategies, and optimizing resources. Many universities, mainly in the English-speaking world , have organizational structures that perform Project Management Office (PMO) functions.

The process of creating and operating a university PMO is not very different from that of any other organization. However, the academic community has some special characteristics such as wide variety of actors and less clearly. Therefore, the implementation of a PMO must be built on leadership based on consensus. This is because the PMO activities affect very sensitive decisions, such as which projects will be priorities, when they will begin or what resources will be allocated to them. Therefore, staff must receive an explanation about what the PMO will do and its benefits for the university before it is implemented.

Once we have summarized the positive points of projectification in the university (and have also provided warnings about some of the negative ones), we should reflect on how the current academic culture is aligned with projectification.

The academic world is unique for many reasons. University researchers and professors are well-educated people with doctoral degrees and experts (or in the process of becoming experts, in the case of young researchers) in scientific-technical fields.

Scientific culture rewards excellence, besides other logical motivations, the academic world is sensible to the recognition by colleagues and society.. Their work, fundamentally intellectual, requires space for creativity and flexibility, with

minds that are open to generating new scientific paradigms that represent disruptive advances. Undoubtedly, this culture of excellence is behind the technological and social advances experienced, especially during the last two centuries, which is when universities have developed the most.

Projectification involves a more executive approach, which requires incorporating project management standards and methodologies into the organizational culture. Project culture emphasizes planning and control, objectives, timelines, costs, risks, stakeholders, etc. Is modern academia, with the obvious exception of professors in areas related to project management, familiar enough with these standards and methodologies?

Riol & Thuillier (2015)the literature reports friction between management and research. In this study, we investigate whether and to what extent academic research projects can be managed using classical project management (PM conducted interviews with academics to understand to what extent they used project management methodologies. They concluded that academics did not use the typical industry-standard tools and methods because they were unaware of their existence; instead, projects were executed informally and intuitively, applying tacit knowledge.

In research projects, management documents are usually restricted to those required by a public funding entity, such as activity schedules, work breakdown structures, budgets and project reports (Fowler et al., 2015). And in many cases, once funding has been received, they are not used for project implementation.

This lack of methodological education comes as no surprise since the professionals coordinating research projects are experts in their scientific domains and have dedicated their entire careers to these fields. With some exceptions, the training in projects that academics have received has been limited to the knowledge of the characteristics of public calls for proposals and the associated administrative requirements.

Therefore, we conclude that it is necessary to promote generalized training targeting the entire university community, both academics and managers. In the first phase, talks and workshops that address fundamental concepts would be covered. However, no matter how simple this initial training may be, it would probably bea great leap forward and would lay the foundations for further development. This training should emphasize the benefits of project management, pointing out that the small increase in the administrative burden (*filling out documents)* that is could entail would be compensated for by the time saved and the greater certainty of project success.

6. Conclusions

Academia is not separate from the current trend of projectification, which affects all organizations and society as a whole. The projectification of teaching,

research and management activities, and the consequent introduction of methodologies and standards in project management, contribute to improving the competitiveness of universities so that they can better respond to increasingly demanding societal requirements.

Project management helps academics better organize the many activities that make up their teaching and enables them to prepare better proposals and manage research projects.

At a managerial level, we have advocated for the development of PMO-type organizational structures that translate university strategies into projects, prioritize them, allocate resources and jointly coordinate projects . The projectification approach makes it possible to materialize this strategy into specific tangible results (deliverables), on specified dates and with established resources.

As in other institutions, projectification means changes in the organizational culture, requiring time and patience. It also requires awareness and training to improve organizational competencies in project management.

Nevertheless , the processes of change must be led with the consensus of all parties, and the pace of change must be measured so that academia does not lose its traditional values of scientific excellence, flexibility and autonomy.

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CHAPTER 5

Projectification and the European Union

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Abstract

This chapter aims to provide insight into the phenomenon of European Union projectification. The paper is conceptual in nature and draws on the results of several research projects conducted by the authors, who represent two disciplines - management and political sciences. In the article we first discuss what distinguishes EU projects from other projects. Thereafter we describe the projectification of the EU using an analytical framework based on three levels (micro, meso and macro). The chapter ends with a discussion on consequences of EU projectification and possible directions for future research on this phenomenon. Taking a general view of the findings, we believe that it is necessary to move beyond the depoliticising tendency of seeing EU projects as neutral tools and opening this area up to broader debates on the politics of projects.

Keywords: projectification, European Union, EU project

1. Introduction

The European Union can be regarded as a supra-national organization representing 27 European countries. It is based on the notion of a single market, and member states have continuously developed common policies within areas such as climate, research & innovation and migration. Yet, besides policy areas within which common and binding regulatory frameworks have been developed, we also find development of policies in areas that the EU has little or no formal jurisdiction, such as social policy, education, social inclusion and regional development.

Harmonisation in these policy areas has primarily developed through shared understandings, agreements and projects, where governance is shaped through processes such as learning, collaboration, standardisation and benchmarking (e.g. Kahn-Nisser 2014; Bernhard 2011). These non-coercive or "soft" modes of governance are dependent on the active willingness and participation of national and subnational actors.

One main way to incentivise member-states to engage in EU policy work is through project-funding (Carlsson et al 2022), which has developed into a key function of EU policy-making during the past decades (Büttner & Leopold 2016: 41). For the current long-term budget (2021-2027), the EU has allocated € 1.211 trillion through what they call the Multiannual Financial Framework (MMF) and a vast majority of that is dedicated to project funding via a great variety of programmes and funds. Roughly a third of the MFF (€372.6) is allocated to "Cohesion Policy", a policy implemented through three large funds - the Cohesion Fund, the European Regional and Development Fund and the European Social Fund. The aim of EU Cohesion Policy is to contribute "to strengthening economic, social and territorial cohesion in the European Union", including the correction of imbalances between different regions and delivering on EU priorities within the context of growth and development (European commission webpage, 2022a; ECDG, 2021). Taken together, these funds and programs have funded millions of projects through-out European cities, regions and states (European Commission webpage, 2022b)[1]. The effects of EU-funding have been described in terms of a growing ecosystem with a range of organisations, individuals, agents and whole "project classes" (Kovách & Kučerová, 2006), where new professions have developed to acquire, manage, implement, evaluate and assess EU-funded projects (Büttner and Leopold 2016). These professions also disseminate best practices and good examples of projects throughout Europe. As a consequence, the EU has been described as one of the main sites for, and push factors of, projectification (Godenhjelm, et al., 2015; Jałocha, 2019).

1.1. *The aim of the chapter*

In this chapter, we aim to illustrate the complexity of EU projectification. The chapter is conceptual in nature and is built on our own (and others) previ-

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1. The European Regional Development Fund (ERDF), is concerned with investment in the social and economic development of all EU regions and cities. The Cohesion Fund (CF), is used for environment and transport in the less prosperous EU countries. The European Social Fund Plus (ESF+), aims to "support jobs and create a fair and socially inclusive society in EU countries". Finally, the Just Transition Fund (JTF) "support the regions most affected by the transition towards climate neutrality" (ref: https://ec.europa.eu/regional_policy/en/funding/available-budget/)

ous research on the phenomena (e.g. Jałocha, 2012; Fred, 2018; 2020; Fred & Godenhjelm, 2023; Mukhtar-Landgren, & Fred, 2019; Jałocha, 2019). With our backgrounds in both management science and political science we start out with the seemingly simple, but pivotal, question: what is EU projectification?

We understand projectification as a complex phenomenon that is not only organisational in nature. By considering it as a cultural construct (Packendorff, Lindgren, 2014), we take into account the consequences of this phenomenon for individuals, groups and societies. Moreover, projectification follows a trend within which the lives of individuals, as well as the economic activity of companies and organisations are in the process of constant transformation (Kalff, 2017). Therefore, considering projectification in general terms, we define it as the *institutionalization of projects in society, in terms of the process where projects become embedded within all levels and areas of society through beliefs, norms, values, structures, and modes of behavior* (Jacobsson and Jałocha, 2021). Consequently, we believe that projectification can be a managerial approach, a societal trend, a human state and a philosophical issue (Jacobsson and Jałocha, 2021).

A broader understanding of projectification allows us to go beyond a purely mechanistic, organisational understanding of this phenomenon and analyse it in relation to different levels of social structures. Therefore, as an analytical framework, we have adopted a commonly used typology of three levels, with which the phenomenon of EU projectification can be observed and analysed. The levels –micro, meso, macro– are used to understand the types of behaviour that occur at the different levels and the interconnections of the levels. The levels are analytical and ideal-typical, meaning that EU projectification is regarded as a phenomenon that permeates several levels of social and organisational life, yet it is possible to discern specific characteristic elements at each separate level. Our objective is to characterise EU projectification at the micro, meso and macro levels and consider how these levels interrelate. In short, the *micro level* relates to processes of change for individuals or groups of individuals. The *meso level* uses organisation as the unit of analysis and focuses on how organisations are transformed or adapted as a result of EU projects. The *macro level* takes an overarching perspective on whole systems and the relations between different organisations or between member states, and how these relations and actors facilitate project funding systems and EU funded projects. In practice, the levels are interrelated. This means that changes in the way public policies are formulated or how the funding mechanisms are organised at a macro level can have consequences for the individual civil servants working with EU funded projects (at a micro level).

The chapter is organized as follows. First, we discuss what an EU project is and how it differs from the traditional understanding of a project as a management method. We also develop the notion of EU projects as policy instruments used for implementing EU goals. We then discuss EU projectification based on the

three analytical levels of observation, and with empirical examples primarily from Poland, Sweden and Finland. The chapter ends with a summary that discusses and reflects the influence of EU projects on its member states and their policies.

2. What is an "EU project"?

In both academic debates and policy-making, EU projects are generally understood to be wider than the definition that is found in project management manuals (e.g. PMBoK, Prince2, PM²). When the term 'EU project' is used, it can refer to various forms of activities, which are not necessarily defined as projects in the strictest sense. Godenhjelm (2016:36) even claims that the funding principles of the EU reinforce "the inclination to define almost all reform activities as projects" (see also Andersson, 2009). Although PM² methodology, an official EU methodology, defines a project as 'a temporary organisational structure set up to create a unique product or service (output) within certain constraints such as time, cost, and quality' (European Commission, Directorate-General for Informatics, 2021, p.5), other formats such as grants, co-financing initiatives and collaborations are also commonly referred to as *projects*. This means that not only do project practices in the EU apply to typical projects (defined in accordance with strict project methodologies), but also to quasi project activities. Consequently, any action can become an "EU project". Therefore, it is important to recognise that an "EU project" is more than just a delimited project, it is a form of governance within the wider goal of social cohesion in and between EU member states.

2.1. *Governance in the EU - the role of EU projects*

From a governance perspective, EU projects can be seen as one of the European Commissions' main policy instruments to implement policies in areas where the EU has little or no formal jurisdiction, including social inclusion, regional development, and culture. Policy instruments are often divided into two categories, (1) hard policy instruments, including legal or regulatory instruments and fiscal instruments (including funding), and (2) soft policy instruments, such as information, knowledge production and organisation (including stipulating specific forms of managing and evaluating projects) (Carlsson & Mukhtar-Landgren 2019). EU projects and project funding can be seen a way to create local incentives to implement EU policies, while also using competition (for project funding) to increase the quality of services (Carlsson et al 2022; Mukhtar-Landgren & Fred 2018; Bruno, Jacquot, and Mandin 2006). But EU projects can also be seen as to dictate the organizational form of its implementation (partnerships and projects).

EU projects are closely associated with the 'partnership principle', which has been a core feature of policy making in the EU since the late 1980s (Bache 2010; von Bergmann-Winberg, 2010). As mentioned above, EU projects are perhaps

primarily associated with EU cohesion policy. Cohesion Policy, and the funds it has at its disposal, has been described as the core of the EU multilevel network-based system (Rhodes, 1996; Bache and Chapman 2009). A core legitimising practice is that the funds are implemented through partnerships at different governmental levels in all member states. The basis of the partnership principle is that implementation should involve the most important actors in the regional development of EU member states (Bache, 2008; Demidov, 2016; Potluka & Liddle, 2014). As a result, one of the core features of the Cohesion Policy is the emphasis on networks, local implementation and partnerships. In other words - projects become delimited and manageable policy instruments and tools for implementing soft policies in a multilevel and collaborative way. Even though each fund is different in content and scope, there is a logic and an established implementation structure of project financing that transgresses the different policy fields (Büttner and Leopold 2016, 49), meaning that EU projects are key configurations, or even core features, of multilevel governance (Mukhtar-Landgren & Fred 2018).

This multilevel, partnership-based structure has been problematised in political science debates on democracy. Studies of structural funds have dealt with issues including the uneven distribution of power and influence over the resources of the funds - especially concerning the increased presence of experts and increasing technocratisation (see e.g. Davies 2007: 780; Olsson, 2003: 292). Other studies have raised questions about transparency in structural fund work. On the one hand, collaborative endeavours at all levels are open to actors from several sectors. On the other hand, the network-based form raises challenges related to transparency and responsibility (who did what and why?), meaning that issues of accountability and the distribution of power and influence are difficult to clarify and can even be hidden (Carlsson et al 2022; Hall et al 2009). Beyond the wider consequences of democratic participation and accountability, the implementation of EU Cohesion Policy through project-based partnerships has had several effects on member states. These effects will be discussed below.

3. The micro, meso and macro levels of EU projectification

EU projectification can be regarded as a phenomenon that both connects activities, resources and actors and also generates different kinds of changes at several levels (Jałocha, 2018; Jacobsson and Jałocha, 2018). In this section we start out at the macro level and work our way through the meso and micro levels to illustrate the multi-layered phenomena of EU projectification.

3.1. *The macro level*

The EU is a major source of project activities and has approximately 350 funds and programmes funding project initiatives around Europe. More than 60% of the

entire EU budget is managed through different project funding systems (Büttner & Leopold, 2016). The funds are divided into 5–7-year programming cycles with specific focus areas that generate different calls-for-projects. These are focus areas and call-for-project proposals to which all member states have to adapt in order to receive funding (Jałocha, 2021). However, this has not always been the case. One of the first EU funds - the European Social Fund - started out with a retroactive approach compensating already existing projects, and the commission then "acted as a banker, reimbursing Member States for half of the training costs involved in getting people back into employment" (Brine, 2002:29). However, through a series of reforms in the 1970s and 1980s (Büttner & Leopold, 2016:11) we saw a shift from retroactive spending to the support of programme financing, the introduction of the partnership principle and the signing of the Single European Act. Parts of this development have been discussed in the literature on *europeanization* (Börzel & Risse, 2000) - a concept that aims to to capture the homogenisation of the member states and their policy focus and policy processes (Olsen, 2002). However, this development of corresponding programming periods and standardisation, as well as processes of homogenisation, presupposes an adjustment, or an alignment, to the principles of EU projects. The move away from retroactive reimbursement towards project funding systems with programming periods - including the construction of application procedures and administrative routines for documentation and evaluation - are all consequential constructs of the EU project. These are consequences that impact the organisation of the EU as well as the member states and their sub-national governments and organisations. In order to align with EU project funding systems, each member state has to create national and/or regional organisational entities/bodies responsible for the management and implementation of the different funds - all in accordance with the partnership principle. The organisation of these entities/bodies differs from member state to member state. In Poland, for instance, there is a ministry whose main objective is to manage and implement EU programmes. In Spain, the funds have been organised according to already existing regions and regional bodies, whereas Sweden chose to create new regions and new organisational bodies (Carlsson, 2019). Despite differences, each of these cases illustrate how the possibility of EU funding and EU projects impact the member states.

Countrywide projectified identity is also shaped around EU co-funded project myths. These projects are a kind of mimetic organisational story about project success that is worth repeating, recreating, and can be achieved. In Poland, EURO 2012 was a legendary example of these project myths. This project showed that the whole country was capable of mobilising and temporarily projectifying public bodies in order to hold an intricate and complex event. For many other European countries, large cultural events, such as the European Capital of Culture, create mythical stories about EU project success (See Wåhlin, Kapsali, Näsholm and Blomquist, 2016).

However, EU projectification does not only have an impact on the overall management styles and organisational set-ups in the member states, but also on policy content. As the Cohesion Policy targets policy areas such as sustainability, integration and unemployment, these areas also become targets for projectification. This includes new ways of wording and framing policy problems where issues related to education, for instance, are translated into "life-long learning" and problems of inequality talked about in terms of "social exclusion" (cf. Mukhtar-Landgren & Fred 2018). Munck af Rosenschöld (2019), and Godenhjelm (2015), both describe how EU projects are used in Finland to handle environmental policy and sustainability issues. McGlinn (2018) describes the policy area of Swedish unemployment as a field strongly influenced by EU projects and Wåhlin (et al., 2016) shows how cultural policies around Europe are implemented through the European Capital of Culture programme. These are all broad policy fields that involve a great variety of projects that influence organisations, institutions and citizens in the member states and could, therefore, potentially generate major transformations. More critical literature describes the increasing reliance on projects in policy areas such as unemployment, integration and sustainability as 'short-term solutions to long-term problems' (Abrahamsson and Agevall, 2010; Öjehag-Pettersson, 2017; Mukhtar-Landgren & Fred, 2018).

3.2. *The meso level*

At a meso level, EU projectification entails both a proliferation of local and regional EU projects across Europe and the transformation and adaptation of organisations and their environment. The proliferation of EU projects is sometimes referred to as the mushrooming of projects and is facilitated, among other things, via the notion of *best practices* - a common phenomenon within the EU. A best practice is a project considered to be successful in some form of "proven" way and meant to be distributed to other contexts around the EU (via conferences, award ceremonies, webpages and social media outlets). Through these best practices, project ideas travel all over the EU, and organisational and funding requirements have already been "solved" or set up, ready to be used elsewhere. An interesting feature of the mimetic mechanisms found at the meso level is that very different types of organisations become similar as they adapt to EU project requirements. Universities, hospitals, offices and private companies often build units within their structures whose main task is to acquire and manage projects financed by the EU. This similarity between organisations also facilitates the transfer of best practices and project ideas. As such, EU projectification entails different kinds of changes in organisational structures, strategic management processes, and methods of working. To exemplify, Fred (2019) found in his study of Swedish local government, that municipalities sometimes have parts of their organisation (a

specific policy field or department/unit) rely solely on projects or project funding systems in which projects take the place of the former "permanent" structures of the organisation. This type of transformation in one part of the organization also often entails a necessary adaptation of other parts of the organisation. Midler (1995) found the same in his studies of Renaults' transformation from a traditional car manufacturer to an organisation based on autonomous project teams. Their transformation called for adaptation in the organizations' environment and supply networks. Taking an entire policy area of the EU as an example, one can observe how unemployment policies around the EU have transformed public as well as private organisations in the member states as a result of EU projectification and how these changes also encouraged (and sometimes forced) related organizations to adapt to these changes (See McGlinn, 2018). In order to handle EU projects, organisations train their staff in EU project management, they hire EU strategists, create their own project models or buy an off-the-shelf version. Administrators change their routines to accommodate future EU applications and projects, and the organisations slowly but surely become fluent in EU concepts, processes and ideas (Fred, 2018) Today we find numerous actors supporting the engagement in EU projects, including EU offices, EU specialists and EU strategists as well as EU project offices within or between public organisations. These are actors devoted to the dissemination of EU funding opportunities and actors keen on finding ways to match EU funding with actors who could be interested in getting involved in EU projects, and who therefore act as facilitators of EU projectificaiton (Fred & Mukhtar-Landgren, 2019).

3.3. *The micro level*

At a micro level, we can see new professional roles and the emergence of the public project manager which, in many respects, can be related to the EU. Over the last 30 years we have seen an increasing demand, not least within the public sector, for project managers or people with project management skills. In the mid 1980s, project management was just an added extra in recruitment situations, but by the end of 2010, it was "perceived as a natural element in organizing governmental work" (Löfgren & Poulsen, 2013:75). Within the context of EU projects and the public sector, we often come across people who could be called project champions. These are committed individuals working hard to reach specific goals. They are experts in acquiring funding and coordinating support for their idea or solution to a specific problem: their project! In wider political science literature, these individuals are conceptualised as policy entrepreneurs (see Kingdon, 2011) or insider activists (Olsson & Hysing, 2012). In terms of EU projectification, these entrepreneurial activists are important actors in the dissemination and promotion of EU funding opportunities. However, these champions are not alone. There

is also, as illustrated above, an emerging group of civil servants around Europe who are increasingly becoming skilled in project management. Through training, also offered as part of EU support in many countries, public sector staff can improve their project qualifications. In the words of Kovách and Kučerová (2009), these individuals can be seen as part of a larger societal development – the rise of a "project class". The emphasis on projects and the demand for local expertise and managerial skills strengthen the legitimisation of the project class, thus "making it not only a class of experts, but also a managerial category that is part of the implementation of project programmes" (Kovách & Kučerová, 2006:4, See also; Fred & Mukhtar-Landgren, 2019). Since this project class often has an intermediary role between decision makers and beneficiaries, their expertise could also allow them to influence the allocation of funding.

Many EU projects are quite small in terms of economic resources, so most people are involved only part time in EU projects. In some cases, people's full-time employment is built around several projects, and for people in the earlier stages of their career, EU projects can be a way into the labor market. However, these (often short term) contracts sometimes result in difficulties obtaining a more permanent employment. In Sweden, for instance, an employment normally becomes permanent after two years due to the Swedish employment act (1982:80). However, by tying a person to one or several projects, the employer can "avoid" permanent employment but still keep the employee for more than two years. The consequences of EU projectification at an individual (micro) level can, therefore, be long-lasting short-term employment.

On a more general note, research (Jałocha, 2021) also indicates that (EU-) projectification could lead to issues related to work-life balance among public sector employees. In some countries (e.g. Poland), overtime is an unwritten rule when undertaking project work in public organisations. Employees are expected to be available and ready to start work outside standard working hours, outside the regular workplace and work remotely. It is quite common for personal projectification to also be reinforced by wearable devices (employees, outside of working hours, can e.g. receive regular information on project progress on their smartwatches) (Jałocha, 2021).

4. Conclusions

As shown in the analysis above, the EU project logic affect not only how EU policies take shape and are implemented (cf. Büttner and Leopold 2016), but also wider institutional and organisational developments in the member states, including the emergence of new roles (Stephenson 2013: 828), and new ways of conceptualising policy. Even though EU projects are dependent on the willingness and active participation of national and subnational actors, the intended

and unintended consequences of project funding go beyond the specific aims of delimited projects, as projectification unfolds in various ways at different levels. In terms of management, projects are perceived as a tool that brings flexibility to the organisation but also control, which renders them highly attractive and a suitable instrument for public sector reform. Even though the distinction between the micro, meso and macro levels is purely analytical, we can observe developments and effects over time at all levels.

Each EU project can be viewed as a small part of a larger process of EU projectification where changes in temporalities may work as an illustrative example of consequences of projectification. As project funding bodies, such as the EU funds and programmes, strongly encourage public-private partnerships, collaboration and networks, they simultaneously push the member states (and their subnational actors) to align policy processes and organisations to programming periods, calls for projects and funding and implementation cycles of 1-3 years. To engage in EU projects is, as such, also to sign up for changes beyond the specific project in the projects' environment that harmonize with the EU project logic. Another example of this is the linear time conception that characterises EU projects (with a clear beginning and end - time is limited) and that is counter to the circular time conception of ordinary public sector organizations that is based more on continuity, repetition and routine. This "short-termism" - introducing temporary forms of organization as a pivotal policy tool - is built into the very essence of EU projects and could very well affect the capacities for long-term planning at national and sub-national levels (see, Sjöblom, 2009). Several studies have problematised the usage of (temporary) EU projects to handle long-lasting challenges such as unemployment and social exclusion or issues related to sustainability (see e.g. Munck af Rosenschöld 2019; Brorström 2019). Although it might be fairly easy to measure the direct output of an EU project, its long-term outcomes are more difficult to assess and evaluate.

Beyond temporalities, the range of activities surrounding projects also affects EU member states. These activities include best practices, tools for evaluation and impact assessment and ways of forming and organising partnerships. These tools have also spread to member states, including local governments, which have adopted similar tools in their own organisations. National organisations simply adopt the project form in the implementation of national policies, and in addition, both national agencies and local governments build up their internal capacity to work with projects, including adopting new tools and routines that are mimicked in other parts of the organisation. Here, studies have shown that the implementation of EU projects does not only involve developing new competencies for civil servants at all levels, but also new actors, roles and new forms of expertise and professions - ranging from expertise in terms of applying, leading and evaluating projects to consultancy firms specialising in aiding municipalities in these endeavours (Fred & Mukhtar-Landgren 2019).

Finally, projectification can also be seen in terms of policy content. To date, project funding has permeated the management of large, widely defined policy areas spanning from integration, social cohesion, culture, research, environmental issues and unemployment to innovation and regional development. In previous research, we have described this in terms of re-compartmentalisation - which is a process in which member states re-frame their policies to fit EU funding opportunities (Mukhtar-Landgren & Fred 2018). This includes speaking of "lifelong learning" instead of education, and "social exclusion" instead of inequality. This is particularly evident in policy areas which are heavily projectified in terms of both dependence on EU funding and mimicking the project format in national policy making. One example of this is long-term unemployment (Dahlstedt 2009), and the integration of immigrants (McGlinn 2018).

Taken together, development at macro, meso and micro levels can be said to have led to the development of an EU 'project world' - a large ecosystem with many organisations, individuals, agents and whole "project classes" (Kovách & Kučerová, 2006; Mukhtar-Landgren & Fred, 2018). Therefore, projects permeate all aspects of policy making from policy content to the temporalities of politics and development ventures. Even though there are on-going debates on EU policies in terms of their political content and goals, the implementation of policies using projects has not been discussed or questioned in an EU context. Instead, there is a tendency to see the project form as neutral or even apolitical. With some exceptions (e.g. Abrahamsson and Angevall, 2010; Öjehag-Pettersson, 2017) the logic of project work in the EU, and the implementation of development and cohesion policies by using projects is neither questioned nor denied. If anything, it is perceived as a positive change, a characteristic of the modern way of governing a supranational organisation. On the other hand, research conducted within management sciences and project studies is increasingly addressing the negative consequences of projects, such as chronic stress, work overload and burnout among project workers and shows the "dark side" of projectification (e.g. corruption, sexism, money laundering, modern slavery) (Hodgson & Cicmil, 2006; Aguilar Velasco & Wald, 2022; Locatelli, Konstantinou, Geraldi, & Sainati, 2022). In relation to more institutional and organisational aspects, projectification has been problematised in terms of transparency, inclusion in networks/partnerships, as well as the inequalities in regard to resources and skills when trying to obtain project funding. Therefore, it is necessary to go beyond the tendency to depoliticise the usage of projects as a neutral tool and open up to wider debates on the politics of projects.

5. The paths forward

Reflecting on future paths for research on EU projectification, it should be noted that despite the fact that scientific interest in this issue has been relatively

recent, we are becoming increasingly aware of this phenomenon and its consequences. Numerous works are currently being developed (Büttner & Leopold, 2016; Büttner, 2019; Godenhjelm, Lundin, & Sjöblom, 2015; Jałocha, 2019; Mukhtar-Landgren & Fred, 2018), and they will allow us to better understand what characterises EU projectification processes. At the same time, the concentration of research around issues regarding the nature of EU projects and their governance could raise some concern. Does the homogeneity of topics and the convergence of opinions lead to "academic drift"? Two steps can be taken to avoid this. First, it is important to address new research problems. Second, the implementation of interdisciplinary and transdisciplinary research is necessary. Currently, interdisciplinary dialogue is indiscernible in research on EU projectification. Scholars from different scientific fields who are interested in both EU and projectification issues rarely publish joint texts or conduct joint research. The combination of different ontological and epistemological perspectives could make our research on EU projectification deeper and open up new research fields.

Moreover, as our considerations have shown, the use of EU projects as a method for implementing public policies and as a method for managing organisations are ambivalent. Perhaps it is the universality and scalability of projects as a method that make them so attractive - on the one hand, these characteristics allow very complex goals at a European community level to be implemented, and , on the other hand- micro changes to be implemented in local communities. We know that projects are not "innocent" and have a "dark side", so should we consider whether other forms of cooperation could replace them? Would it be possible to build and manage the European community without projects or with a limited number of projects? What other participatory format could replace EU projects? The question that, in our opinion, is worth asking in the future is whether deprojectification is possible in the European community, and, if not, how the negative impact of EU projectification could be reduced and its positive impact strengthened.

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CHAPTER 6

Determinants of the Negative Aspects of Projectification

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Abstract

Projectification generally has constructive implications and is deemed to be innovative and progressive strategy for achieving business goals efficiently; yet, numerous project team members suffer from stress, work overload, and fatigue. This chapter seeks to investigate the determinants of the negative aspects of projectification and their effects on various levels. A review of the literature was performed to scan the limitations of projectification and their implications on project workers. It is established that projectification has drawbacks on multi-levels including society, organizations, projects, and individuals which will be examined in this chapter.

Keywords: Projectification; Personnel, Well-being, Negative aspects, Disadvantages.

1. Introduction

The concept of projectification is largely described as the institutionalization of projects in society. Earlier in 1995, Christophe Midler created this term by delivering an arresting examination of organizational projectification in his study on Renault (Midler, 1995). With time, the level of examination and scope of study on this subject has expanded and research nowadays surpasses the projectification of industrial companies and the project management domain where the notice initially began (Jensen et al., 2016). Along with this increasing concern, the enablers, and consequences of projectification on various levels and industry has become clear. Following this development, it has been argued that the notion of projectification deserves more attention.

In recent years, the definition of projectification has evolved and it has now been described as the expanded usage of projects and its "destabilizing consequenc-

es on perpetual logics of the company including task classifications, hierarchical regulations, and relationships with suppliers" (Schoper et al., 2018).

Projectification has implications for the financial system of the company and society as it pushes workers to incorporate project work, manage their private lives as a project, and position themselves and others as projects (Henning and Wald, 2019).

Organizations utilize projects to organize the work aiming to improve organizational performance, and image (Lloyd-Walker et al., 2018). The boost in projectification has resulted in a substantial need for extremely experienced, knowledgeable, and competent employees (Yang et al., 2017). Individuals need to be extremely agile, flexible, and well-organized as projectification entails tight deadlines, elevated workload, variety of tasks, and massive pressure on personnel (Henning and Wald, 2019). The above might pose risks to the health and well-being of the employees leading to counterproductive namely unhappiness, nervousness, dissatisfaction, and therefore turnover among other negative effects (Schoper et al., 2018).

2. Projectification and Project Workers

As presented earlier, projectification denotes a shift from monotonous action to working on unique projects, therefore, it requires continuous communication among parties and the readiness to work overtime, in matrix structures, frequently sacrificing work-life stability. Irrespective of the company or location, individuals experience comparable negative implications of projectification. Thus, the adverse effects of projectification on deprived or susceptible groups, such as patients, immigrants, or precarious workers, are highlighted in many studies (Henning and Wald, 2019, Schoper et al., 2018, Yang et al., 2017). Therefore, viewing projectification effect on human stands in plain contrast to its recognized advantages on the managerial level that demonstrates the positive influence of project work on corporations.

Focusing on the negative consequences of projectification, previous studies mainly concentrated on inequality, career insecurity, and unemployment (Sage, 2016). Söderlund & Bredin (2011) identified the risk of re-bureaucratization, neglecting the need for integration of projects into programs or portfolios, limited time for knowledge development, overwhelming deadline stress, and lack of trust as the main drawbacks of projectification.

Jerbrant (2014) stressed that projectification is certainly driven by apparent implications, in the sense that each subsequent restructuring resolves some difficulties but generates new problems.

Based on the above, there are four primary categories of factors that are leading to negative aspects of projectification on individuals: environmental factors, organizational factors, project factors, and individual factors which will be examined in detail in the below subsections.

2.1. *Environmental Factors*

These include societal-level aspects that influence the organization and its workforces, for example, the culture, socioeconomic differences, legal and political systems, and formal and informal institutions (Jalocha, 2019). Societal-level factors have a significant role in determining policies and procedures.

Previous authors considered projectification as the outcome of several types of mechanisms at the workplace that endlessly challenges the organization (Lundin, 2016). Influences outside the workplace such as work–family conflicts likewise impact project workforces' well-being (Lundin, 2016) and make them at a higher risk of burnout (Singh et al., 2012). Adding to the above, industry characteristics are other factors affecting the impact of projectification on individuals. For example, the construction industry is a high-risk industry, and the work of construction project managers is often highly stressful, due to time pressures, uncertainties, and the dynamic social structure involved in construction projects. Previous studies demonstrated that work objective stress reduces the task performance of construction managers, and that interpersonal performance is maximized with a moderate level of objective stress.

Moreover, projectification break the family-work balance as it requires long working hours, flexibility, and availability. However, family and friends and other non-work-related support are very significant in alleviating psychological strain. Love and Edwards (2005) examined the predictive capabilities of the full job strain model for construction project managers to assess employees' psychological well-being in terms of worker health and job satisfaction. Their findings revealed that social support (family and friends) have significant effects on psychological well-being, and that non-work-related support is more significant than work support in alleviating psychological strain.

All the above confirm Lundin (2016) results that the expansion of project work is resulting in more job opportunities, yet success is related to permanently being available and flexible. Individuals are starting to sacrifice their long-life plans and social predictability to finish their tasks, indicating that projectification is affecting not only the way employees work but also how they live their private lives (Lindgren and Packendorff, 2006).

2.2. *Organizational factors*

These have to do with the organizational context of projects that impact management practices and workers. For example, a career-developing environment, poor organizational structure, and role dualities affect both psychological stress and the performance of the employees (Naoum et al., 2018). Likewise, work environments can produce emotions such as anger in attaining desired outcomes. Lindebaum and Fielden (2011) suggested that negative leader emotions influence a variety of negative follower outcomes.

Adding to the above, many organizations are using budget behavior control systems based on the rhetoric of professionalization by promoting entrepreneurial-like commitment behaviors such as self-discipline, self-directed, self-motivating, self-realization, and self-exploitation (Legault and Chasserio, 2012). However, despite the claims of autonomy and self-determination at the work of creative experts, managers set up fairly tight controls through the management and the rhetoric of professionalism. The client's position of strength overrides the employer's direct control, transferring a major share of the risk inherent in PM to the other employees. Ensuing long hours of unplanned and unpaid overtime is the most important obstacle facing the workforce in projectified companies and affects employee satisfaction. Moreover, firms are extracting long hours from employees by imparting in workers a deep sense of individual commitment to the aims and values of the company and a sense of self-sufficiency over their careers and lives (Gaim et al., 2019), However, experts do not benefit of the extreme job autonomy instead they prioritize work over their health (Asquin et al., 2010).

Based on the above, within the organizational factors category, there is a bunch of sub-categories that might be identified namely organizational structure and climate (e.g., complexities, ethical dilemmas), organizational culture (e.g., parallel cultures), and control mechanisms (e.g., discursive practices).

Apart from the above, human resources management (HRM) practices, contracts, and benefits are as well reasons for depression and anxiety if not well addressed. For example, employees who are not satisfied with their firm's HRM practices and job rewards/punishment have lower job satisfaction. Likewise, employees with short-term contracts have increase odd for depression and anxiety (Aguilar Velasco and Wald, 2022).

Organizational stressors impact projects and employees. There is empirical support for paradoxical tensions and practices (Gaim et al., 2019), competing organizational logics and resources constraints (Arvidsson, 2009), bureaucracy, and different views of decision-makers (Ng et al., 2005) that do not consider employees' well-being as major contextual roots of psychological distress in project work. Therefore, one factor that contributes to negative individual projectification is the technocratization of organizing. In projectified organizations, individuals become immersed in the process and lose their ability to challenge it or engage in a debate over their situation. Cicmil et al. (2016) suggested that project discourses may have more far-reaching existential consequences for project workers and may create conditions that are hard to cope with, hard to justify, and hard to control.

The literature has dedicated a lot of attention to the negative consequences on individuals. Ekstedt (2009) wrote that, because of this trend, the risk (e.g., concerning the revenues gained) may be transferred from companies to individuals.

2.3. *Project factors*

These factors comprise project-related features affecting project members' work results and well-being (Darling and Whitty, 2020). Among these factors, job demand and job resource issues top the list.

The shortage of opportunities for recuperation, inadequate routines, limited time resources, and many concurrent projects lead to psychological stress reactions, decreased competence development, and deviations from the schedule (Chang et al., 2013). Similarly, the study of Singh et al. (2012) on software developers facing additional role ambiguity, role conflict, schedule pressure, irregular shifts, group noncooperation, psychological contract violation, and work–family conflict showed that they are at a greater risk of job burnout. Members are prone to job burnout as they do multiple projects and therefore must cope with tough deadlines, long working hours, and customers changing their expectations. Besides, workers are subject to monotonous and repetitive tasks, team conflicts, nervousness over the sheer competition, worry about superior motivation and ambition, and family expectations. All these factors can lead to high job burnout.

Adding to the above, teamwork issues (e.g., conflicts, and turnovers) is another important determinant. Project managers' behaviors and leadership styles can influence on turnover intention of the project workers. The leadership style has a substantial impact on supporting workers' well-being and organizational performance. Previously investigators have demonstrated meaningful relationships among leadership behavior, employee well-being, and organizational outcomes such as contemporary leadership, job satisfaction, organizational commitment, and turnover intention. Therefore, managers should try to build robust, enthusiastic collective job situation and focus more on employee satisfaction as well as leadership styles to reduce turnovers.

Notwithstanding the above, the project culture is another project factor. A strong culture based on an acceptance of ambiguity (e.g., in roles, power relations, organizational routines, and practices) can promote the development of a loyal, committed, effective workforce and sustain a fluid and flexible form of the project working overtime. Critically, ambiguity allows individuals to sustain multiple identities as both 'expert' and 'consultant' (Chawl et al., 2018).

Investigators in this category highlighted project stressors that impact project members and found that individuals with potential conflicts of interest, difficult personalities, deadlines, managing people of different disciplines, and emotional dissonance generate conditions that are hard to deal with, explain and manage (Cicmil et al., 2016).

2.4. *Individual factors*

These factors relate to personnel characteristics and psychological aspects that affect the improvement of job strain responses such as better satisfaction under the effect of elevated job demands (Caniëls, et al., 2012).

Among these factors, demographic characteristics top the list. Organizational and professional commitment has dual effects on the firm's performance: complementary effect and conflicting effect. The impacts of these commitments on job satisfaction, job performance, and job problems are particularly important in a work setting. The study of Chawla et al. (2018) in a bureaucratic work environment implied that organizational commitment has a substantial and immediate impact on job satisfaction and job performance and a considerable reverse influence on job problems. Improved satisfaction, and improved performance, but also increased problems with the managers were correlated with longer tenure in the organization (Chawla et al., 2018).

Adding to the above, human capital (employees knowing their trade/skills) and social capital (employees knowing one another/relationships) were found to be critical for project-based career progress. In this sense, human and social capital form a self-reinforcing cycle of career competencies that propel a person through successive projects. Therefore, personal resources, and personality traits as well as emotional states were also noticed to be key determinants.

Weiss (1983) examined organizational stress amongst managers, resulting symptoms of strain, and whether social support can reduce symptoms of strain. His results showed that job stresses are certainly related to psychological and physiological strains. Also, his findings highlighted that Type A personality has a substantial negative relationship with both psychological and physiological strain among project workers.

In a similar study, Berg and Karlsen (2013) found that positive self-talk, visualization, clear goals, feedback, empowerment, and resilience are valuable and effective tools that help in reducing and coping with work stresses. Also, Lindgren et al. (2014) examined the emotional processes associated with the project management discourse and found that discourse is invoked in ways that make people internalize emotional states related to chaos and anxiety while ascribing feelings of certainty and confidence to external organizational norms and procedures.

The most frequently studied topics in this category are work motivation, gender differences/challenges, and coping strategies. Previous studies in this category investigated not only the individual factors but also various combinations of personality characteristics, emotions, and insights into job and company processes that trigger individuals to respond differently to stressors. For instance, gender inequality or injustice impacts the emotional states and behavioral responses of the employees and affects their engagement (Chaudhry et al., 2020). Empirical evi-

dence shows that factors such as employees' age and level of education are critical in affecting how individuals cope with stress (Haynes and Love, 2004) and lack or mismatch of competency might cause project overload and distress (Chaudhry et al., 2020; Gustavsson, 2016; Cerne, and Jansson, 2019).

3. A multi-level Examination of the negative aspects of projectification

In this section, we will integrate the primary components and respective sub-categories to capture the examined determinants of the negative aspects of project work and their effects on people. Contrary to the previous section where the focus of the determinants has been at the individual level, the literature has identified the determinants of negative aspects at different levels. Consequently, this section will focus on different interrelated levels to examine the determinants.: macro (environmental/societal/country/industry), meso (organization and project), and micro (individuals). Additionally, we will end the section by emphasizing the possible mediators that may affect the relations between the undesirable attributes of projectification and individual consequences.

3.1. *Micro Level*

At this level, we focus on people differences, for example, demographic differences, abilities and capabilities, individual resources, and managing orientation, that impact the way employees operate and deal with the unfavorable effect of project stressors (Jerbrant, 2014). Females, for instance, encounter more emotional fatigue than their male colleagues. Likewise, individual traits shape how expertise and competencies are employed in a scenario, the approach employees react to teamwork, and job fatigue indicators (Chang et al., 2013). Motivation considerations such as rewards might also impact the productivity of the workers.

Apart from the company policies, individuals who aim for a project career are generally very dedicated and eager to self-sacrifice; they willingly participate in project work on a routine basis as these people cannot imagine doing something else (Cicmil et al., 2016). Nevertheless, all employees are exposed to stressful working situations, which can aggravate work-related results, health, and well-being in the long term.

3.2. *Meso Level*

At this level, organizational factors affect the project and its members. For example, matrix organizations push workers to navigate between functional units and projects and expect superior performance in both (Dube, 2014). In such vibrant and dense structural environments, variations in the project due to ambiguity may arise, internal politics (e.g., hidden agendas, biased plans) may occur and project

members' motivation and efficiency may decrease. These dynamics get more complex with continual modifications, impractical deadlines, and intense pressures (Cerne, and Jansson, 2019).

Furthermore, workers could face ethical problems such as gender differences and dishonesty (Kvalnes, 2014). The governance structure affects how workers face and react to such problems. Unfavorable circumstances such as miscommunication, adversely influence employees' engagement and motivation (Mysore et al., 2021) and employee productivity (Samimi and Sydow, 2021). Furthermore, a "perfect projectified corporation" has a particular managing culture communicated in the encouragement of employees, teamwork, continuous improvement, and client and employee orientation (Chaudhry et al., 2020). In a such pressuring work setting, executives are frequently compelled to "do more with less"; which results in abusive supervision behaviors that destructively impact project members' well-being and cause a turnover.

Additionally, the normalization of temporary work generates new employment relationships and alternates in the design of human resource management processes and voice behaviors (Prouska and Kapsali, 2021). In project-based organizations, HRM practices are the domain of the project manager rather than either line managers or the HRM department (Keegan et al., 2012).

Job needs, job resources, teamwork problems, managers' leadership style, and project culture are facets of projectification that can grow into stressors depending on personal traits and personal resources. Furthermore, projects can have paradoxical demands due to the increased need for effectiveness and flexibility to cope with the complicated and developing environment (Havermans et al., 2019). Even if the skills, flexibility, and knowledge are available, PMs might face difficulties to meet project outcomes as they have occasionally to manage impractical deadlines, and resource limitations. An extreme workload is partly owing to parallel tasks that require deep prioritization along with inadequate, lack of resources, loss of control, lack of feedback, absence of continuous improvement, and continuous shifts from one project to another, which necessitates social connections with numerous stakeholders (Patanakul et al., 2016). Such situations create project overload, which is associated with stress reactions, poor job performance, and illness (Weiss, 1983; Zika-Viktorsson et al., 2016; Brathen et al., 2021). Thus, project work exposes project members to threats of extreme commitment and dedication, and the deterioration of members' personalities ((Havermans et al., 2019). Managers' behaviors might as well destructively affect the project outcomes of subordinates. For instance, managers might enforce compound stresses on project members, causing high-stress levels, and might emotionally affect the natural setting of the project to their benefit.

Besides, project culture can be utilized by managers to initiate employees' citizenship behaviors, which in turn leads to more accomplishments (Aronson and

Lechler, 2009). Though, in project work with long working schedules, mandating citizenship behavior can trigger job burnout and cause depression (Caniëls, et al., 2012).

The above negative effects at the meso level emphasize the significance of proper job design and protected psychological workplace culture to guarantee adequate care of workers.

3.3. *Macro Level*

The environmental factors, which consist of macro-level factors such as socio-economic, political, institutional, and cultural context, influence all other factors at all levels. At this level organizations normalize, organize, and encourage the dissemination of a "projectified" work-life that incorporates the segregation of labor (Samimi and Sydow, 2021).

Within this context, projectification is viewed as a philosophical issue, or as a metaphysical shift in the perception of time and work, where the project semantics sneaks into our daily dictionary, society, and daily routine.

Hence, projectification, at this level, is a socially altering phenomenon with complicated outcomes. The evolving limitations of projectification are portrayed using a philosophical viewpoint. It is worth mentioning that the task-based method of employing projectification is not simply an organizational form, yet it defines the approaches to shaping cooperation and social relations (Jensen, 2012). Therefore, fundamental variables such as time and space have varied and affected both companies and individuals.

Moreover, several scientists have underscored that the existence of the project work environment is a threatening dystopia where everything is projectified.

4. Potential Mediators

The attractiveness of projectification with its foreshadowed successful outcomes and efficacy in achieving business goals in comparison to customary approaches has led to widespread adoption of this phenomenon in the last three decades across many sectors of society. Organizations working in sectors alien to projects such as health management, social work, development, banking, or manufacturing are embracing this trend and even setting-up project management offices indicating their long-term commitment to projectification. Yet the last three decades of embracing projectification have brought about subtle negative consequences as discussed in the previous sections and showed that projectification is not all panacea.

Probably the most noticeable negative impact of projectification is its impact on individuals. While focusing on completing the project scope with a certain deadline and budget, came at the expense of the project team. Employees are expected to do

sacrifices. Working long hours under stress because of impending deadlines some-times without getting overtime compensation, accepting short-term employment for the duration of the project, work instability are standard practices in people working projects. All of this has come at high cost that is leading to serious issues ranging from health problems to work-life balance disruption and families' fragmentation.

Revisiting how we execute projects while considering the well-being of the individuals is now deemed necessary if projectification is to stay. This effort has already started by project management societies and one can see there is increase focus on the people. The seventh and latest edition of the PMI PMBOK has attempted to draw the attention to the people. We started seeing terms such as self-autonomy or self-governing teams among others that foster the individual im-portant role. Nevertheless, these efforts remain shy of dealing with real problems.

The potential mediators to mitigate the negative impacts of projectification on the individual must explore new approaches in three main contexts 1) Job design, 2) Contracts and 3) Knowledge management.

The first and most important context is job design. Job design must take into consideration if not prioritize the well-being of project members. Project man-agement has long established the three main goals of projects as scope, time, and cost, and job design or project plans were developed merely to achieve these goals. These goals must now include the well-being of project members if not explicitly them implicitly. In order to achieve that, human resources policies must be estab-lished that ensure that the atypical practices in project work—such as 12 hours workday—do not get normalized. In matrix or mixed organizations, such human resource management policies usually exist but then it is not applicable to project teams because of the "urgent" nature of the project. Such policies must be based on the voice of the project team members and can incorporate a cap on the working hours, a cap on the allowable overload, guaranteed rest days per working period, paid overtime, proper selection, and assignment. Once policies are established and circulated, project managers and team members must be followed in job design or project plans. Project management techniques include an array of tools that can be utilized such as resource leveling, or buffers in critical chains.

Contracts in project management is another context where improvement can be made. Many organizations intentionally or unintentionally have used the pro-ject employee contracts as a legitimate tool to "abuse" the employee. These contacts must be redrafted to take into account the basic rights of the employee. Usually, these contracts are drafted in the project world for the advantage of the project solely while many due rights and benefits are overlooked owing to temporary nature of the project. Besides ensuring the rights and benefits, the terms of these contracts should consider ways to offset the work instability.

The third context is knowledge management. Improvement in this context would ultimately benefit the individual and the organization both at the short

term and long term. Continuous training and professional development of the project members is proven to be effective in improving employee satisfaction. Employees and knowledge retention is critical to the sustainable business success. This important area has long been neglected in the project world again due to the temporary nature of projects.

Improvements to mitigate the negative impacts of projectification on the individual can be made also to many other contexts but once the improvements are made to job design, contracts, and knowledge management contexts, one can build on the results of these changes.

5. Conclusions

This chapter presented a comprehensive systematic literature review and integrated the different determinants of the negative aspects of projectification and their effects on individuals in a multi-level analysis.

The examination of the literature showed that the level of analysis has grown from a case where projectification was solely acknowledged as a structural trajectory in organizational restructuring, toward viewing it as a fundamentally socially changing phenomenon with complex consequences. Unsurprisingly, it can be observed how definitions of projectification have followed a similar trajectory.

Beyond these descriptive observations, we have outlined and discussed the determinants of the negative aspects of projectification on three different levels: micro, meso, and macro where each level represents a special take on project work with some prevalent characteristics. These characteristics emphasize some common features of each of the *levels*, but also imply that the way projectification is understood changes depending on the paradigmatic perspective taken by the researcher, the time and place in which the observation was made and the level of observation. As highlighted when outlining this conceptualization, projectification as a phenomenon is characterized by a kind of fluidity and amorphism; the phenomenon has no clear boundaries and "cascades" throughout society with varying negative consequences.

6. Forward paths

The calling out of the negative determinants of projectification on multi-levels and their implications on individuals were discussed in this chapter. To systematically understand the effects of projectification on individuals, a more holistic, systematic view of projectification covering more levels is needed.

This research has scratched the surface of projectification and provides a glimpse of the negative determinants. Future research should be broadened to examine the relevance of sociological and psychological theories to project stressors and their influence on employees' well-being. Empirical investigations on this new

working environment and its effect on participants' well-being are especially needed. Future investigators might as well evaluate how work-related contact impacts work stress. One more evolving topic is "personal projectification", which involves an employee's characters, attitudes, abilities, and experiences and the psychological considerations that affect the reaction to the adverse facets of project work (e.g. Yip et al., 2008).

The outcomes of projectifcation fragmentation of personal lives and professional advancements and the impact of individual characteristics on the relationship between project stressors and professional development need further investment.

Moreover, studies are also needed to examine the effect of the institutional environment on employees' behaviors.

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CHAPTER 7

Projectification of society, a sociological perspective

Reinhard Wagner

Alma Mater Europaea ECM

Abstract

Research in the field of projectification has so far been devoted primarily to the intra-organizational phenomenon of an increasing prevalence of projects in the business world and the transformation accompanied by this prevalence. Increasingly, researchers are also focusing on macro-level or societal developments. Empirical research highlights, using Germany as an example, that projectification is also progressing in areas of society outside the economy. Yet little research has been done on why individuals want to engage in projects in the first place, what role projects play in shaping sociological processes, and what institutional frameworks might have an impact on these processes. It will be illustrated that projects offer an ideal opportunity for self-actualization through intensive collaboration with other people. This is most likely to happen on the basis of appropriate cultural-cognitive institutions and is less likely to be achieved through regulations, norms or standards. Eventually, it will also be made clear how projectification can be promoted in order to better cope with the manifold societal challenges in the future.

Keywords: Projectification; Sociology; Institutional Theory; Project Society

1. Introduction

In this chapter, a sociological perspective will be applied to the phenomenon of projectification, which has been increasingly studied in research during the last couple of years. Initial studies of this phenomenon at the automotive manufacturer Renault (Midler, 1995) showed that projectification was primarily associated with its increasing prevalence in business enterprises and the accompanying transformation of organizational structures, processes, and cultures. Studies on the development and status quo of projectification thus focused primarily on the economy.

Beyond that, research on the impact of projectification in other areas of society is still scarce (Wagner, 2022). Especially in times of increasing societal challenges, it is interesting for all decision makers in our society to understand what they can do to use the creative powers of people in projects in a better way. This article shows that projects seem to be a suitable means to realize people's needs for self-actualization through networked collaboration. Sartre (1984) asserts, for example, that the realization of projects is an expression of people's freedom, that by using projects, reality is subject to continuous transformation, and that 'acting' means modifying the shape of the world or could be seen as a way of arranging the means to an end.

So far, projects and project management have been understood primarily on the basis of projects in the field of business, in which they are considered as the most rational and efficient realization of predetermined objectives. If psychology, sociology, and philosophy are looked at, other aspects of projects and their realization come into focus. These perspectives are less about the efficient management of delivery processes, and more about the co-creative cooperation of individuals, which originates from a set of intrinsic needs. There are many examples of this form of collaboration, including in the arts and culture, community development, and the multifaceted volunteerism of the public in our society.

The aim of this chapter is, on the one hand, to contribute to rethinking project management and to inspiring corresponding research in this field. On the other hand, it aims to show how the projectification of our society as a whole can be advanced. Ultimately, it also makes clear that bridges need to be built between the discipline of project management and non-technical disciplines ranging from psychology and sociology to philosophy, to name just a few. After the introduction, the role that projects play in our lives is shown, as well as the perspectives that are important for an analysis of these projects in research. This is followed by a discussion of the phenomenon of projectification, which spans from the micro-level of our immediate environment to the macro-level of societal processes. Finally, three perspectives of projectification will be addressed, the individual, sociological, and institutional perspectives. The chapter closes with a conclusion and an outlook.

2. The role of projects in our lives

Projects have been around since the dawn of mankind (Morris, 2013). Even if we do not know much about the projects from these early times, there are narratives about projects in the 17th century, which was even characterized as the 'projecting age'. Projects at that time were exotic endeavors whose results were achieved through the use of almost superhuman skills. The focus of these narratives is primarily on the people involved in the projects and the key characteristics of both, people and projects. Daniel Defoe (1697:18), for example, described the 'projector' as "he who, having by fair and plain principles of sense, honesty, and

ingenuity brought any contrivance to a suitable perfection, makes out what he pretends to, picks nobody's pockets, puts his project in execution, and contents himself with the real produce as the profit of his invention." The projects in this era were related to the advancement of society, such as the improvement of health care, education and the upgrading of infrastructure.

With the onset of industrialization and economic prosperity based on technological progress, aspects of productivity and the efficiency of processes based on the division of labor became the focus of attention. Projects, and later on their management, optimized product creation processes. People played only a subordinate role in this context. Prominent figures of that time, such as Max Weber, Henri Fayol and Frederick Winslow Taylor, certainly played essential roles in paving the way for project management, which was first applied in defense projects in the United States of America after the end of the Second World War (Hodgson & Muzio, 2012).

Nowadays, the awareness of projects and project management has become widespread in many sectors of society. Antonio Nieto-Rodriguez (2019: 3) even speaks of a 'project revolution' claiming that "from our personal to our professional lives, corporations to governments, individuals to nations, projects are the new reality." The question often arises as to how projects can be clearly delineated, as to what can really be designated as a project, and which undertakings should not be implemented in project form.

It is usually agreed that projects are future-oriented and involve a series of activities to accomplish specific objectives. However, this is wide open to interpretation when answering a number of fundamentally important questions. For example, the question of whether we start and execute projects in a self-determined manner, or whether we do so for someone else, namely a customer or a sponsor. The question of whether we have the freedom to execute projects as we wish, or whether we have to follow a predetermined plan also plays a central role in an ever-changing context. Are we on our own in the execution of the project, or do we collaborate with other people in different ways? How unique are the objectives of the project, or have similar endeavors been carried out whose approaches we can seek to replicate?

Answering these and other questions depends on the scope of the projects being considered. In business, projects tend to be externally determined, there is less individual freedom, everyone works with a pre-prepared project plan and follows the instructions of a project manager (Jensen et al., 2017). In contrast, in arts and crafts, a project is built upon an artist's instructions, who brings all of his or her skills to the creation of an object without necessarily requiring collaboration from others (Gratton & Sheringham, 2005). Projects that produce mature technical products focus on incremental improvement and achieving maximum economies of scale, whereas projects aimed at changing organizational culture tend

to focus on achieving and sustaining that new culture while obtaining maximum stakeholder involvement.

Although the diversity of projects has increased significantly in recent years, standard approaches, processes, and methods have been developed for the management of these projects. Even if this is useful for achieving a certain degree of confidence in the repeated application of proven approaches in projects, many projects fail simply because there is no 'one size fits all' approach. Winter and Szczepanek (2009: 28) therefore propose seven different images for projects and approaches adapted to their management (see figure 1) so that "much greater understanding is gained, for projects and many things at once, so multiple images envisage more of what is going on. They can also help in managing projects in conjunction with one´s own knowledge and experience".

Figure 1 Images of projects framework (Winter & Szczepanek, 2009: 29)

However, Turner et al. (2010), approach the issue from a theoretical perspective and use ideas from different schools of project management. They present nine perspectives that build on the theoretical foundations of modern project management from which a project manager can derive insights when working on a project. One of these perspectives is the project as a social system in which people work with other people on projects for the public. For these types of projects, one of the factors that plays a crucial role in practice is the ability to select and engage the right project team members for a project, as well as providing appropriate leadership. This requires, above all, competences in dealing with people. Further, important questions are addressed, including why we would want to participate in

a project ourselves, what expectations we have of the results and the work of the project, and which role we want to perform.

There is no doubt that nowadays projects have a preeminent role in the economy and every other area of society. In the past, however, the literature on project management mainly dealt with projects in economy and the other areas of application in society received less attention. The focus on the technical and methodological aspects of project management has obscured our view of the social aspects of projects, and our interest in projects in the social sphere. It was not until research on the projectification of society was carried out and the first studies on a project society were published that the re-discovery of projects outside of the economic field commenced.

3. Projectification – from a micro level to a macro level

Since electrification, which took place more than 125 years ago and enabled the industrial revolution to progress, tremendous advancements have taken place. Whether the projectification could lead to similar social development remains to be seen, but this is a trend that began with the observations of Christophe Midler (1995) at the automotive manufacturer Renault. At Renault, Midler observed that over the years not only had the number of projects increased, but the organization had also changed significantly because of the greater importance of projects. The role of project managers had become increasingly important, and some of them reported directly to the board of directors. A variety of project-oriented institutions, such as a project management office (PMO), provided support to projects. Organizational structures, processes, and cultures were significantly shaped by projects. Since the first publication on the topic in 1995, research has been intensively devoted to the trend of projectification and has investigated various facets of the matter at several levels of observation.

Jacobsson and Jalocha (2021: 1583) identify four distinct images of projectification that emerge from engagement with the topic, in particular "projectification as a managerial approach, projectification as a societal trend, projectification as a human state, and projectification as a philosophical issue." Whereas earlier projectification research looked at meso-level organizational change, as projects became more important, research on the projectification of society has become more concerned with macro-level societal and institutional change. The other two forms of projectification, as a human state and as a philosophical issue, have received attention only in recent years, and they address intriguing issues that range from the micro-level effects of projectification on individuals to macro-level effects of projectification on societal development.

Early publications focused primarily on the phenomenon of projectification and its causes and effects (Kuura, 2020). Empirical surveys followed later (Schoper

et al., 2017), but they were mainly on the economies of a number of countries. All the studies showed that the projectification of the economy was already relatively advanced and continued to increase. Interesting differences could be observed among the development of projectification in individual countries and industries. Research on projectification using a perspective that is not only economic has only been carried out in a few research papers so far. Wagner et al. (2021: 10) highlight that "projectification of society is growing in importance and becoming increasingly nuanced."

A 2021 empirical survey in Germany clearly shows the differences between the influence of the projectification of the economy compared to other areas of society (see figure 2). Research on the public sector, leisure, sports, arts, culture, and civic engagement is lagging behind research on the economy, although there has been a noticeable amount of project dissemination in recent years, and this is expected to grow further in the future.

Figure 2 Projectification of society in Germany (Wagner et al., 2022)
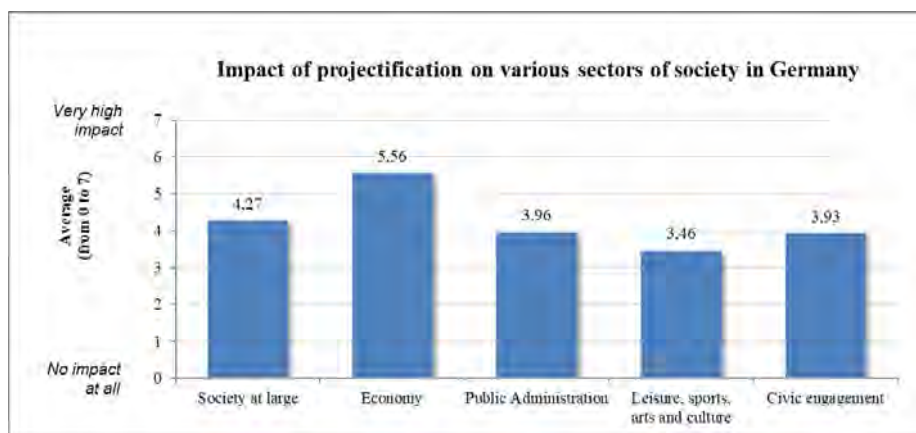
Lundin et al. (2015) argue that the dissemination of projects is due to the fact that successful approaches from the projectification of the economy are also being adopted in other areas of society. One argument is that projects are known to be an efficient and effective way of achieving results, which is also desirable in other sectors. They even outline the path towards a project society. Jensen et al. (2016: 22) make their argument along the same lines, drawing on traditional philosophical concepts to describe projects as a 'human condition' that has a "lasting impact on us as individuals and society." In the project society, the authors argue, projects determine what we do, from when to when we do it, where and with whom. Thus, time, space, activity, and relations determine our lives as individuals, as a community, and as society as a whole. Philosophers, such as Sartre draw a direct

link between the human need for self-actualization and engagement, which are directed towards shaping the future with projects, which are therefore ultimately an expression of our freedom (Crittenden, 2014). With project activities, "the fundamental act of freedom is discovered; and it is this which gives meaning to the particular action which I can be brought to consider. This constantly renewed act is not distinct from my being; it is a choice of myself in the world and by the same token it is a discovery of the world" (Sartre, 1984: 594).

However, Jacobsson and Söderholm (2022: 315) argue that the image of the project society changes ontological assumptions about the individuals that act. Each individual changes from being, a rationally acting 'homo economicus' who is fully aware of the alternatives available for decision-making to a project-focused 'homo projecticus', who is guided by the notion that "life is organized within multiple temporal contexts that both follow each other and exist in parallel."

This continuous stream of temporary projects also brings people into constant contact with new people, who then carry out a project together, disperse again, and possibly meet again in another project. Jensen (2012) uses the metaphor of a dance to describe the project society, in which people meet again and again in different projects, at different times, in different places, and in different forms of relations. These relations are formed by taking part in project activities, and deep connections can even be established over time. For Boltanski and Chiapello (2018: 104), this interaction of people through projects is constitutive of project society: "The *project* is the occasion and reason for the connection. It temporarily assembles a very disparate group of people and presents itself as a *highly activated section of network* for a period of time that is relatively short, but allows for the construction of more enduring links that will be put on hold while remaining available".

In order to better understand and shape the development of projectification in society, it is necessary to look at the different facets of projectification, starting from individuals and moving on to the social fabric of the many project participants in a single organization, and finishing with society as a whole.

4. Multifaceted perspectives of projectification

Even though projectification has been analyzed many times in research and described from different angles in the literature, it is still unclear as to how exactly the process of projectification takes place, which actors are involved in this process and which factors help or hinder (Wagner et al., 2021). Therefore, in the following sections, we will take a closer look at three perspectives of projectification, namely those of individuals who, as key actors in projects, drive projectification. Then, from a sociological perspective, how these actors collaborate in the project network. Finally, we will consider institutional theory and how institutional work shapes the projectification of society.

4.1. *The perspective of individuals*

While prior to the industrial revolution the (mostly male) heroes of the projects were still at the center of popular narratives, the actors gradually disappeared from the focus. Detailed planning and sophisticated controlling techniques were supposed to ensure that the desired results were achieved as efficiently as possible within the specified deadlines, budgets and requirements. The people involved in an industrial project had to strictly adhere to the specifications as well as to the instructions of their superiors. Industrial projects were often described as the only way to complete complex tasks in an otherwise strictly hierarchical environment based on the division of labor. Nevertheless, Foucault (1977) claims that the regime of planning and controlling in project management is reminiscent of being disciplined rather than focusing on self-determined work. Interestingly, it is precisely these organizational mechanisms that are still used in many projects today. They do not give people much autonomy in completing their tasks. Without this autonomy, however, it will be difficult to perform novel and demanding tasks (Lindgren and Packendorf, 2006).

Not only do the contemporary requirements of projects clearly show that this type of discipline is unlikely to yield the success desired, but also people's needs when they contribute to projects, whether in the economic sphere or in civic society. The project society needs self-determined people. Descriptions from the world of art show a rather emotional picture of project involvement. Bayly (2013: 162) for instance writes that "the project itself has proliferated as the basic mode of productive labour to the extent that is has become an organizing principle of life and work, *of life as a work*" and continues to assert that "essential aspects of self-actualization and social relating into *projects* can be seen as part of these developments." Two essential features play an important role in the creation of art projects, namely time and space. A project denominates a "temporal attitude or temporal mode, where the completion is already implied in the projection of the future... in the projective time in which artists are moving through realised and many unrealised projects, they have to constantly imagine the future yet to come" (Kunst, 2012: 65). For most artists, the project space becomes a place of interaction, "an interface between the abstract and the concrete, art and science, the material and the intangible, the mental and the physical, and ultimately the human and the inhuman." (Gratton and Sheringham, 2005: 15)

The project (time) space also enables artists to desynchronize themselves from the world around them, to isolate themselves in order to completely focus on a creative act, because "every project would appear to thrive solely on the hope of its resynchronization with the general run of things. The project is deemed a success if this resynchronization managed to steer the run of things in the desired direction. And it is deemed a failure if the run of things remains unaffected by the project's realization" (Groys, 2010:80).

For example, an activist group called 'The Last Generation' is currently trying to draw the attention of those in power to environmental pollution with spectacular actions, such as by smearing paintings in museums, or by blocking roads, and to show how important it is to act quickly. The activists are not interested in destroying works of art or bringing traffic to a standstill, but in making politicians aware of the consequences of climate change. The projectification of our society is thus driven by these activities that have been chosen by individuals themselves. These activities create unimagined potential for advancing our society. "The Project Society is more like a dynamo: it is the activity that opens the space, the time and the relations, and when the activity stops, the space shuts down, the time shuts down and the relations stops" (Jensen et al., 2017: 4).

The question of what needs individuals have and how projects can help to satisfy these needs remains. Self-Determination Theory (SDT) provides interesting insights and "suggests that both employee´s performance and their well-being are affected by the type of motivation they have for their job activities" (Deci et al., 2017: 20). Three essential needs of individuals are mentioned in SDT. The first is to have as much autonomy as possible in implementing activities, which should foster self-endorsement and ownership. The second need is to be able to act with competence, which means being effective and recognized by others. Finally, individuals also want to experience a certain relatedness with their activities, they want to feel a sense of belonging and involvement, and they would also like to be able to provide this feeling to the other individuals involved (Ryan and Deci, 2017).

In Boltanski and Chiapello's vision of a 'Projective Cité' (2018), projects provide the necessary autonomy for individuals to contribute their expertise and self-actualize collectively with others. Life is understood as a continuous sequence of projects dedicated to very different aspects of existence. In this process, the boundaries between work, leisure and voluntary work also become blurred. Critical perspectives can also be added to this rather euphoric view. At least in a short- to medium-term perspective, the planning and controlling customary in projects to ensure that goals are achieved cannot be thrown overboard so quickly. "The projectified self… is conflicted: it relies on autonomy and yet is dissolving, yet maintaining this ambivalent tension, the project regime produces a power structure and constitutes an *obscured antinomy of predictability and flexibility*" (Kalff, 2017: 21). Aspects such as possible self-exploitation in projects, potential misuse of one's own network, or uncertainty about what will happen after a project are to be considered from the perspective of the individual and society (Jensen et al., 2016). In the project society, individuals can self-actualize in a variety of ways to enrich their lives with a sequence of projects. However, they must also devote energy to these projects, continually engage in them, and demonstrate adaptability (Barondeau and Hobbs, 2019). Individuals are involved in a tight-knit fabric of projects in a projectified society, and they help to prevent that fabric becoming undone.

4.2. *The sociological perspective*

In project management literature, social engagement has so far tended to be represented only by a systematic stakeholder management. The fact that the cause, purpose, and determinant of projects originate socially can best be observed in community development. Projects emerge from the community with the intention of improving the state of the community as a whole, or a particular aspect of it, with collective action. They operate within the specific context (including power relations, history, and culture) and within the framework of self-imposed goals using the resources available (Cicmil and O'Laocha, 2016). Viewed in this context, project managers are understood less as instruments of efficient project execution than as enablers of social interaction. They are seen in the project society as facilitators, coaches, or brokers who help people to network within the context of a project, establishing "collaboration between people from different disciplines or professions, belonging to various departments, institutions or firms" (Boltanski and Chiapello, 2018: 117).

From a sociological perspective, projects can be understood as complex, largely self-organized networks of individuals who want to commit themselves to a common cause and do so out of intrinsic motivation rather than because they are forced to do so. There is a wide variety of fields of activity in society, which include a micro-level of the immediate, social environment (e.g., family and friends and the community), different social organizations and institutions (e.g., political parties, church, and welfare institutions) and overarching state or public institutions.

In literature, the complex interplay between projects, people, and institutions in the social sphere is also referred to with the term 'Project Ecologies'. "This relational space encompasses social layers on multiple scales, from the micro level of interpersonal networks to the meso level of intra- and inter-organizational collaboration to the macro level of wider institutional settings" (Grabher and Ibert, 2012: 176). In addition to professional organizations in the private and public sectors, latent personal networks exist that can be used in the form of projects to solve challenging tasks. For example, project management experts from the business world could meet within the framework of a project management association and collectively develop national or international project management standards. Another example could be the implementation of social projects for the integration of refugees (Wagner, 2018). "Projects apparently operate in a milieu of recurrent collaboration that, after several project cycles, fills a pool of resources and 'gels' into latent networks... Such chains of repeated co-operation are held together (or cut off) by the reputation members gain (or lose) in previous collaborations" (Grabher, 2002: 208).

This view describes the interplay between the temporary collaboration in a project and longer-lasting opportunities for collaboration that extend beyond that.

Projects enable more projects to develop by building and expanding trust between actors, who can repeatedly team up and contribute capabilities acquired in previous projects to starting new ones. Commonality and connectivity in networks or communities promotes projects and ultimately fuels the projectification of society.

Jensen (2012) claims that in the project society, power matters less and less. Projects are therefore not imposed from someone at the top and then executed by employees or contractors; instead, the individual who first takes the initiative, makes the first move, and gathers enough followers to carry out the idea is the one who actually drives the project. The primary goal is therefore to convince others to join the project. Using a strategy of 'pull' rather than 'push'. For example, creating a shared vision for a project, highlighting the commonalities in terms of goals, and emphasizing the purpose of the project can be helpful in achieving alignment and commitment among participants (van der Hoorn and Whitty, 2017).

The projectification of society thus describes the increasing embedding of projects in the social structures. Projects are understood as part of the transformation of society that is intended to resolve current challenges and improve people's lives in general (Jacobsson and Jalocha, 2021). This goes far beyond Christophe Midler's transformation of corporate structures which was identified at Renault. Packendorff and Lindgren (2002) argue that a much broader view needs to be taken here, one that considers projectification as a cultural and discursive phenomenon, and projects as habitual, legitimate, and performative responses to contemporary challenges. Unfortunately, the process of projectification at a societal level has still not been understood well enough, and research has only recently been devoted to the topic (Wagner et al., 2022). Thus, largely unanswered questions still remain: Who are the actors of projectification? What progress has projectification achieved in different societies? Which framework conditions are supportive, and which are detrimental? Finally, research still needs to be carried out on what the dark side of projectification is in our society (Locatelli et al., 2022).

4.3. *The institutional perspective*

The actions of the actors take place in a societal environment that is affected by social norms, values, and rules that need to be understood if the process of projectification in society is to be analyzed. Institutional theory is seen to be instrumental for exploring and understanding the process of projectification (Wagner et al., 2021). This theory addresses "the fundamental issues of social order, social change and the construction of shared meaning systems" (Scott, 2012: 29). Behavior in one part of society may be fundamentally different from behavior in another part of society if, for instance, its regulative, normative, or cultural-cognitive circumstances are different (Scott, 2014). For example, in some European countries there are legal regulations that require project managers to hold project management

certificates in order to be assigned to a public project. In other countries, there are clear requirements for the adoption of project management norms and standards that have to be taken into account during project execution. If these regulations are not applied, a project manager is at risk of being accused of not acting professionally, which —depending on the context— may also have legal consequences. Finally, the cultural-cognitive conditions in a social setting are also important considerations. For example, the cultural-cognitive environment for implementing projects in the German public sector differs significantly from the private sector. The former is geared toward long-term stability and routine work, whereas the latter embraces projects for the efficient achievement of complex change projects and invests a great deal of time and money in the professionalization of project personnel.

The traditional view of research to date has been that it is primarily regulative and normative institutions that exert the strongest impact on the advancement of projectification in society (Wagner et al., 2021). This view has been attributed to the coercion that regulative institutions exert on agents with the threat of sanctions. Although normative institutions are not subject to sanctions in a social setting, the prevailing perception in more professional settings, such as when running projects with scarce resources, is that norms and standards ought to be applied in order to achieve success. This illustrates the inertia of a social setting, or in other words its 'isomorphic forces.' "If everyone follows the same template of organizing, actors are provided with a solution that establishes a taken-for-grantedness in the way organizations should behave" (Sydow and Söderlund, 2023: 89). This is in clear contrast to the characteristics of the previously described project society, in which a project is not driven by "disciplining the professional" (Hodgson, 2002) through coercion and instruction, but by the actors' need for self-actualization. Through projects, institutions themselves can become the target of change, for example, a project can shape a success story or narrative that is adopted by other projects, thus spreading and guiding action in other cases (Söderlund and Sydow, 2019).

For example, the analysis of the role of the German Project Management Association for projectification in society has shown that the association has not had a direct influence on projectification, nor has it been successful with its previous efforts to 'push' projectification through normative and regulative activities. This type of influence can only be achieved indirectly, by positively shaping the cultural-cognitive perception of projects, for example by recognizing successful projects with awards (Wagner et al., 2022). This also applies for mimicking entrepreneurial behaviour, such as in the example of the innovative and extremely fast development of the Covid-19 vaccine by the German company Biontech (Miller et al., 2021). Thus, if the projectification of society is to continue progressing, successful narratives and role models are needed, which could then be brought to the public's attention and thus influence the behavior of other project actors in

a positively. Intermediaries such as project management associations, educators, trainers, and consultants can also exert influence on the positive attitude towards projects (Boltanski and Chiapello, 2018).

5. Conclusions

So far, research and literature have mainly dealt with the projectification of organizations and less with the sociological perspective. However, this perspective is becoming increasingly necessary, given the manifold challenges of our society and the state's inability to solve them on its own. Drawing on disciplines such as psychology, sociology, and philosophy, which have not been referred to very often in the pertinent literature, this chapter demonstrates that these disciplines also have a role to play. Numerous sources prove that projects are also understood as being a contemporary form of activity, which opens up completely new perspectives that move away from the traditional literature on project management. Even though these sources have not presented a programmatic approach, or even a consistent concept, yet it is nevertheless clear that there are also many references for the implementation of projects from a sociological perspective. However, in this context projects are not really understood as being the efficient implementation of an assignment, as is the case in business. Instead, they are generally seen as undertakings that stem from an individual's determination for self-actualization, and they are implemented in time and space to achieve a self-imposed goal, either alone or with others. At the same time, the question arises as to who can do what to promote the process of projectification in society. With recourse to institutional theory, people's need for the implementation of projects has been described as being less achievable if a 'push' by regulative or normative institutions is used. However, a 'pull' by positively charged narratives and role models of successful projects can provide positive outcomes.

Research in this field will be faced with the exploration of this interrelation in more detail in the future, and it will provide guidance to practitioners as well as decision-makers at all levels of society. Cross-fertilization between the disciplines mentioned here is also a task that research should continue to address in the future. There are some exciting analogies that can be used when dealing with the topic and much to learn from each other. Project management associations could also organize an exchange between disciplines, societal sectors, and countries. After all, one thing is becoming increasingly clear: projects are a pivotal part of our lives, of our society, and they will help shape our future.

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About the author

Reinhard Wagner has been active for more than 35 years in the field of project-related leadership in the private, public, and civic sectors. As Managing Director of Tiba Group Services GmbH, a leading PM Consultancy in Munich/ Germany, he supports executives and clients in transforming their companies towards a project-oriented, adaptive, and sustainably successful organizations. He has published 40 books as well as several hundred articles and blogposts on project management. For over 25 years, he provided his expertise voluntarily to the German Project Management Association (GPM), as well as the International

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CHAPTER 8

Key issues in the management
of the project-based organization[1]

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Abstract

In the past I have tried to develop a comprehensive model of how to manage the project-based organization within the projectified society. My research has developed elements essential to the management of the project-based organization. In this chapter I describe several elements. I give a brief history of the development of thinking on their contribution to projectification, and a brief overview of their contribution.

1. The management of the project-based organization

There are many words that are used to describe organizations that do a significant proportion of their work as projects. (Miterev, Mancini &Turner, 2017). Anne Keegan and I used the phrase, "project-based organization", (Turner & Keegan, 2000, 2001), whereas in the work we have done with Martina Huemann, (Huemann, Keegan & Turner, 2007). we have used the phrase, "project-oriented organization". We can differentiate between the two, (Miterev, Mancini &Turner, 2016). Project-based is bottom up. The work an organization does for clients requires it to adopt project-based ways of working as it main business processes; it is project-based perforce. On the other hand, project-oriented is top down. The organization makes the strategic decision to adopt project management as it way of doing business, and to adopt a project culture; it is project-oriented by choice.

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1. The author's first-person writing style has been respected as the chapter recapitulates all his research related to project management.

The two should meet in the middle; an organization that is project-based should choose to be project-oriented, and an organization should only choose to be project-oriented if it is project-based. However, that is not always the case.

Anne Keegan and I, in papers listed in Table 1, set ourselves the objective of developing a comprehensive theory for the management of the project-based organization. In the event, we developed theories for many elements, Table 1, but the comprehensive theory eluded us. Maxim Miterev and I, (with the help of Mauro Mancini), have taken up the challenge again, (Miterev, Turner & Mancini, 2017; Turner & Miterev, 2019). I cover elements of the model below, giving a brief history, and sometimes greater explanation.

Table 1: *Elements of the theory of the management of the project-based organization*

Element	Paper
Governance	Turner & Keegan (1999, 2001)
Operational control	Turner & Keegan (1999, 2000)
Learning	Keegan & Turner (2001)
Innovation	Keegan & Turner (2002)
Human Resource Management	Keegan & Turner (2000)

2. GOVERNANCE

The first time I saw the words project management and governance together in the same sentence was in the papers by me and Anne Keegan (1999, 2001). At the time a lot was being written about governance in the general management literature, and it was natural for people researching project management to ask whether it was relevant in our field. I am fairly certain that David Shannon, who founded the Association for Project Management's Special Interest Group on the Governance of Project Management came to the party separately from me, (Association for Project Management, 2004). Like Leibniz and Newton who both invented calculus independently, people are working in the context of the same discussion, and come separately to the same idea. I came to governance because I thought an effect that Anne Keegan and I had observed was a transaction cost issue. I had been introduced to transaction cost analysis by Susan Foreman (1996). I read the books of Oliver Williamson (1995, 1996), and the papers by me and Anne Keegan (1999, 2001), resulted.

I realised later that the work I did with Reza Peymai (Turner & Peymai, 1995) was touching on governance. Anne Keegan and I noticed that governance differed for routine supply and projects. With routine supply, for external transactions, (markets), the governance structure aligns with the transaction, but for internal transactions the governance structure is aligned with the hierarchy perpendicular

to the transaction, (hierarchies), (Williamson, 1975). On projects the governance structure is always aligned with the project, which is the transaction, for both internal and external supply. Turner & Peymai (1995) had effectively observed that.

Roland Gareis has said that he does not believe in project governance. He says you can only have the governance of a permanent organization. In my most recent writing on project governance (Turner & Müller, 2017), I have gone to the other extreme. I got heavily involved in the idea of organizational project management. There are three primary organizations involved in the management of projects: the investor, the project and the contractor. All three require governance, as do the three interfaces between them (Turner & Müller, 2017). It was the governance of the interface between the investor and the contractor that Anne Keegan and I researched (2001). The project can be involved in several more organizations: the annual investment portfolio at the investor; a program at the investor; the portfolio of work at the contractor; and a project network. All require governance (Turner & Müller, 2017).

2.1. *Principal-agency relationship*

Ralf Müller's doctoral thesis, (2003), dealt with communication between the project manager and project sponsor, and that lead us into consideration of the principal-agent relationship between them, (Turner & Müller, 2003, 2004). We also compared transactions costs and agency costs. I was at a workshop on the research into *Rethinking Project Management* being run by the University of Manchester. Stephen Ward from the University of Southampton was writing something on a flip chart and wrote the words "principal" and "agent". I raised it with him afterwards, and he said that he thought the three most important issues in project management were the adverse selection problem, the moral hazard problem and risk management, though I think it may have been lost on everyone else in the room.

2.2. *Program and portfolio management*

I have research program and portfolio management, Turner (2016). I didn't invent the idea. I attended the IPMA Expert Seminar on multi projects in 1988, which included a paper by David Ferns, published later in the International Journal of Project Management, (Ferns, 1991). But I did light a slow burning fuse. What caused program and portfolio management to take off in the UK and US was the work of a Special Interest Group run jointly by the Association for Project Management and British Computer Society. That SIG was established and managed initially by Geoff Rees. Geoff once told me that he was stimulated to found the SIG by my paper, (Turner & Speiser, 1992). He said he realized this was an important topic no-one was researching. People now recognise the importance of

program and portfolio management in helping organizations achieve their strategic objectives, (Koch & Gemünden, 2023; Vadake, 2023).

3. Organizational behaviour

Earlier this year, I wrote an essay for the International Journal of Project Management on 40 years of research on Organizational Behaviour in Project Management, (Turner, 2022).

3.1. *Leadership*

Up until Ralf Müller and I did our research into project leadership in the mid-2000s, the project success literature studiously ignored the project manager as a success factor on projects, (Turner & Müller, 2005). Lists of success factors were produced that did not include the project manager's competence. The most famous was the one by Pinto & Slevin (1988). I once challenged Jeffrey Pinto on this and he said his methodology was to interview project managers, and most of them were too modest to mention themselves as success factors on their projects. Jim Johnson (2006) does include the project manager's competence as one of 10 success factors.

Ralf Müller and I (2007a) researched how the project manager's leadership style impacts project success with several objectives:

1. To determine if the project manager's competence is a success factor on projects.
2. To determine if the project manager's leadership style impacts project success.
3. To determine if that varies by type of project.
4. To determine if the managers of project managers take account of the project manager's competence and leadership style when appointing project managers.

We found several key results: The project manager's competence and particularly their leadership style does impact project success. We used a leadership model consisting of three leadership competences: emotional intelligence; managerial competence; and intellectual competence, (Dulewicz & Higgs, 2005). The three competences comprised 15 competencies. We found on most projects the project manager's emotional intelligence impacts success. Although this is a finding which is obvious, we were the first to discover it. Several other people subsequently researched the project manager's emotional intelligence. However, we also discovered that on projects where cost is important the project manager's managerial competence impacted success. Of the 15 lower level competencies, different profiles of them were important in different types of projects. Communication and

conscientiousness were important on many projects. We had 400 responses to our survey and Dulewicz and Higgs had 1,000 responses from general managers, so we were able to compare project managers to general managers, (Turner, Müller & Dulewicz, 2009). We found that project managers were more conscientious than general managers (by half a standard deviation) but less good at communication (by quarter of a standard deviation). So the answers to questions 1 to 3 were yes. With question 4, on more complex projects, managers tried to match the project manager's competence to the project. But it will emerge again when I discuss human resource management. Many organizations do not have a career structure for project managers and so have no logical way of matching project manager to projects.

3.2. *Stakeholders*

I have tried to switch from talking about Managing Stakeholders to Engaging with Stakeholders, (Derakhshan & Turner, 2022; Turner, 2014). There is a program on British television called, *One Man and his Dog*. It is about sheep dog trials. The shepherd sends out his dog to round up sheep, get them to perform some tricks, then herd the sheep into a pen, where the shepherd closes the gate. I think some people view stakeholder management like that, round up the stakeholders, push them into a room, lock the door, and then go off and do the project without them. Whereas we should be engaging with the stakeholders, marketing the project to them, getting them to buy into it and believe that the benefit of the project to them is greater than the value they place on their involvement, (Turner & Lecoeuvre, 2017). Huemann, Eskerod & Ringhofer (2016) talk about managing for stakeholders versus management of stakeholders. "Of" is herding them into the room and locking the door. "For" is developng the project to be beneficial to the stakeholders, thereby getting them to buy into the project and engage with it, (Turner & Lecoeuvre, 2017). Usually for is right, but occasionally of is right.

I have also tried to link stakeholder engagement back to leadership, (Derakhshan & Turner, 2022). Engaging with stakeholders is of course a leadership role. But I have also tried to show how the project manager's emotional intelligence can improve stakeholder engagement, (Turner, 2014).

3.3. *Ethics*

My first introduction to ethics in project management was when one of my masters students, Alistair Godbold, wrote his masters thesis on the topic, (Godbold, 1999). Godbold, to this day, is still giving talks on ethics in project management. Ralf Müller, Jingting Shao, Erling Andesen and Øvynd Kvalnes and I (2014, 2016) have been researching ethics in temporary organizations, and the influence of the governance structure. The objectives were:

1. To determine the nature of ethical issues faced by managers in temporary organizations, including projects and programs;
2. To determine how the nature of the governance structure influences the nature of the ethical issues faced and the way project managers respond to them.

The model of the governance structure we used is one developed by Ralf Müller (2009), based on two dimensions, whether the organization controls by behaviour or goals, and whether the organization has a shareholder or stakeholder oreientation. We identified that the three main ethical issues faced by project managers are:

1. Optimization issues: do you optimize the project for the client or the contractor.
2. Transparency issues: people lie about progress.
3. Relationship issues: project team members have inappropriate relationships with other stakeholders.

We found that the nature of the governance structure does influence the nature of the ethical issues encountered. Where organizations control by outputs, people are motivated to inflate progress. Where organizations are shareholder focused, the project manager is motivated to optimise the project for their organization and not the client. Where the organization controls by results with a stakeholder focus, the project manager is least likely to seek help, but will seek help from the steering committee. Where the organization controls by behaviours with a shareholder focus, the project manager is most likely to seek help, but will seek help from their supervisor. Where the organization has a stakeholder focus, end users are the key stakeholder, and there is higher trust between the project team and external stakeholders. Where there is a shareholder focus, the sponsor, representing the shareholders, is the key stakeholder and there is lower trust between the team and other stakeholders.

3.4. *Human resource management*

A focus on Human Resource Management arose naturally in the work Anne Keegan and I did in the late 1990s (2000). As I said earlier, our aim was to develop a comprehensive model for the management of the project-based organization. That eluded us, but we identified the five key elements listed in Table 1, and identified how those five things should be managed. However, as the citation shows, we did not feel we identified enough about Human Resource Management practices to write an academic paper, that is not until we teamed up with Martina Huemann. With Martina Huemann, we conducted a four-stage process to research

Human Resource Management in the project-oriented organization. We conducted a literature review (Huemann et al, 2007), followed by two rounds of interviews and a series of case studies (Huemann, Turner & Keegan, 2004). We identified a number of key issues:

1. Project managers, line managers and human resource managers have responsibility for Human Resource Management in project-oriented organizations. Human Resource Management is becoming more spread and networked, covering both the permanent part and temporary part of the organisation. Not only line managers take on Human Resource Management tasks but also Project Managers, (Keegan, Huemann & Turner, 2012).

2. In a matrix organization, the individual is assigned from the line organization to the project. Human Resource Management needs to be practiced both in the line and on the project. The line is responsible for inducting the individual into the organization, appraisal, reward and development in the line, and release from the organization. The project is responsible for assigning the individual to the project, appraisal, development and reward on the project, and release from the project. The most significant appraisal, development and reward usually takes place in the line, because the organization needs to have a focus over a timescale longer than the project for the development of the individual's career and the development of organizational capability. However, appraisal on the project is important, and organizations need to ensure appraisal in the line is based on project appraisals. Rewards and development on the project tends to be project specific. It is important that the two sets of Human Resource Management practices are consistent and supportive, which means the practices in the line need to be adapted from those used in classically managed organization, and the practices on the project need to be developed to be supportive of the line (Huemann, Turner & Keegan, 2004).

3. As people are released from the project and from the line organization, their knowledge needs to be captured (Turner & Keegan, 2004).

4. The ethical treatment of individuals is a significant issue in project-oriented organizations (Turner, Huemann & Keegan, 2008). If people are working on several projects, it can be difficult to balance their workload.

3.5. *Competence, capability, learning and innovation*

Lynn Crawford did her doctorate on the competence of project manager, (Crawford, 2001). She and I have worked together further to a small extent on project management competence, but primarily the project management capability of organizations (Crawford & Turner, 2007). Anne Keegan and I had looked at learning and innovation in project-based organizations (Keegan & Turner, 2001,

2002). We identified that standard project management practices tend to limit innovation, with a strong focus on control and following the standards. We identified competency traps, whereby project management practices tend to lock people into the traditional ways of working rather than trying new things. The standard management learning model is three steps: variation, selection and retention. People try new ways of working, decide which ones lead to improved performance, and retain those in the learning repository. In project-based organizations there needs to be a fourth step, distribution. Variation takes place on projects, retention occurs in the central repository and reuse occurs on another project. That creates extra complexity for knowledge management in project-based organizations (Turner & Keegan, 2004).

4. CONTINGENCY

Governance and organizational behaviour are the two main strands of my research. A third strand is in the field of contingency and categorization. Hanisch & Ward (2012) show me as one of the four most significant authors in contingency theory in project management. A significant milestone in the research was the work on project categorization systems with Lynn Crawford and Brian Hobbs (Crawford, Hobbs & Turner, 2005, 2006).

4.1. *Goals and methods*

Ralf Müller and Jingting Shao (2013) very kindly said that my paper with Robert Cochrane (1993) initiated theory development in project categorization. Turner & Cochrane (1993) identified that different management approaches are required on projects depending on how well defined are the goals and methods of delivering the goals.

4.2. *Projects in small to medium-sized organizations, SMEs*

I have researched projects at two extremes, megaprojects (Drouin & Turner, 2022), and projects in small to medium sized organizations. Megaprojects receive greater attention in the literature at large, but both make up about 20% of GDP. It is just small projects are out of sight. Ann Ledwith, John Kelly and I (2009) identified that, in Europe, projects make up a third of the turnover of SMEs, and SMEs make up 70% of GDP, so about 20% of GDP is projects in SMEs. In 2008 when we did the research global GDP was $US50 trillion, so extrapolating globally $US10 trillion was spent on projects in SMEs in 2008. If a 20% improvement could be made by reducing cost, finishing earlier or increasing the benefit, that would generate £US1 trillion. That was the amount of money made available that year by the G20 countries to save the global economy. Making a 10% improvement on projects ion SMEs is enough money to save the global economy.

Anne Ledwith and I (2017) found that:

1. SMEs do smaller projects than larger organizations, and so require simpler, less bureaucratic management practices. Many SMEs do tailor their practices intelligently. But for firms new to project management, the professional standards can be very daunting. Firms new to project management require a primer to get started.
2. Many SMEs are contractors. The professional standards tend to be written for larger organizations who are clients. Procurement is a body of knowledge area, but not winning and managing contracts.
3. SMEs have a strong people focus. We found in Europe there tends to be crisis of growth at 50 people, the boundary between small and medium-sized organizations. As organizations grow past 50 people they have to switch from working in multi-disciplinary teams with close contact between the people and the managers, to working as specialists with middle managers.
4. In SMEs, the project management overhead is greater. On large projects, project management accounts for about 5% of the cost of the project, whereas in SMEs it can be up to 30%. The efficiency of resource usage is a significant issue in SMEs. However, SMEs perceive the benefit of using project management much greater than the cost.

4.3. *Mega and complex projects*

I have done some work at the other extreme, on megaprojects (Drouin & Turner, 2022). John Eweje (2010) did his PhD on how decisions made by project managers affect the strategic value delivered by megaprojects in the Oil and Gas Industry. He, Ralf Müller and I published a joint paper. He discovered several interesting results, but the ones that interest me those most are:

1. Of the independent variables, information on stakeholder satisfaction had the greatest impact ion strategic value. This is one of several elements of research I have done over the past few years that shows that one of the most important success factors on projects is stakeholder satisfaction, which illustrates two further things
   • the need for project marketing (see below) and stakeholder engagement (see above);
   • projects should be stakeholder focused not shareholder focused.
2. Of the moderating variables, one had an affect the other did not. Senior management had an effect, but the length of time somebody had been a project manager did not improve their decision making.

Nathalie Drouin and I (2022) include a case study in every chapter. Most of them were successful. We find the successful megaprojects have five features in common:

1. They adapted project management to deal with complexity as described above
2. They chose the economically most advantageous contractor rather than the cheapest. The contractor that bids the least is the biggest liar. Unfortunately it takes time and effort for contractors to produce economically advantageous bids, and it takes time and effort for clients to assess them. Often corners are cut.
3. They used principal-steward contracting rather than principal-agent. It has been known for a quarter of a century that principal-agent contracting only works on simple projects, and on more complex projects you need principal-steward contracting, (Davis et al, 1997), but old habits die hard.
4. They worked closely with the internal stakeholders and treated them with respect.

There are people who consider themselves tough business people, who think that means they should choose the cheapest contractor and squeeze them to almost making a loss. They use principal-agent contracting to closely control the contractors and try to bully them into submission. They also bully the external stakeholders. When the project fails, as it certainly will, it cannot be their fault because they are tough business people. So, they search around in what has been written about why megaprojects fail, and conclude it must be because of fragility. "Not my fault, I am a successful tough business person".

Nathalie Drouin and I (2022) give the example of the Amsterdam North-South Metro Line. That project was going late and overspent. However, they changed the relationship between the client and contractor from principal-agent to principal-steward, by making the contractor a department within the client organization. They also stared treating the people of Amsterdam with greater respect, adopting a policy called BLVC, in Dutch Bereikbaarheid, Leefbaarheid, Veiligheid and Communiatie, (accessibility, liveability, safety and communication). The rest of the project was completed to the revised time and cost target. They also give the example of storm water tunnels built in Sydney in advance of the 2000 Olympic Games. There was a problem with an air vent. If they had been using principal-agent contracting, the contractors would have said to the client we are out of here until you solve the problem, and the project would have failed at that point. Because they were using principal-steward contracting the contractors shared in the solution of the problem.

Turner & Xue (2018) gave a novel interpretation of success on megaprojects. What is important is megaprojects should produce social benefit, but they should produce that social benefit at a time and a cost that makes it worthwhile. Turner & Xue (2018) said that complex megaprojects are non-linear, which means small changes to inputs can lead to large changes in outputs. So anyone who claims they can precisely predict the time and cost to completion of a megaproject at the start is a fool, a liar or a fraud. Turner & Xue give many examples of megaprojects that were somewhat late and/or overspent, but still produced a worthwhile social benefit, and based on that social benefit produce positive net present value. They use the example of the Thames Barrier. It was somewhere between 30% to 300% overspent depending on how you do the calculation – my calculations suggest it was 100% overspent. It was also 100% late taking eight years instead of four. But by preventing flooding in London it has paid for itself many times over. However, it also illustrates the importance of luck. There was no flood in the eight years it was late; if there had been it would have changed the economic calculations.

Nathalie Drouin and I (2022) give the example of the Gotthard Base Tunnel, a tunnel through the Swiss Alps connecting Milan to Zurich. Because of severe geological problems, the project was late and overspent. But once completed the project produced substantial social benefit, enabling people to travel between Milan and Zurich more quickly and more comfortably. It also transferred substantial amounts of freight from road and air to rail. The project also made positive net present value and so was an investment success.

Nathalie Drouin and I (2022) also say that unfortunately people have a tendency to anchor early estimates. They give the example of the Betuweroute, a freight railway line between the Port of Rotterdam and Germany. An early guestimate of the cost was made before any design was done. The project was 30% overspent on that guestimate. The project was only 6% overspent on the estimate produced after front end design was done. Unfortunately people anchor the guestimate and say the project failed.

4.4. *Nine schools*

We come to the Nine Schools of Project Management (Turner, Huemann, Anbari & Bredillet, 2012). Our aim was to produce a project management version of Gareth Morgan's book, *Images of Organization* (Morgan, 2006), or the book *Strategy Safari* (Mintzberg, Ahlstrand & Lampel, 2008). The difference with Gareth Morgan's book was that many of his images were mutually exclusive: an organization can be a machine, an organism or a brain, but not a mixture of them. With our perspectives, all nine perspectives apply to every project. Our thesis was that there are a number of "schools" of research in the field of project management, and corresponding to those schools are images or perspectives on projects. Our

suggestion was that project managers, rather than just thinking that they have to manage time, cost and quality using earned value management, they should decide which perspectives are relevant to their project, turn to the appropriate schools to find methods to manage the important issues on their project, and develop a methodology specific to their project.

We identified nine schools or perspectives, listed below. We based the schools on work done by Frank Anbari (1985), Christophe Bredillet (2004) and Jonas Söderlund (2002). The identified five, seven and seven schools respectively. To theirs we added schools and split schools to come up with our nine. Why nine? The psychologist, George Miller (1956), suggested people are best processing information in lists of seven: seven days of the week; seven deadly sins; seven wonders of the world; etc. So he suggested lists of seven plus or minus two. Mintzberg et al (2006) said people working in strategy are more intelligent than the general population so could cope with ten schools. We thought we could suggest that people working in project management are more intelligent still and could cope with twelve. We could have split the governance and behaviour schools as indicated below. But in the end we decided people working in project management are more modest than people working in strategy, and so decided to have nine. We could have reduced the number to seven by merging optimization and modelling and process and decision. We didn't merge optimization and modelling because although optimization and hard systems modelling go together, soft systems modelling doesn't fit with optimization. We didn't merge process and decision because we wanted to keep process separate. The systems school (optimization) and the process school are two significant branches of project management that we wanted to recognise. The nine schools are:

1. Success – the project as a business venture
2. Governance – the project as a legal entity
3. Behaviour – the project as a social system
4. Marketing – the billboard for the project
5. Process – the project as an algorithm
6. Decision – the project as a computer
7. Modelling – the mirror on the project
8. Optimization – the project as machine
9. Contingency – the project as a chameleon

Including contingency as a school makes it a self-reflecting mirror. The nine schools are a contingency model, which includes contingency as a school.

Governance could have been split into the temporary organization, the governance of project management and contract management. Christophe Bredillet (2004) had contract management and not governance. Behaviour could have been split into organization behaviour and human resource management.

5. MARKETING

I ran seminar on the nine schools at SKEMA Business School several years ago, and some people said marketing is not a school and is not relevant to project management. But research in project marketing is more than twenty years old. I commissioned the chapter by Susan Foreman (1996) a quarter of a century ago, and Bernard Cova and Robert Salle have been working on project marketing for a similar time (Cova, Mazet & Salle, 1996). Many project managers do not think that they have a marketing role, but, no, they have a significant role (Turner, Lecoeuvre, Sakaran & Er, 2019). The role of project marketing is shared by strategic managers, account managers and project managers, as suggested by Anne Keegan and I (2001) in our work on Governance.

More recently I have been placing project marketing within the context of organizational project management (Turner & Lecoeuvre, 2017). There are three organizations involved in the management of projects: the investor; the contractor; and the project itself. All three have to do marketing. The investor needs to market the investment throughout the investment life-cycle, involving financiers, contractors, operators and client. The contractor needs to market their competence and trustworthiness to win new business. And the project need to market itself to its stakeholders as part of stakeholder engagement. It need to convince the stakeholders that the benefit they will get from the project is greater than the cost they place on their involvement, and to that by communicating with them in their place of work, (4Ps). Roya Derakhshan and I (2022) also linked marketing with stakeholder management.

6. SUCCESS

I have been writing about project success for as long as I have been writing about project management (Andersen, Grude, Haug & Turner, 1987). In the first edition of my book (Turner, 2014), I differentiated between what Terry Cooke-Davies (2001) later labelled project success and project management success. Since the first edition of my book, I have had a hobby horse that the day before the project starts, the key success criterion is it should deliver positive net present value; (project success), the day after it starts, all the project manager focuses on is time, cost and quality, (project management success). If positive NPV was important before the project starts it should be important all the way through. That was an idea explored by Roxanne Zolin and me (2012). During the project, the project manager should not (just) be monitoring whether the project will finish on time, cost and quality, but whether it will deliver the desired outcome in the months following the project, and the desired business objectives in the years following the project. And if the project gets into difficulty, it is more important to optimise the outcome and business objectives than optimise time, cost and quality. Roxanne and

I also developed the concept of leading performance indicators. Key performance indicators are measures of the success criteria monitored through the project to ensure it is likely to deliver the desired objectives. Leading performance indicators are measures of the success factors monitored through the project to ensure it is likely to deliver a successful outcome. Nine of the eleven leading performance indicators we identified were the satisfaction of different stakeholders, supporting what I said above when discussing John Eweje's work, that project managers need to take a stakeholder perspective and not a shareholder perspective. Pedro Serrador and I (2015) also explored the relationship between project success and project management success.

Ralf Müller and I (2007b) did some related work. We asked 900 project managers to rank the importance of ten success criteria to the project and then measured their performance against the ten success criteria and the project overall. We were then able to correlate the importance they attached to the ten criteria, to how well they achieved each of the criteria and to the overall success of their project. The criterion that had the biggest impact on success was.

6.1. *Team satisfaction*

As I keep saying. "Are we surprised?" Team satisfaction has the biggest impact on project success, and yet how many project managers focus elsewhere? The criterion that had the second biggest impact was user satisfaction and the one that had the third biggest impact was customer satisfaction. Yet again the three most important out of the ten related to stakeholder satisfaction, This supported the results of Turner & Zolin, (2012). One of the three that had NO impact was.

6.2. *Finishing on cost time and quality*

If you want your project to be successful, focus on the satisfaction of the stakeholders. Time, cost and quality will then take care of themselves.

As I said, I am glad that Terry Cooke-Davies created the simple construct of project success and project management success. Pedro Serrador and I measured the correlation between then. 60%. If you project finishes on time, cost and quality, then 60% of the time it will achieve its business objectives, but 40% of the time it won't. And if it finishes late and overspent, then 40% of the time it will still achieve its business objectives.

6.3. *Shareholder value*

Projects for shareholder value is what I consider to have been my might have been. I became interested in trying to assess the contribution project make to the shareholder value of the sponsoring organization, (Mills & Turner, 1995), and to

try find how that contribution varied under different financial ratios for the organization, (Turner, 1998). I hoped that might indicate under what financial ratios finishing on time, cost or quality might be more important. At Erasmus University I had a PhD student who looked at how shareholder value analysis could be used for project appraisal, (Akalu, 2003).

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The Dark Side of Projectification: the flexibilization, responsibilization and rationalization of the projectified self

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Abstract

The process of projectification transforms economic organizations and social institutions by increasing the importance of project logic and structure. This process affects individuals as well, with a strong emphasis on self-responsibility, self-organization, time-keeping, temporariness, and efficiency, and it creates a new form of subjectivity: individuals become and have to act as *projectified selves*. Projectification transforms individual life designs and biographical patterns to match the logic of projects. For individuals, projects offer a normative promise of efficiency that goes hand in hand with the idea of rational controllability and plannability by using specific management techniques. However, projectification is ambivalent. Its promises of autonomy, self-actualization, and self-efficacy hide a dark side—not one that is necessarily bad but that is potentially dangerous for individuals. This essay discusses the roots of projectification —flexibilization, responsibilization, and rationalization— as key effects of neoliberal governance. For projectified selves, these roots amount to a biographical structure that controls new individual liberties and allows individuals to justify their life choices as long as they increase the value of their own projects. The projectified biographical structure —lastly— increase vulnerabilities that potentially lead to precarious, disrupted lives.

Keywords: Projectification; Projectified Self; Precarity; Flexibilization; Rationalization; Responsibilization

> "My point is not that everything is bad, but that
> everything is dangerous, which is not exactly the
> same as bad."
>
> —Michel Foucault (1982a)

> "There is no dark side in the moon, really; as a
> matter of fact it's all dark. The only thing that
> makes it look light is the sun."
>
> —Gerry O'Driscoll

1. Introduction

The essay discusses the dark side of projectification for individual *projectified selves*. The process of projectification transforms social contexts to the structure and logic of projects and increase the importance of self-responsibility, self-organization, time-keeping, temporariness, and efficiency. Alongside, as individual life design and as biographical structural patterns (Berglund et al., 2020; Kalff, 2017b), projects have become the designated characteristic of economic organizations and social institutions (Lundin et al., 2015). Projects offer a normative promise of efficiency, rational controllability and plannability that is guaranteed when dedicated management techniques are applied. These types of endeavors are ambivalent: their promises of autonomy, self-actualization, and self-efficacy hide a dark side—not one that is necessarily bad—but that is potentially dangerous for individuals that are vulnerable to precarity.

Organizations are a modern phenomenon. Max Weber saw how administrative bureaucracies permeated modern society (Weber, 1958, 1978). Departing from Weber's diagnosis of bureaucratization that he interpreted as modern rationalization processes, numerous authors have emphasized the importance of organizations in and for society: Presthus (1962) examined "the organizational society" and its individuals. Adorno spoke of the administered world that relies on alienating (*verdinglichen*) bureaucratic processes while guaranteeing objective and equitable treatment (Adorno, 1953/2003). Perrow examined the 20th century as a "Society of Organizations" where all life successively takes place in organizations, is regulated by organizations, and relies on organizations (Perrow, 1991).

The importance of organization and administration is unabated. However, since the middle of the 20th century, projects increasingly have become the formative mode of economic activities, organizations, and our lifestyles (Ekstedt et al., 1999; Grey, 1994; Jacobsson & Lundin, 2019; Jensen, 2012). Society and organizations are still closely interwoven, but the latter have been transformed into flexible temporary organizations that have replaced large permanent administrative bureaucracies (Lundin et al., 2015). In "projectification" processes (Midler, 1995), corporations decentralize hierarchical hierarchies to autonomous projects and replace direct modes of control with indirect ones. Thus, the use of delimited

projects has become a central strategy that is used to achieve corporate goals that are flexible with regards to markets and customers (Herbst, 1976).

Nearly 30 years after Midler's seminal diagnosis of the projectification process at Renault, project logic has expanded ubiquitously in society (Lundin et al., 2015; Lundin, 2016). Project logic proposes a specific structure that changes our relationship with society, organizations, and ultimately ourselves. The promise that projects hold of autonomy and flexibility rids society of the "Iron Cage" that Max Weber believed was imposed by formal rationality. However, this liberation from old power structures and domination has led to new forms of governance: project logic employs self-control and self-management to rationalize behavior based on codes of conduct and personal freedoms (Foucault, 1982b, 1988). These indirect modes of control become the premises and consequences of autonomy. After the end of the "Iron Cage", new project-specific forms of control and governance have been integrated into organizations, as well as into the form of our biographies. Projectification is not a liberating trajectory per se that rids us of old constraints. It entails new dependencies and practices of subjectification. Projectification constitutes a neoliberal subjectivity that I have called the *projectified self* (Kalff, 2017b). It instills "self-controlling, self-improving, self-commercializing, life-compartmentalizing, and deadline-driven human beings" (Berglund et al., 2020, p. 367).

This article sheds light on the dark side of projectification as being a neoliberal mode of governance for individuals. It does so by exploring the following questions: *How do structural effects affect projectification and the projectified self? Where does the dark side of projectification lie for the individual subject?* This essay scrutinizes the collateral effects of projectification processes in society and economy to provide a more nuanced perspective on how organizational logics permeate society and affect individuals. Projectification represents a specific kind of instrumental reason that addresses challenges by kicking off yet another project and by handing us the instruments to do so.

To begin with, it is interesting to turn to the trope of the dark side. On the one hand, the metaphor of 'the dark side' describes the negative qualities of an otherwise positive phenomenon. Inevitably, positive and negative features are traded off against each other. On the other, the trope means that certain aspects are illuminated while others remain in the shadows. Some qualities remain inconceivable in comparison to those in spotlight. Thus, to bring light to the dark side we need to turn the object over, illuminate it differently, or enter the darkness and let our eyes get accustomed to it so that we can see. In scientific discussions, the trope of the dark side serves primarily to highlight the negative sides and dangers that are part of the positive features of research objects. We see the dark side of planning, digitalization, ethical organizations, modernity, and Western ideas of progress and enlightenment—all of which initially present their positive characteristics of rational and efficient solutions for social and societal problems (for example Alexander, 2013; Flyvbjerg & Richardson, 2002; Mignolo, 2011).

In this essay, the trope of the dark side will bring the unnoticed and negative aspects of projectification into the light. Therefore, I will first give an overview of the emergence of the project logic and projectification. Then, I will briefly describe existing research that utilizes the topic of the dark side of projectification. In the second section, I will turn to a discussion of projectification in neoliberal societies in terms of the three structural transformations—flexibilization, responsibilization, and rationalization—to show how projectification needs, but also facilitates, these transformations. In section three, I will discuss these structural transformations and their impact on subjectivity, legitimacy, and potential precarity of the projectified self. Finally, the essay will conclude with a comment on the value neutrality of projects and the instrumental character of projectification.

2. PROJECTS, PROJECT LOGIC AND PROJECTIFICATION

2.1. *The emergence of the project logic*

The origins of projects and the modern project logic have been set out in detail elsewhere (Bröckling, 2016, pp. 172–177; Kalff, 2017b, pp. 14–15, 2018, pp. 33–49). Projects made their first appearance Daniel Defoe's (1697) character study of the 'projector', a dishonest person, an imposter who promised the moon. Ever since then, projects and their related conveyors, executors, planners, and managers have become nothing less than the modern archetype of management (Gaddis, 1959). The term "project" and its associated project managers have undergone a positive image change. Thomas (2006) emphasized how modern project management first took shape in the military-industrial complex from the 1940s; until the 1980s, it then became professionalized and expanded to the Western economies. Projects promise rational and efficient means to achieving successful, complex, singular goals that carry a high degree of uncertainty. For this purpose, an overall goal is broken down into a multitude of small sub-tasks that—in themselves—are manageable and relatively easy to complete. Thus, it is possible to manage and adhere to critical dimensions such as time, labor resources, quality, and budget.

Projects implicitly contain a normative promise that anything can be successfully managed when we make a project of it and properly apply the correct project management knowledge in the form of tools, processes, or strategies. Thomas saw a "prototypical example of the rationalization and technocratisation of management" (Thomas, 2006, p. 103) that is misconceived as a "panacea" (Maylor et al., 2006, p. 668). Projects are a means to achieving complex goals; and project management ensures the right tools are implemented and used correctly. However, this functionalist-positivist view masks profound ambivalences and ambiguities that make project failure a viable reality (Pinto & Kharbanda, 1996).

A central research topic is the organizational status of projects. In contrast to conventional, permanent organizations, projects are temporary in nature (Bakker,

2010; Bakker et al., 2016; Packendorff, 1995). Therefore, practices, processes, and interactions are more important when (re-)creating project and work organization than decisions and (permanent) structures (Kalff, 2018, 2022). Over the last 20 years, project research has developed from the so-called "waterfall model" of dependent subtasks to a more flexible approach. Digital software development has made a significant contribution to the conception and spread of adapted project management philosophies such as SCRUM and agile project management, which are currently the most well-known known models (Beck et al., 2001; Pfeiffer et al., 2021). Projects no longer proceed in a linear fashion from initiation, planning, and execution to termination —they are ongoing iterations of planning, testing, deployment, and adaptation to customer needs. The reflexive and processual practices of agile projects therefore require "care-work" to maintain social relations and organizational routines (Coban & Wenten, 2021).

The ubiquitous spread of project logic is obvious. On a meso scale, Midler (1995) coined the term *projectification* to describe the transformation process of the Renault Group to a product- and portfolio-based organization characterized by constant flexibilization and growing autonomy of organizational subunits around recurring model cycles. While Renault was not the beginning or the epicenter of the project logic, the impact of the processual terminology is obvious. To date, projectification goes beyond an organization level and has become a social dynamic that captures and transforms "everything" (Jensen et al., 2016). Therefore, a differentiation of the projectification dynamic is needed.

2.2. *Discerning different forms of projectification*

Perrow (1991) emphasized the role of organizations in modern life at all levels from the individual to groups that organize, to the entire society that is shaped and constituted by organizations. If projectification transforms the leitmotif of modern societies, then it is reasonable to think about projectified or project societies. In figures, projectification is evident in the increasing importance of project work at a societal level—Schoper et al. (2018) estimate that around 33 % of work is organized in project form in Germany, Norway, and Iceland. Furthermore, national and international institutions like PMI, IPMA or GPM professionalize project logic and disseminate project management knowledge to the rest of society and continue projectification processes (Wagner et al., 2022).

However, different forms of projectification exist and can be distinguished. Packendorff and Lindgren (2014) have highlighted the difference between narrow and broad projectification to express the social and societal dimensions of projectification. While narrow projectification is a mode of the operational restructuring of economic entities that adopt project forms, a broad reading of projectification transforms cultural codes. Cultural codes are metaphors of structuring and or-

dering that transcend corporate organizations, meaning that projects become, for example, metaphors of individual lifestyles and biographical responsibility (Kalff, 2016, 2017b). According to Packendorff and Lindgren, both narrow and broad projectification include a negative "evil cycle" (2014, p. 17) when competitive pressure and rationalization requirements spiral and increase effort, work, and stress, while also and heroizing performance and success. This "(re-)masculinisation of post-bureaucratic work practices" (Packendorff & Lindgren, 2014, p. 13) is the first indicator of the dark side of projectification.

In their literature study, Jacobsson and Jałocha (2021) established the chronological sequence of several forms of projectification and their growth over time. In three phases (1995-2008, 2009-2014, and from 2015), the authors identified four terms of projectification: projectification as a managerial approach, as a social trend, as a human state, and as a philosophical issue. While the first three examine the impact of projectification on individuals, organizations, and society, the philosophical reading describes a "metaphysical shift in the perception of time, space and work" (Jacobsson & Jałocha, 2021, p. 1597), which transforms individuals, organizations, and society alike.

Both contributions understood projectification, on the one hand, as being an organizational phenomenon, closely linked to corporate and market developments and directly interwoven with forms of work and organization. On the other hand, they saw projectification as a semantic shift. Project metaphors increasingly structure the individual identity of the self and constitute a form of late modern subjectivity. Thus, the dark side of projectification is present in work, employment, and organizations. Additionally, the dark side of projectification is a part of contemporary late modernity and late modern subjectivities. It governs and controls individuals, their conduct, and their life choices by making use of metaphors related to 'the project'.

2.3. *Inquiring into the dark side of projectification*

While the previous subsection dealt with different forms of projectification, this one outlines three strands of project research, before directly engaging with the dark sides of projects and projectification.

Geraldi and Söderlund (2018) identified three research strands regarding projects and project management: Type 1 research is concerned with efficiency and rationalization criteria for optimizing projects. Type 1 research identifies and holds on to objective success factors. Type 2 research, in contrast, analyzes social practices and their ambiguity. It challenges positivistic and efficiency driven instrumental project research and emphasizes the omitted social relations in projects. Projects are messy social settings where objective rational planning and organization reach their limits when confronted with reality. Type 3 research takes an emancipatory interest in projects and project management. This type of research criticizes deper-

sonalized power and domination relations, and seeks ways to achieve sustainable forms of work and organization. According to these classifications, type 2 and type 3 research address the negative or unintended side effects of projectification that could potentially amount to a dark side. Type 3 research in particular includes an emancipatory research agenda to rid from societal and organizational domination relations rooted in projectification. Such critical engagement was promoted by Cicmil et al. because "projectification is a complex ethical problem with consequences for long-term sustainability of organizations and society" (Cicmil et al., 2016, p. 59). Projectification, they argued, creates a specific temporality and efficiency orientation in organizations, society, and individuals that could be successfully mastered by positivist project management and its array of functional tools. Ultimately, however, the residual risk of failure is still an individual responsibility.

Two studies explicitly scrutinize the dark sides of projects and projectification. Aguilar Velasco and Wald (2022) identified environmental, organizational, project-specific, and individual factors that can potentially have stressful consequences for employees. Locatelli et al. (2022) defined that "[t]he dark side of projects is any illegal or unethical phenomena associated with projects" (Locatelli et al., 2022, p. 12). Accordingly, the dark sides range from individual misconduct in projects to illegal bribery in contracting processes and tendering procedures. Both studies conclude that too little is known about the dark side of projectification and projects, and thus project research needs to examine it more carefully. Both studies, nonetheless, showed that projectification can facilitate exhaustive work or misconduct. Ultimately, both studies look at individual effects that projects can exacerbate, however, they remained vague about how these negative consequences are the result of the structural logic of projectification. It is evident that there are many diverse perspectives on 'dark sides' when we examine projectification more closely. It can consist of illegal activities in and around projects like bribery in contracting processes, exploitative working conditions, or environmental degradation due to neglected standards or unsustainable projects per se. Although these are potentially related to projects at all scales, illegal and unethical behavior attracts great amounts of publicity in high-key megaprojects.

The goal of this article is to understand the dark side of projectification as a social premise that affects individuals as projectified selves. Therefore, this article uses a "broad conceptualization" of projectification (Packendorff & Lindgren, 2014) and follows the individualistic and philosophical interpretation of projectification (Jacobsson & Jałocha, 2021). Projectification can be a metaphor for a specific subjectivity that rearranges individual lifestyles in accordance with the "metaphysical shift" (Jacobsson & Jałocha, 2021) of temporality, spatiality, and work relations in neoliberal political economies. This subjectivity is the projectified self.

3. The projectified self and its origins in the structural effects of neo-
   liberalism

In this section, I will describe three main structural effects —flexibilization, responsibilization, and rationalization— that originate from the neoliberal transformation of contemporary economies and societies. In short, neoliberalism is a political agenda that sets up marketized patterns as a mode of governance. It restructures governments, institutions, and interactions to value, organize, and conduct social relations according to market modes of exchange (Cahill et al., 2018; Harvey, 2005). Rationalization, flexibilization, and responsibilization are effects of a neoliberal transformation and go hand in hand with projectification—they challenge society, organizations, and individuals while projectification promises a coping strategy.

Since the 1970s, organizations have acted in an increasingly complex environment and on volatile markets to meet individualized customer demands that require development and testing of highly specific products in accelerating innovation cycles. Organizations operate in an expanding sea of uncertainty that they can no longer control with conventional planning, managing or predictive techniques. Instead, organizations and society delegate coping with uncertainty to the individuals. While organizations increase individuals' autonomy and foster market orientation, employees increasingly engage in project work with growing individual responsibility (Bröckling, 2016; Pongratz & Voß, 2003). Individuals internalize the project logic and operate accordingly in business enterprises. On a societal level, individualized modes of governance rely on autonomy and market orientation: the emerging uncertainties experienced by individuals require self-management, self-organization and individual responsibility.

3.1. *Flexibilization*

The socio-economic changes described above have increased the need for flexibility (Masquelier, 2017, pp. 35-38). Since the 1980s, the rising importance of capital markets and financial motives (i. e., *financialisation*; Mader et al., 2020, pp. 6-8) has forced companies to follow short-term, financial market-oriented strategies with corresponding modes of corporate management like *shareholder value*. This has led to a growing need for flexibility in corporate organizations (Fligstein & Goldstein, 2022, p. 202). Flexibility counteracts market-induced uncertainty that arises from rapid and volatile market changes. Furthermore, innovations in digital technologies challenge work and organizational processes, and require flexible coordination and accelerated implementation processes in companies to adapt to technology in constant change processes (Kalff, 2019). Projectification tackles this uncertainty by providing temporary stability in organizations: projects attain a special status to carry out high-risk undertakings within a fixed time period, after which they terminate.

Agile project management is notable for the fact that it promises sustainable and efficient handling of flexible and rapidly changing projects in software development (Beck et al., 2001). In this context, rapidly changing customer requirements, constant trial and error iteration, and the incremental delivery of partially finished software quickly pushes the traditional 'waterfall model' of phased approaches to their limits (Lenfle & Loch, 2010). Agile project management institutionalizes iterative processes to streamline flexibility: the planning target is compared with actual states, customer ideas are integrated into the development processes through feedback loops, making planning flexible and adaptable. In consecutive sprints, the project creates incremental deliverables that are rolled out for productive use and feedback.

While organizations strive for flexibility and seek it in agility, individuals and society face comparable demands. Flexibility is becoming a fundamental constant of human existence: societal transformations loosen structures and make flexibility imperative for individual biographies and societal institutions (Sennett, 1998). Project logic becomes a mode of justification for individuals and institutions that are seeking time limitation, short-termism, flexibility, and prefer non-commitment over rooted social relations (Boltanski & Chiapello, 2007). Social acceleration condenses life events and makes the planning of rapidly developing events essential, leaving us in an ever-escalating pursuit of biographical episodes (Rosa, 2015). These biographical episodes can be of different, equal, or incommensurable quality but all need to be individually planned as sequences, in parallel, overlapping, with breaks or continuities. Retrospectively these episodes have to be legitimized as a biography. Education and training; multiple jobs and different job experiences; relationships with family, friends, and partners; and family planning —all become part of an increasingly complex life design that fractures the linear 'normal biography' into individual episodic projects in order to achieve unbound flexibility (Kalff, 2016, 2017a, 2017b; Tsiolis & Siouti, 2022).

3.2. *Responsibilization*

In neoliberalism, accountability guides the actions of individuals as well as institutional actors. Michel Foucault's works on neoliberalism (Foucault, 2008, 2009) and subsequent authors follow the idea that neoliberalism represents a "governmentality" technology of personalized and individualized modes of control. Instead of a top-down disciplinary domination of individuals in societies, neoliberalism installs conceptually 'free' citizens that are capable of acting as economic subjects: the *homo economicus*. Governing these subjects requires ensuring fertile soil for their freedom and providing guardrails for their behavior rather than dictating narrow boundaries of conduct (Foucault, 2008, p. 63). This is where neoliberalism increases the individual responsibility for individual action: Responsibilization

invokes a moral-economy of actions, which Shamir (2008) understood as a technology of governmentality as presented by Foucault. In neoliberal societies, specific conduct is no longer imposed by discipline. Instead, moral actors follow "guiding principles" because of "one's care for one's duties and one's uncoerced application of certain values" (Shamir, 2008, p. 7). For Brown (2015) responsibilization is an opaque form of domination that constitutes the autonomous neoliberal subject that takes responsibility for its actions. "[O]nly a moral agent understood as willing its actions can bear responsibility for itself" (Brown, 2015, p. 133).

For neoliberal subjects, the projectification of society leads to the juxtaposition of differently weighted responsibilities. The sheer singularity of responsibilities, such as an individual's own education and training, family and social relationships, career, and individual growth, are broken down by projectification. Projectification as a human state and as a philosophical issue, triggers varying responsibilities that are difficult to organize and can even be mutually exclusive. Individual career planning and family duties, such as being caring parents are only one example of this type of struggle—and are examples of "competing responsibilities" (Trnka & Trundle, 2014). Projectification however, offers means to compare the diverging responsibilities along specific metrics: Time spent, time available, costs, and projected (material or immaterial) benefits are examples of evaluation criteria that can guide responsible project selection and project execution.

Project management provides a set of tools to work with project logic: time and resource allotment are key to planning individual biographies, evaluating different projects, and adhering to project logic. Projectification is thus instrumental in constructing biographical identities, careers, and social relations in late modernity. Regarding responsibility, however, individuals are on their own: project fail when the incorrect tools are used, or the correct tools are used incorrectly. Failure is not a question of whether the tools in general are suitable or potentially defective. On the one hand, responsibility is shifted to individuals, but the causes of the implementation of projectification are systemic. The social changes in responsibility that suit project logic and include new forms of subjectivity might require a different definition of responsibility (Henkel & Andersen, 2015).

3.3. *Rationalization*

Rationalization is the core diagnosis of modern societies according to Max Weber. Weber described modernity as the progressive rationalization in a process of "disenchantment", in which scientific logic unveils the world and its societal and social relations (Jenkins, 2000; Weber, 1919/2004). Rationality and efficiency become the driving forces of progress and increasingly encompasses every part of society right down to the individual life world: interpersonal relations are increasingly shaped in accordance with efficiency and cost-benefit-optimization, giving them more and more an instrumental form.

Projectification fosters rationalization on two levels: organization and work. First, regarding organization, complex, unique projects are broken down into easy-to-oversee sub-goals that are easier to achieve. Projectification aims to efficiently use available resources, simplify complexity, and handle uncertainty by iterative processes. Secondly, projectification offers rational control strategies that, on the one hand, self-organize work on the project goal, and, on the other, manage project progress in multi-layered forms of control (Lenfle & Loch, 2010). This may seem paradoxical, as Sauer and Nicklich (2021) stated: self-organization is still imposed from the top, but, at the same time, self-organization exerts a new mode of control that is rooted in autonomy. Accordingly, individuals internalize rational control and planning, must organize themselves, and are responsible for the outcomes (cf. responsibilization).

Process control is replaced by a plan: A project is a planned procedure and the resources required are deployed as efficiently as possible in order to comply with the time scope of individual steps to successfully complete the project by the deadline (Kalff, 2022; Yakura, 2002). The planning processes and the plan are expressions of a rational approach to achieving a project goal. However, the path to the planned goal is not subject to close monitoring, as has been debated, for example, in Labor Process Theory: domination in the modern projectified production process is no longer a direct social relation between superiors and subordinates; it is internalized (Kalff, 2018). The deliverables of this project-specific production process must meet the clients' expectations and evaluations.

In this process, project management in projectified society takes on a significant role (Hodgson & Cicmil, 2006). Project management presents instrumental knowledge and professional tools for steering a project. Their instrumental character lends projects and their management a value-neutral status: applying project management or the project form to a problem give it a rational attribution and a progressive character.

Projectified selves use project logic to implement rationalization requirements in working life as well as in private life. Therefore, projectification is not limited to organizations and paid employment in the modern project-based production process —it extends to the whole individual life. This life needs an increased amount of planning and structuring input from the individual. Projectification offers a framework and the instruments that an individual needs to take responsibility for their own life. Therefore, projectification enables us to plan and manage our work and ourselves. However, projectification restricts the results to desirable outcomes and restrains subjects to rationalize their life plans (Lindgren & Packendorff, 2006).

4. The dark side of projectification for the projectified self

The projectified self is a neoliberal form of subjectivity and a response to three distinct yet interrelated structural transformations. To this end, subjects are granted comprehensive freedoms that empower them to act and make decisions in an autono-

mous, self-responsible and self-determined manner. However, the projectified self also relies on these three structural transformations since they pave the way for individual freedom. The result of these transformations is a form of subjectivity that adheres to the logic of projectification that means individuals can choose their own ways of life, to maximize human capital, and to provide liberal governance. Projectification and the projectified self are related to and preconditions for structural transformations in neoliberal societies in late modernity. To outline the dark side of projectification for society and individuals, a critical assessment of its subjectivity is needed. In the following section, I will discuss the three dimensions that concern the form of subjectivity, its role as a mode of justification, and its precarious qualities. While the impact of the dark side of projectification on projectified selves certainly extends to further fields, I consider these three as being the most important for understanding the dark side.

Subjectivity: This essay started with a quote from Michel Foucault that summarizes his epistemological interest in subjectivities and their production: Foucault's critique of particular historical or contemporary mechanisms of subjectification and subjectivities is not a normative judgment. These mechanisms are not 'bad' per se. Foucault's work is about the historical development of the subjectivity of the modern citizen. Projectification constitutes the projectified self that responds to the freedom that neoliberalism bestows. However, at the same time, projectification changes the dominant organizational form of social cooperation, social integration, and self-relations to emphasize time limits, and deadlines. Projectification reconceptualizes biographies and life stages as projects, suggesting that they are manageable and controllable by applying project logic.

Projectification provides the logic and the methods and techniques to manage the different emerging requirements. The projectified self is, in principle, free to do and leave as he or she likes, but projectification controls and normalizes the variance of this freedom. This means projectification allows for deviation from standard biographies in an acceptable tolerance range. For example, subjects arrange education, vocational qualification, career entry, gainful employment, family or other interpersonal relationships in an ad hoc manner. Nonetheless, social expectations structure individual episodes in biographies: students, for example, are encouraged to study as quickly and efficiently as possible to seize opportunities on the job market, while free time and leisure are also integrated into planning when they promise benefits for individual development.

The projectified self must use the freedom he or she is entrusted with and invest in a 'productive' biography. Therefore, economic logic of projects becomes the benchmark for evaluating biographical elements. The dark side of projectification lies in the controlling of individual behavior to permanently string together new, value-increasing projects. In this process, life is cast in the form of a project and becomes one-dimensional. Life design projects abound —and individuals pattern their lives accordingly, in rational, flexible ways.

Justification: Projectification and its form of subjectivity, the projectified self, serve as a mode of control of individual freedom and biographical choices. Additionally, it provides a comparison of the value and valuation of individual decisions and life choices (Boltanski & Chiapello, 2007; Boltanski & Thévenot, 2006). Projectification establishes a coherent and meaningful narrative out of fragmented and disrupted —projectified— biographies to construct individual identities. Moreover, a project-based biography also legitimizes flexible life design. Boltanski and Chiapello see projects as archetypes for a new spirit of capitalism that rewards flexible, active lifestyles (Boltanski & Chiapello, 2007). In the "projective city" (Boltanski & Chiapello, 2007, p. 107), the emphasis of individual lifestyles is placed on temporariness, flexibility, and networking, where subjects are active and seek consecutive projects. The projectified self's lifestyle resembles those of nomads and devalues fixed and permanent ties, while valuating loose, unattached and uncommitted social relations (Boltanski, 2006, p. 26).

Projectification —as a metaphor of a change of "human state" as well as an existential "philosophical issue" (Jacobsson & Jałocha, 2021) — shifts the basis of life and the self-understanding of the projectified self. Value is ascribed to or revoked from projects and those responsible for them, depending on whether a project promises a return, success, or progress, while cost, failure, or irrelevance make it difficult to justify a project. The projectified self has to prove his or her value, and does so with their projects. When value determines the choice of projects and the desired outcomes, the projectified self operates in a spiral of cost-benefit-optimization, self-improvement, efficiency, and growth (Berglund et al., 2020).

The dark side of projectification comes into play when projectification proposes the only viable justification mechanism to evaluate our actions. Justifications that refer to projectification foster the qualities of projects: temporariness, short-termism, deadline-driven activities and decisions while uncertainty and complexity on organizational or societal levels are becoming the responsibility of individuals. The projectified self expresses the circumstance that only project-specific structures are of value (Berglund et al., 2020; Boltanski, 2006; Boltanski & Thévenot, 2006). This perspective originates in the works of Boltanski and Thévenot who discerned six different *worlds of justification* (2006, pp. 159–211): the inspired, the domestic, the world of fame, the civic, the market, and the industrial world —later complemented by the "projective city", a world of projects (Boltanski & Chiapello 2007, pp. 107–128). These worlds provide different contexts to ground arguments and critique: for example, being a caring parent is of higher value in the domestic world that emphasizes dependence and relations to others (Boltanski & Thévenot 2006, p. 164), while family obligations limit flexibility and thus are of lower value for the projectified self of the projective world (Boltanski & Chiapello 2007, p. 122). The dark side of projectification lies in the dominance that the projective city has attained to the

point where it overshadows any other world to justify life-decisions. Then, only one valid question remains: does it serve your projects or not?

Precarity: The structural transformations and their reciprocal relations with projectification favor disruptive lives that represent a "metaphysical shift in the perception of time, space and work" (Jacobsson & Jałocha, 2021, p. 1597). Flexibility dissolves the static temporal and spatial context for biographies of projectified selves and imposes temporariness and boundarylessness of life choices. Work and occupation are increasingly projectified, and thus temporary —a condition that is particularly evident in employment in academia (Dollinger, 2020). Flexibility is a catalyst for precarity when it disrupts the planning of individuals. There is a growing need for the projectified self to adapt to short-term projects and this is accompanied by a continuous urge to 'start over' under new or changed preconditions (Masquelier, 2017, pp. 38-39).

The freedom that neoliberalism concedes to individuals has its limits when it concerns aspects of life that cannot be influenced by the individual. While, for example, welfare states individualize the risks of unemployment and call on individuals to invest in their employability, structural unemployment lies outside the sphere of individual influence. Risks are systemic while responsibilities are individual (Henkel & Andersen, 2015).

The structural transformations caused by neoliberalism —especially the act of responsibilization— increase the vulnerability of individuals to precarious situations. The dark side of projectification is its inherent focus on flexibilization and responsibilization that creates uncertainty for the projectified self. The aim of the structural transformation was to 'outsource' that uncertainty from organizations to the individuals, resulting in growing vulnerability to precarity in life designs of individuals.

<p style="text-align:center">*   *   *</p>

The dark side of projectification as a human state and as a philosophical issue presents itself as an opaque social dynamic. First, projectification, understood as being a response to neoliberal structural transformations produces a specific form of subjectivity: the projectified self. This subjectivity is the key to the dark side of projectification focused on in this essay: flexibilization, responsibilization, and rationalization generate requirements for individuals that they fulfill by organizing their lives and endeavors in the form of projects. However, with this projectification and the projectified self, new challenges arise. First, in neoliberalism the subjectivity of the projectified self is a mode of control for rationalizing human behavior. Second, projectification and the projectified self serve to justify individual biographical decisions and how these biographies are organized. The dark side of projectification lies in the dominant valuation of projects above other forms of structuring lives and biographies. Only projects, then, promise value. Third,

projectification increases the vulnerability of the projectified self to precarious conditions in work and private matters, because projectification causes disruption of temporariness and short-term orientations that contradict continuity.

Projectification proposes tools for specific but also very general contemporary social problems. Individualized responsibility for life choices resonates with a project logic that offers the projectified self the tools and techniques for mastering their own projects. Critical social science, especially critical theory, has made a strong case for the fact that tools, instruments, and, more generally, instrumental reason are not apolitical, but embedded in the social context as part of power and domination relations. The dark side of projectification lies precisely where this embeddedness is obscured and social relations are rendered invisible—when projectification appears to be a factual constraint without an alternative. The factual constraints then need to be highlighted to offer insights where they suggest necessity for projects as a "panacea" and where these promises remain empty and potentially threatening for neoliberal individuals.

5. Projecting the future of projectification

Projects have long been a research topic limited to corporate contexts. Individual projects, programs, and portfolios were of interest in companies managed by project professionals. Only recently has research addressed the expansion of projectification from management and the corporate world to society as a whole and into every domain of private life. Projects are currently a contemporary description of society and its functional approach towards work organization (Lundin, 2016). However, what a "post-project society" (Lundin, 2016, p. 13) would look like remains to be seen. What the dark side of projectification is depends on the perspective we take on projects and project management—and thus on different notions of projectification. The dark side can be potentially exhausting working conditions that make employees and workers vulnerable, and negatively sustain lifestyles that force individuals to constantly optimize and compare their 'worthiness'.

This essay has been concerned with the questions of the structural effects of projectification that affect the projectified self. It has sought to describe where the dark side of projectification lies for individual. Projectification is a change in human states and a philosophical issue (Jacobsson & Jałocha, 2021), which transforms our social relation with others, with work, with our private lives, and with ourselves. In late modernity, social sciences are epistemologically interested in the social effects that favor and drive changes like projectification: e.g., flexibilization, responsibilization, and rationalization. In these social effects, an instrumental character can be discerned that sustains different ways of working and living so that growth, surplus, and efficiency can be achieved. In a neoliberal society, therefore, the instrumental aspects of projectification urge subjects to act and behave accordingly.

However, the dark side of projectification undoubtedly affects working conditions, and new insecurities, as well as morally questionable or reprehensible practices, are also visible in late-modern and neoliberal thought. On the one hand, the structural effects of flexibility, responsibilization, and rationalization aim to create a degree of individual freedom, with which they are mutually intertwined. On the other hand, the structural effects are rooted in freedom, and they also make freedom possible in the first place.

The expansion of projectification needs even more intensive research on its structural causes and its specific effects at all levels—in organizations, in society, for individuals, as well as in 'metaphysics'. This expansion also includes the patterns of legitimacy with which the projectified selves justify their own projects and how people justify their use or rejection of the project form. The instrumentality of projects—they are tools for solving different problems—posits that projects and projectification are value neutral, which makes understanding their dark side challenging. However, as this essay has argued, by scrutinizing the structural transformations of contemporary societies, we can find points from which we can start to understand how individuals or institutions justify projectification as a reaction to social and societal changes.

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CHAPTER 10

Projectification and Project Management Associations

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Abstract

This chapter aims to provide insights into the role of project management associations in the projectification of society from an institutional theory perspective.

The content of this chapter is based on a mixed methods approach. It draws on the research proposals available in the bibliography as well on recently conducted qualitative studies in some countries as national associations.

The results indicate that the projectification of societies, at least in most countries with more advanced economies, is progressing and continuing to grow. The economies of these countries play a leading role in projectification, which resonates with other sectors of society. The actions of project management associations have only an indirect influence on the projectification of society, which cultural–cognitive institutions are mediating. Both findings are novel when compared to the existing literature.

Taking an overall view of the findings, project management associations have gained a better understanding of the projectification process and important guidance on their role.

Other results obtained regarding social implications can offer interested parties intriguing insights into the contemporary phenomenon of the projectification of society, along with information on its current state and future evolution.

Finally, the application of institutional theory to the projectification of society in the framework of this contribution enables an in-depth analysis to be carried out of the underlying social processes and interactions between the regulative, normative and cultural–cognitive activities of project management associations on the one hand, and institutions on the other hand, at a societal level. This opens up new and promising perspectives for further research.

Keywords: projectification, society, institutions, institutional theory, Project management associations.

1. Introduction

Since the 1960s, project management associations have taken on an increasingly important role in advancing the knowledge necessary for managing projects (Morris, 2013), in spreading the idea that professional management enables projects to be implemented more efficiently, and in qualifying and certifying project personnel under accredited systems (Hodgson & Muzio, 2012). Nowadays, project management associations can be found regionally (e.g., Hong Kong Institute of Project Management), nationally (e.g., Spanish Project Management Association AEIPRO), and internationally (e.g., International Project Management Association (IPMA)) They can also be found in specific industries (e.g., International Construction Project Management Association) and subject areas (e.g., International Institute of Legal Project Management), even though the degree of maturity of each professional association varies greatly. For example, the Association for Project Management (APM) has achieved massive recognition by obtaining a Royal Charter (Hodgson et al., 2015). In contrast, project managers and many national associations in project management have not yet received government recognition for what they do in project management (Nicklich et al., 2020).

Projects have enjoyed increasing popularity in recent years and are particularly utilizedin the economy as a temporary form of organizing complex undertakings or introducing change, innovation, or new ventures (Auschra et al., 2019). Especially in times of serious societal challenges, such as the climate crisis or the COVID-19 pandemic, there is growing demand to meet these challenges sustainably by using projects and project management (Cerne and Jansson, 2019). While research has extensively explored the increasing prevalence and use of projects in the corporate world (Maylor and Turkulainen, 2019), empirical research at a societal level is still lacking (Soderlund and Sydow, 2019). In particular, there are questions about what can be done to scale project management concepts practiced in business to other sectors of society (Bogacz-Wojtanowska and Jalocha, 2016), and what role project management associations should play in this process (Wagner et al., 2021).

The research on the increasing prevalence of projects in corporations started with Midler (1995), who, with research based on a longitudinal study at the automobile manufacturer Renault, found that over time the number and importance of projects increased significantly, and this also had an impact on the organizational structure, culture, and teamwork in the corporation. He coined the term "projectification" to describe this phenomenon. However, the diffusion of projects is going beyond the corporate world into other areas of our society. Jensen et al. (2016) even speak of "the projectification of everything", implying that projects are

omnipresent in business and society and everyone's lives. Regarding management and organizational sciences, sociology, and institutional theory, analysis has focused on the interactions of temporary and permanent organizing within and across organizations and project networks (Lundin, 2016; Sydow and Windeler, 2020).

Scott (2008a) emphasizes the embeddedness of organizations in an institutional environment that molds social behavior and ensures stability and predictability through a variety of rules, norms, and cultural-cognitive imprints. Here, institutions are understood as being social structures composed of regulative, normative, and cultural-cognitive elements that, with associated activities, mold behavior onto a specific trajectory (Scott, 2010). Project management research has engaged institutional theory primarily in projects (Soderlund and Sydow, 2019) and in the context of project-oriented organizations (Scott, 2012). However, applying this theory to the topic of societal projectification has yet to occur. how projectification occurs at this level, which actors are involved, and what role institutions play in this process are still unexplained (Scott, 2008b; Barondeau and Hobbs, 2019). Professional associations, such as the German Project Management Association (GPM), seem to be important actors in the projectification of society, as they foster the creation, maintenance, or disruption of institutions (Lundin et al., 2015). Therefore, further research is needed to better understand how projectification unfolds at a societal level.

2. Theoretical grounding

Using the the "Scandinavian School" as a starting point, research in recent years has increasingly focused on the embeddedness and interactions of projects within their context (Jacobsson et al., 2016). A project is understood as being a temporary organization with specific objectives, such as the development of a new product or the redesign of an organizational unit, whereas a process builds on previous activities and embraces dynamic change (Bakker et al., 2016). It is argued that "projects have become intrinsic to our lives" (Jensen et al., 2016, p. 22). They are carried out by various actors who enter into relationships that "are dissolved and reconfigured through the practice of episodic project collaboration" (Henneberry and Parris, 2013, p. 231). The realization of projects is affected by the institutional context, which at the same time exerts an influence on their immediate and broader environment (Soderlund and Sydow, 2019).

2.1. *The projectification of society*

On the one hand, the projectification of society can be understood as being a process or development towards the increasing importance of projects in broad areas of society (Munck af Rosenschold, 2019). On the other hand, it "indicates an interest in the outcomes and consequences of projectification on parts of the

society or on society at large" (Jacobsson and Jalocha, 2021, p. 1593). It has become generally accepted that projectification extends beyond boundaries of organizations.

2.2. *The application of institutional theory to projectification*

Thinking about projectification as a wider concept, from the narrow conceptualization of projectification as an organizational transformation, as described by Midler (1995) and Söderlund and Tell (2009), to *"an interest for cultural and discursive processes in a society in which notions of projects are invoked"* (Packendorff and Lindgren, 2014, p. 7), projects are characterized as being constitutive elements of social life. Different actors coordinate their joint activities in temporary networks to meet again later in other constellations (Boltanski and Chiapello, 2018).

The Institutional theory seems to be better suited for understanding the process of projectification from a broader perspective, as it "considers the processes by which structures, including schemas, rules, norms, and routines, become established as authoritative guidelines for social behavior" (Scott, 2005, p. 461). Institutional theory allows a comprehensive view to be taken on the actors with their relationships and joint activities in an established, institutional context (Healey, 1992). With the application of this theory, both the effect of the institutions on the social process and the reverse effect of the institutions on the process can be analyzed.

2.3. *The role of professional associations on projectification*

Scott (2010, p. 13) indicates that "in all fields, a diverse set of 'intermediaries' evolves to facilitate or broker exchanges, or to collect, organize and evaluate information so as to affect interaction among the 'principals' ". As an example of such intermediaries, he points to professional associations and professionals as "institutional agents" (Scott, 2008a, b, p. 219). Morris and Geraldi (2011) also refer to professional associations, notably project management associations, when it comes to shaping the institutional environment of projects. Project management associations, together with associated professional service providers (e.g., PM consultants, trainers, and coaches) and professionals, have a stabilizing capacity and are supposed to affect the projectification of society positively.

For example, by using regulative actions, an association can exert influence on the environment, and respective institutions, in which it operates, such as by using the support of legislation in the development of laws and regulations that affect project-related work and, in turn, affect the dissemination of projects. The normative actions of project management associations are often aimed at developing project-related standards that are utilized for qualifying and certifying professionals. Finally, cultural-cognitive actions aim to disseminate shared beliefs and practices

based on previous projects or role models (Muzio et al., 2013). Hence, we propose that the actions of project management associations will positively influence the projectification of society, and we derive the following three hypotheses from this proposal (Wagner et al, 2021):

—H1. A project management association's regulative actions positively affect the projectification of society.

—H2. A project management association's normative actions positively affect the projectification of society.

—H3. A project management association's cultural–cognitive actions positively affect the projectification of society.

The role of project management associations is viewed rather critically due to their interest in maintaining the status quo rather than making advances (Hodgson et al., 2015). This criticism is also due to the fact that their primary focus is on corporations, which gives priority to their specific interests, and they thus lose sight of broader societal considerations (Muzio et al., 2011).

The state of development of project management associations differs from country to country. The Association for Project Management (APM) in the United Kingdom, for example, was awarded Royal Chartership in 2017, which provides special recognition to the project profession and opportunities for the association that has championed its cause (Hodgson et al., 2015). However, this situation is unique and cannot be easily imitated by associations in other countries. The situation seems to be quite different at the Project Management Institute (PMI) in the USA, at the Istanbul Project Management Association (IPYD) in Turkey, the German Project Management Association (GPM) in Germany, and the Spanish Project Management Association (AEIPRO) in Spain.

Many national associations have not yet been granted status as fully-fledged professional associations (Nicklich et al., 2020), and they are striving to gain traction by offering different services, such as training and certification. They have traditionally relied on the networking skills of their members, exchanging experiences, and sharing stories of successful projects. Great emphasis is placed on education, ranging from secondary school and vocational training to advanced project management courses at universities and corporations (Wagner, 2009).

The entanglement and interrelation of the activities of project management associations with institutions and other actors have been explored in different places, for example in Italy (Sabini and Paton, 2021). This study shows that the path toward projectification was first attempted by the government using regulative actions. Later, mainly because of the the influence of international associations, the European Union, and economic pressure, normative actions were used, such as the establishment of project management standards. Hence, how the actions

of a project management association on the path towards the projectification of society unfold depends on existing societal institutions. (Sabini and Muzio, 2017).

The following hypotheses reflect these thoughts:

—H4. Societal institutions mediate the effects of the actions of project management associations on the projectification of society.
—H4a. Regulative institutions mediate the positive effect of regulative actions on the projectification of society.
—H4b. Normative institutions mediate the positive effect of normative actions on the projectification of society.
—H4c. Cultural– cognitive institutions mediate the positive effect of cultural– cognitive actions on the projectification of society.

In conclusion, it can be stated that, in the literature, the increasing dissemination of projects has so far been mainly acknowledged in the context of the corporate world, and only in recent years has it been explored at a societal level. Empirical analyses, however, exist only for the economy (Henning and Wald, 2019). Other sectors of society, such as society at large, still need to be examined. A more detailed empirical analysis of which actors impact which institutions and how this affects the projectification of society has not been undertaken yet (Wagner et all, 2021).

The literature attributes an important role to project management associations for the professionalization of project management and the dissemination of projects in general (Muzio et al., 2011). Nevertheless, how project management associations exert their and how strong this influence is compared to that of other actors remains unclear.

2.4. *A critical view of professional project managements associations and projectification*

The development of the discipline of project management is closely linked to the engineering projects of the defence and aerospace industries established after the end of World War II. These industries were tasked with solving complex problems using mathematical computation models based on operations research (Morris, 2013). Projects and project management are accepted in many economic areas and increasingly in society, and they are now part of everyday life (Hodgson & Cicmil, 2006).

Professional bodies have supported the dissemination of projects with the development of a body of knowledge (BoK), which describes the essential steps of project management from the initiation of a project to its completion from a procedural or methodological perspective. This can be seen as an attempt by national associations with high levels of international influence to establish an entry barrier or training prerequisite which is another step towards professionalizing their

field of practice with a description of what is required and drawing the boundaries between members of the project management profession and other professions (Morris et al., 2006).

Project managers offer a service in their organizations and often must justify what enables them to bring projects successfully to the finish line. Belonging to a professional body and having acquired the knowledge outlined in a specific BoK, and possibly even proving that they have the appropriate certification, gives them a legitimacy that helps their work to be better recognized. However, the orientation of BoKs is also viewed critically. One particular issue is that the knowledge is summarized in concise books and prepared in a very undifferentiated manner. Above all, it has been mentioned these books are not really based on research results, and that if they were, the BOKs would be considered to be more legitimate (Shepherd & Atkinson, 2011).

Even if other professional bodies have taken different paths in the development of process models, the basic ideas for the management of projects are still represented today in literature, national and international norms and industry-specific standards in such a way or similar to a BoK. In terms of content, today's BoKs are criticized for focusing too much on the execution of projects and paying far too little attention to their framework conditions, the process of initializing and clarifying objectives, and achieving social integration. This plays an essential role in RPM, in particular. Aspects of sustainability for the management and governance of projects, programs, and portfolios were incorporated into the development of the ISO 21500 series of norms, The IPMA member associations decided on a different path in the 1990s (Pannenbäcker, 2001). They opted for a competency-based standard that today, with the fourth version of the IPMA Individual Competence Baseline (IPMA ICB defines the competencies for managing projects. This baseline covers three areas of competence: practice competencies, people competencies, and perspective competencies. Aspects of sustainability have also been considered (Silvius, 2017), although Shepherd and Atkinson's criticism (2011) concerning the lack of scientific foundations also applies to the ICB.

Together with the development of the norms and standards for project management, the professional bodies successfully established and marketed offers for the qualification and certification of project personnel. Together with developing the norms and standards for project management, the professional bodies successfully established and commercialized offerings for qualification and certification. Although the basis for such offerings is a different BoK or competence baseline in each case, it helps the professional bodies to generate revenue to finance other voluntary activities.

At the same time, qualification and certification attract new members, meaning that today associations today reach out to several million project managers globally. Academic research on the value of certification for project managers has found a

more indirect relationship between certification and performance on projects (Blom-quist et al., 2018). However, project managers and their employers benefit from increased self- confidence and professionalism on projects (Farashah et al., 2019).

Another criticism of project management associations is their one-sided focus on the world of business. As an emerging profession, they are concerned with marketing their services and thus benefit businesses (Muzio et al., 2011). This might include the promise of greater efficiency through the application of project management, greater effectiveness of project managers through granting credentials, or, generally, giving a company a more professional image with membership of a professional body. The main criticism here is that the professional bodies in project management "would only preach to those already converted" and would completely disregard innovative or even societal fields of application (Wagner et al., 2021). This is reflected in their membership, which primarily consists of individual project managers and corporate members and their links across societal groups. As a result, only in a few exceptional cases do the project management bodies support civic or grassroots environmental groups, development aid initiatives, and community projects.

3. PROJECT MANAGEMENT ASSOCIATIONS AND SOCIETAL PROJECTIFICATION RESEARCH: THE CASE OF GERMANY

Wagner et all 2022, address this issue, focusing on the structural model collinearity assessment by a value inflation factor.

The regulative actions of project management associations display no significant direct effects on the projectification of society. Thus, hypotheses H1, H2, and H3 are not supported by research. Instead, significant positive effects of the actions of the Project Management Associations-PMAs on their respective institutions can be found, which presents the necessary conditions for the proposed mediation effects in H4.

Finally, Wagner's research addresses, looking to validate the mediation hypotheses, the direct and indirect effects of the actions of the PMAson the projectification of society were investigated. The direct relationship of the actions of the PMAs on the projectification of society were not significant.

Hence, according to Zhao et al. (2010), the results indicate full mediation for the effects of the regulative and cultural–cognitive actions of the PMAss, while the normative actions do not affect the projectification of society directly or indirectly. Therefore, the results support the hypotheses in H4a and H4c, but not in H4b .

3.1. *The interplay of institutions and project management associations*

While institutional theory has so far been applied primarily in the context of projects (Söderlund and Sydow, 2019) and project-based organization (Narayanan

and Huemann, 2021),in the present contribution, this theory has been connected to the process of projectification at a societal level (Wagner et all, 2021).

Institutional theory has been used as an explanatory model to examine the interactions between institutions and actors and how they each, alone and together, influence the process of projectification. Particular attention has been paid to the role of project management associations.

While the literature (Scott, 2010; Lundin et al., 2015) suggests that project management associations have a considerable level of influence on the projectification of society, the previously mentioned hypotheses 1 to 3 have been used to examine whether the regulative, normative, and cultural–cognitive actions of project management associations affect the projectification of society. Surprisingly, these three hypotheses could not be confirmed. This means that the actions of project management associations do not directly influence projectification. One explanation for this finding could be that other organizational actors (i.e., leader companies) have a more significant and direct influence on the process of projectification than the project management associations, and that the activities of the latter do not reach society as a whole. Another explanation could be that the activities of the project management associations are not effective enough. This idea is consistent with the analysis of secondary data on the strategic direction of the German Project Management Association-GPM, which, to date, has not explicitly focused its activities on the common good and supporting society (Wagner et all, 2022).

However, results show that the actions of project management associations have an indirect effect, i.e., via the mediating institutions on the projectification of society. In this context, actions targeting cultural–cognitive institutions exhibit the highest impact on projectification, followed by actions targeting regulative institutions. Hence, hypotheses 4a and 4c have been supported by research, whereas the path via the normative institutions is not significant, and thus, hypothesis 4b is not supported by research. Moreover, the results suggest that the coercive regulations and dominant norms do not foster the diffusion of projects as the GPM intends. Instead, they primarily foster the understanding of the purpose, the corresponding values, and the belief in projects as a means of achieving ambitious goals. Altogether, this contrasts with the prevalent view in the literature, which has previously assumed that projectification occurs primarily through regulative and normative actions and institutions, such as governments passing laws and regulations (Sabini and Paton, 2021), or project management associations issuing a body of knowledge for certifying project personnel (Hodgson, 2002).

Unlike the prevailing view in research (Hodgson and Muzio, 2012) that the project management associations primarily exert influence on the projectification of society through normative and regulative institutions, these results reveal new modes of interaction. In particular, the study expands its scope to include actors

such as ider enterprises and entrepreneurs who, in direct comparison, have more influence on projectification than the associations do because they positively shape the image of projects and are more likely to convince other actors of the importance of project management by setting an example.

A key contribution of this research is that the projectification of society can be explained through the lens of institutional theory as a social process involving interactions between actors, their actions, and societal institutions. Institutions take on a mediating role, reinforcing the activities of actors and thus exerting influence on projectification. In particular, the results identify the direction and mode of effect that the actions of project management associations have on the projectification of society via certain institutions.

Furthermore, it has become clear that the process of projectification is ongoing and can be supported by purposive actions. Since the focus of this study has been project management associations, they could reconsider their strategic positioning and support projectification with intentional actions based on these findings. Moreover, the results of this research provide those responsible at all levels of society with insights into an important phenomenon that requires appropriate responses, especially in times of societal challenges such as the climate crisis.

This study is the first empirical application of institutional theory to the process of projectification at a societal level that focuses on fundamental relationships. Future studies could examine the processes of projectification in more detail, taking other actors into account, such as leader enterprises or entrepreneurs (Lundin et al., 2015; Kalff, 2017). For instance, structural equation modelling could be utilized to determine whether these actors contribute directly or indirectly to the projectification of society and what role institutions play in this process.

4. Some conclusions and forward paths

In this chapter, the potential that project management associations have in times of major challenges, such as the pandemic or the worsening climate crisis, have also been highlighted. For example, the associations could increase the connections they have with societal groups outside the economy and work with them to develop solutions to the above-mentioned challenges. Clear pointers for a new direction have been provided, especially in item 3 above. For example, project management associations can be much more effective if they use cultural–cognitive actions, e.g., by promoting the image of projects or disseminating success stories that encourage others to follow suit. In this respect, I would like to invite the reader to open the door and decide to explore the projectification at a societal level further, as it has both theoretical and practical implications.

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CHAPTER 11

Projectification and Professional Certification

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Abstract

The purpose of professional certification is to establish a standard of knowledge and expertise in a particular profession, and to provide a means for individuals to demonstrate their competence to employers, clients and society at large. Professional certification systems have been widely developed in the project management profession and are an essential tool for increasing the qualifications of project managers. These systems are also used to promote both individual competence and the maturity of organisations that develop and implement projects, and they can therefore be instruments that provide support to improvements in the efficiency of resource use and the acceleration of the process of the projectification of society.

Keywords: Professional certification; Project management; Professional certification systems; Project management maturity and projectification.

1. Introduction and objective the chapter

The objective of this chapter is to study professional project management certification systems, their characteristics, advantages, weaknesses and possible drawbacks in order to determine their potential contribution to the process of the transformation of industry, companies and society in general, which is known as projectification.

Professional certification in project management is analysed as a specific case of the existing professional certification for all professions.

Its origin and evolution, its advantages and disadvantages, its applicability to different professions and its relation to the conformity assessment framework are analysed.

This is followed by an analysis of the different existing project management professional certification systems, the institutions responsible for their development and operation. A discussion of their contribution to the level of success in project development and execution is included, as well as what they bring to the project management discipline and profession.

Finally, the way in which professional certification systems in project management can contribute to the process of the projectification of society is presented.

2. PROFESSIONAL CERTIFICATION

2.1. *Concept and definition of professional certification*

Professional certification is a process by which a qualified institution or body assesses and verifies an individual's skills, knowledge and/or competencies in a specific profession or activity.

This process generally involves an examination or assessment to measure the individual's proficiency in that activity. Once it has been demonstrated that the individual meets the requirements set by the institution or body with the capacity to conduct such an assessment, he or she is awarded a certificate validating his or her skills and knowledge in that area.

Professional certifications are usually awarded by professional organisations, industry associations or other bodies that are recognised by the government or the market as authorities in a particular field. The certification process may involve meeting certain prerequisites regarding education or experience, passing an examination, submitting a portfolio of work, or completing other types of assessments.

The reasons why a person decides to seek professional certification are very varied, ranging from improving employability to improving professional self-esteem. This motivation is a fundamental aspect that will be discussed in detail below. In addition, in some professions, certification may be required in order to practise or work in specific roles or jobs.

2.2. *The origins, evolution and implementation of professional certification*

Professional certification systems have evolved over time as a means of establishing levels of competence and standards of professionalism in various fields. The origins of professional certification date back to medieval guilds, which were established to regulate and control the practice of various trades and professions. In the 16th and 17th centuries, state-recognised professional associations appeared in fields such as medicine and law, and in the 19th century the same was true for more recent professions such as engineering. These associations established codes of ethics and standards of practice for their members and, in some cases, began to offer specific training schemes, and later certification programmes, to recognise

individuals who had demonstrated a certain level of expertise and competence in their field.

Today, professional certification systems have become more formal and standardised, combining educational requirements, demonstration of experience and theoretical and practical tests designed to ensure that certified professionals perform adequately in their professional field. The number of professional associations and independent organisations has multiplied, and there is strong competition in terms of the certifications offered. (Guerrero-Chanduví et al., 2010).

The professional activities in which the implementation of a professional certification system may make sense or be useful are those in which there is a need to establish trust, guarantee competence and differentiate between professionals. Professional certification systems have achieved the greatest growth and recognition in areas such as in healthcare, education, accounting and finance, real estate, engineering, information technology and project management, which is the main focus of this chapter.

However, there are professions in which developing a professional certification system is more difficult. For example, in professions that are highly subjective and difficult to measure, such as the creative arts, developing an assessment procedure that accurately reflects a person's talent, skill or experience is not easy. Similarly, in professions that are highly specialised and with a small number of practitioners, establishing a certification system that is widely recognised or accepted may be difficult or impractical.

2.3. *Benefits of professional certification.*

Professional certification schemes offer a wide range of benefits for different stakeholders, including individuals, companies and organisations and the professional community at large.

Some of the main advantages of the implementation and extension of professional certification systems are that they:

- Demonstrate experience, credibility and competence in a given field.
- Improve career opportunities and salary expectations.
- Promote good practice and improve the performance of an organisation.
- Facilitate the advancement, development and prestige of a profession.
- Improve public safety and security in critical professional activities.

It is of interest to rank the benefits of professional certification according to the actors targeted, as shown in Table 1.

Table 1Ranking of the advantages offered by professional certification

Stakeholders who benefit	Types of benefits
For individual professionals	• Differentiation: A professional certification (C.P.) can help differentiate a professional from other non-certified professionals and increase his or her visibility in selection processes. • Professional development: A C.P. can provide a set of tools and techniques that the professional can apply to their daily work. It can also help professionals to keep up to date in their field and improve their skills and knowledge. • Recognition: A C.P. can provide recognition for the skills and knowledge acquired by a professional. This ***recognition can be national or international depending on the nature of the certifying organisation.***
For companies and employing organisations	• Confidence: A C.P. can generate confidence (internally for the organisation, and for customers) in the qualifications and competence of an employee or candidate (Turner & Müller, 2003). • Quality improvement: By hiring certified professionals, companies can standardise and improve the quality of their products and services. • Compliance with standards: Companies can demonstrate compliance with specific standards by hiring certified professionals.
For contracting companies and organisations (customers) and for the general public	• Confidence: Clients, and the public in general, can be more confident that the services provided by certified professionals are of adequate quality, and in accordance with best available practices. • Protection: A P.C. system can help protect the public by ensuring that professionals meet certain standards of competence.

These benefits have been found to require professional certification to ensure that practitioners keep their knowledge up to date and apply existing best practices in a profession. Therefore, a professional certification cannot be valid indefinitely and mechanisms are required to ensure that certified professionals have not ceased to practice a profession. This justifies the need for professionals to periodically undergo recertification processes in which they provide evidence that they are still active in the profession and are involved in professional activities in which they update and develop their skills and knowledge.

2.4. *Requirements for a professional certification system*

For a professional certification system to be truly useful and add value to the development of a profession, it must have the following characteristics:

- Possess clear, robust and well-defined standards that reflect the knowledge, skills and competencies required for the successful practice of the profession.
- Be rigorous and demanding, so that candidates have to demonstrate a high level of mastery and competence in their field.
- To be recognised by employers, clients and other stakeholders as an indicator of reliability and professional standing.
- Be up-to-date with the latest trends, developments and best practices in the industry.
- Promote continuous learning and development among certified professionals.
- Guarantee the rigour and impartiality of its procedures for assessing, granting, maintaining and withdrawing certification, which all contribute to public confidence in the system.

Professional certification systems are often established and developed by professional bodies and associations, but there is also the potential for them to be created and managed by independent institutions. While professional associations can provide valuable certification systems for their members, independent certification organisations can provide an alternative option for professionals who may not be members of a particular association or who may be seeking additional certifications beyond those provided by their professional association of reference.

2.5. *Inconveniences or undesired effects of professional certification systems on a profession*

While professional certification systems offer many advantages, there are also some potential drawbacks or side damage that the extension of professional certification systems can cause to a profession. Some of the main criticisms of these systems are:

- Creating barriers: Certification can be time-consuming and costly and can create barriers for those with fewer resources, reducing diversity and inclusion in the profession and preventing appropriately skilled people from entering the profession.
- Stifling innovation: Professional certification systems can be slow to adapt to changes within a discipline, which can slow down innovation, and certified professionals are less likely to adopt new practices or techniques if they are not recognised by the certification system.
- Overemphasis on credentials: Employers may overemphasise the importance of certification over other factors such as experience, skills and talent.
- Lack of harmonisation: Certification systems may vary in their rigour, requirements and level of recognition, which can lead to confusion among

employers and other stakeholders (market, administration or general public) about the meaning and value of different certifications.

2.6. *Professional certification in the global framework of conformity assessment*

The global conformity assessment framework refers to the set of international standards and guidelines that govern the process by which products, services and systems are verified as meeting certain requirements or standards. This framework facilitates trade and market access by building confidence between producers and consumers (ISO/CASCO, n.d.), and it includes a number of key elements, including:

- International standards for conformity assessment (standards on management systems, testing and calibration, product certification, etc.)
- Accreditation processes, through which an independent organisation (accreditation body) assesses the competence and impartiality of organisations carrying out conformity assessment activities.
- Certification processes, where an independent organisation (certification body) assesses and verifies that a product, service or system meets certain requirements or standards.
- Testing and inspection to verify that products, services and systems meet certain requirements or standards through physical inspection and laboratory testing.
- Mutual recognition agreements established between countries or regions to recognise the results of each other's conformity assessment activities.

An example of the usefulness of conformity assessment could be when a customer is considering the purchase of a product (or a service) and needs to know whether the product offered by a given supplier will meet his or her expectations, characteristics and requirements, and whether or not it complies with the specifications. advertised

For consumers, conformity assessment is a benefit that provides them with reliable information when selecting the products or services they wish to purchase. For manufacturers and suppliers, it allows them to ensure that their products and services comply with the requirements and specifications demanded by the market. Typically, where the marketing of a product or service may present a risk to public health, the environment or safety, legislation makes certain conformity assessment procedures mandatory.

Therefore, when analysing the characteristics and performance of a professional certification system, it must be understood that these types of systems are not a totally original and unique; the structure and organisation of each one must be consistent with the global framework of conformity assessment.

ISO/IEC 17000:2020 states that conformity assessment includes testing, inspection, validation, verification, certification and accreditation activities (ISO, 2020). It defines certification as a third-party statement related to products, processes, systems or people, indicating compliance with specific requirements. It

also specifies the principles and requirements for the competence, consistency and impartiality of certification bodies and the certification process.

While certification is a commercial activity carried out by companies in markets where there is free competition, and it is aimed at all types of companies. Accreditation is a general interest activity aimed exclusively at conformity assessment bodies (Laboratories, Inspection Bodies, Certification Bodies and Verifiers), which in the case of the European Union must be exercised by a single accreditation body in each member state under the supervision of the public authorities (EC, 2008).

It should be noted that professional certification systems assess the performance and competence of people, not products and services, and there are specific standards for the assessment of the latter. ISO/IEC 17024 (ISO, 2012) governs the certification of people, and sets out the general requirements for bodies certifying persons in any field, including skills, knowledge and competence. The standard focuses on impartiality, staff competence, confidentiality and transparency in the certification process (Sebastián-Jiménez & González-Gaya, 2015). This standard also establishes that it is mandatory for the system to have the corresponding monitoring procedures in place for the maintenance, renewal (usually referred to as recertification) and/or withdrawal of certification.

Therefore, if an institution wishes to establish a professional certification system which guarantees quality, rigour, robustness and credibility, it should set up a certification body capable of meeting the requirements of ISO/IEC 17024 and pass an accreditation process for compliance with this standard.

3. Professional certification systems in project management

3.1. *Relevance of professional certification systems in the field of project management*

The first Professional Certification Systems in Project Management appeared in the 1980s, and since then they have developed extensively   in terms of the number of certifying bodies, types of certifications and certified people. Before addressing the existing systems and their specific features, the reasons why professional certification systems have been particularly successful in the field of project management should be analysed.

Firstly, it is important to note that it is a relatively young profession. Several authors (Stretton, 1993; Kwak, 2005; Seymour & Hussein, 2014) date the birth of project management as a new and distinct profession to the 1950s. This makes it an immature profession that is constantly evolving, in which new techniques and ways of doing things appear and even become new frames of reference, new approaches (iterative versus sequential, adaptive versus procedural, etc.) in which there is a clear need for the harmonisation of jargon structuring of methods and techniques and the definition of generally accepted good practices. To use the words of Abbasi & Jaafari (2018) "project management as a field of endeavor has

experienced step changes rather than incremental development, and it is too early to assume that it has entered its maturity phase".

This development has taken place in parallel with the formalisation of project management training programmes, which have evolved from short courses focused on specific techniques and IT tools to postgraduate programmes that compete with MBA programmes.

On the other hand, the market, looking for transdisciplinary professionals and without a clear academic definition as in other professions (medicine, law, engineering, architecture, etc.) resorted to certification as an alternative to the lack of specific academic qualifications, which has been alleviated in recent years with the proliferation of postgraduate degrees in project management, as mentioned above.

Finally, the fact that the discipline is so young has also led to project management being isolated from the traditional professional frameworks (reservation of activity domain, professional associations and councils, regulations requiring specific qualifications, etc.). there has been a lack of intervention by the administration in the regulation of the profession as a result of the processes of economic liberalisation and the deregulation of professions linked to engineering and economics (EU, 2006), and, in practice, this has led to companies being completely free to hire professionals linked to project management. Therefore, companies frequently resort to professional certification as a way of establishing prerequisites for certain jobs, while also segmenting or creating a hierarchy of the levels of responsibility of the professionals they hire. These processes are carried out using independent bodies specialised in the field that are often internationally recognized.

3.2. *Origin of professional certification systems in project management*

As previously mentioned, we can place the origin of the modern discipline of project management to around 1950. In the in the 1960s and 1970s techniques oriented to scope completeness, cost and quality control appear which led to the development of diagrammatic techniques based on activity networks and their application to the optimisation of project cost and schedule (Kwak, 2005),

In parallel to the development of these incipient techniques, the feeling of belonging to a profession increased and during the 1970s and 1980s the number of professional associations grew (Seymour & Hussein, 2014), as did their membership. In the 1980's, s these associations became consolidated they began to produce guides and training manuals, and as early as in the 1990s associations developed more conceptual approaches which were usually known as "bodies of knowledge" (Crawford, 2004; Morris et al..., 2006) or "standards" (Crawford, 2013; Grau, 2013), as can be seen in Table 2.

Among the characteristics necessary to establish a general professional certification system, it has been indicated that a basic requirement is the existence of robust

and well-defined standards that reflect the knowledge, skills and competencies required for the successful practice of the profession. These standards are the basic elements for building an assessment system, and their evolution should allow for the incorporation of the best practices available and promote professional updating.

It is therefore logical to assume that the main professional certification systems in project management are those developed by the professional associations presented in Table 2.

Table 2: Creation of Professional Associations and Development of Guidelines and Standards. Sources: APM (2019); Axelos (2017); CoEPM² (2018); IPMA (2015); Motzel & Pannenbäcker, O. (1998); OGC (2009); PMI (2017, 2021); Capuz-Rizo & Ordieres-Meré (2022)

Establishment of Professional Associations and initiation of certification programmes	Development of Guidelines and Standards (Project Management)
• 1960... Recognition of Project Management as a professional activity • 1965 IPMA Constitutive Meeting in Vienna (5 countries) • 1967 IPMA Legal Registry (Zurich) • 1969 PMI founded in Pennsylvania by 5 people. First seminar in Atlanta • 1972 APM UK • 1976 The Project Managers' Forum (Australia) 1989 The Australian Institute of Project Management (AIPM) • 1984 PMI launches PMP certification	• 1987 Project Management Body of Knowledge (PM-BoK) First Ed. PMI • 1989 Prompt II PRINCE (Projects in controlled environments) (OGC, UK) • 1992 APM Body of Knowledge • 1996 Project Management Body of Knowledge (PM-BoK) Second Ed. PMI • 1996 Assessment Structure VZPM PM certification in Switzerland • 1996 PRINCE2 (OGC, UK) • 1998 PM-KANON GPM/PM-ZERT PM certification in Germany
• 1992 AEIPRO (Spanish Association of Project Engineering) • 1995/96 APM (UK) and other IPMA member MAs launch certification programmes • 1998 Japan Project Management Forum 2005 Project Management Association of Japan • 1999 EXIN initiates PRINCE2 Certification • 2000 OCDP/AEIPRO PM Certification in Spain • 2007 ISO creates Programme Committee PC/236 • 2011 ISO establishes Technical Committee TC/258. • 2019 The PM2 Alliance is created to promote the use of PM2.	• 1999 IPMA Competence Baseline v.1 • 2001 IPMA Competence Baseline v.2 • 2004 PM-BoK 3rd Ed. PMI, • 2006 IPMA Competence Baseline v.3 • 2008 PM-BoK 4th Ed. PMI • 2009 PRINCE2: Refresh • 2012 ISO 21.500 • 2013 PM-BoK 5th Ed. PMI • 2015 IPMA Competence Baseline v.4 • 2017 PM-BoK 6th Ed. PMI • 2018 PM2 Open Project Management Methodology (oPM2, EU) • 2020 ISO 21.502 • 2021 PM-BoK 7th PMI Ed.

3.3. *Main professional certification systems in project management*

It is impossible to compile and list all the professional certifications related to project management that are offered by different institutions and companies in different countries, and if such a compilation were attempted, it would quickly become outdated.

However, it is feasible to identify professional certifications that are based on mature standards and that have undergone evolution and updates over the last three decades, managed by stable and robust institutions, which have certified hundreds of thousands of professionals and are recognized and used recognition in most developed countries . The most well-known certifications that comply with these requirements are AXELOS, PMI and IPMA. The following table shows the main certifications offered by these three project management organisations.

Some readers may think that some types of certifications have been left off the list, but the table does not include certifications for profiles other than project management, so there are no certifications in the areas of information technology management or business management offered by both Axelos and PMI, or those offered by IPMA for consultants and trainers (IPMA, 2018a); not to mention the types, levels and variants of certifications related to agile methods that growing exponentially.

Table 3: Main professional certifications in project management offered by AXELOS, Project Management Institute (PMI) and International Project Management Association (IPMA)

Organisation	Type of Certification in DP (Reference to the applied standard)
AXELOS (UK)	• PRINCE2® Project Management Certifications (Axelos, 2017) • PRINCE2 Agile® Certifications (Axelos, 2015) • MSP®: Managing Successful Programmes (Axelos, 2020) • M_o_R®: The Management of Risk (OGC, 2010) • MoP®: principles, practices, and procedures for successful portfolio management (OGC, 2011). • Portfolio, Programme and Project Offices (P3O®) (Axelos, 2013) Every type of certification includesan introductory level (Foundation) and an advanced level (Practitioner).
Project Management Institute (PMI, USA)	• Scheduling Professional (PMI-SP)® (PMI, 2019a) • Risk Management Professional (PMI-RMP)® (PMI, 2019b) • Agile Certified Practitioner (PMI-ACP)® (PMI, 2018a) • Certified Associate in Project Management (CAPM)® (PMI, 2017a and 2021) • Project Management Professional (PMP)® (PMI, 2017a and 2021) • Program Management Professional (PgMP)® (PMI, 2017b) • Portfolio Management Professional (PfMP)® (PMI, 2017c)

Organisation	Type of Certification in DP (Reference to the applied standard)
International Project Management Association	• Project Domain. Level A: Certified Project Director, Level B: Certified Senior Project Manager, Level C: Certified Project Manager, and Level D: Certified Project Management Associate (IPMA, 2015a). • Programme Domain. Level A: Certified Programme Director and Level B: Certified Senior Programme Manager (IPMA, 2015b). • Portfolio Domain. Level A: Certified Portfolio Director and Level B: Certified Senior Portfolio Manager (IPMA, 2015c). • Certified in Agile Leadership (IPMA, 2018b)

For readers interested in a very brief overview of the standards on which most of the above certifications are based, Van Haren periodically publishes the book "Global standards and Publications". It synthetically presents the frameworks and standards that serve as a basis for certification procedures. The 2020 edition of this guide (Agutter et al., 2020) presents 4 types of standards: IT Management, Enterprise Architecture, Business Management and Project Management; and the final category includes Agile (generic), ICB 4 from IPMA, ISO 21500:2012 and ISO 31000:2018 for risk management, MoP™, MoR®, MoV, MSP®, PRINCE2® and P3M3® and P3O® from Axelos, and PMBOK® Guide (PMI).

It is not the purpose of this chapter to make a more exhaustive analysis of other existing systems. However, it should be mentioned that in addition to these three major organisations, there are national project management associations with consolidated project management certification systems based on their own standards, such as the APM (Association for Project Management) in the United Kingdom (APM, 2019), the AIPM (Australian Institute of Project Management) in Australia and the PMAJ (Project Management Association of Japan) in Japan, and even the oPM2 created by DIGIT from the European Commission (2018). These systems should not be confused with other certifications created by local associations, training companies, small groups of professionals in a very specific sector, and even unethical individuals who create websites offering certifications with names that are suspiciously similar to those of the most prestigious systems. These websites often offer certifications that do not expire, they do not meet the certification requirements set out in ISO 17.024 and they could never pass an accreditation process. They simply create confusion in the market and slow down the development of truly valuable professional certification systems.

In the bibliography, there are articles that have been published in scientific journals and congresses that analyse the existing professional certifications in project management, comparing the access requirements and the demands or levels of effort needed to achieve them. Remer (Remer et al., 2007) provides information on the organisation offering each credential, eligibility criteria and certification

requirements, as well as the type of exam, and the cost, for PMI's PMP and
CAPM, PMI Certified OPM3 Assessor and Consultant, Certified Construction
Manager (CCM), Engineering Management Certification Fundamentals (EMCF)
and Professional (EMCP) certifications. In Remer & Ross (2014), the rest of the
PMI partial certifications (Programme, Portfolio, Agile, Risk, Sequencing), to
the 4 IPMA levels and two certifications of the American Society for Engineering
Management (ASEM) are added to the information found in the previous study.

Cardoza (2011) compares four professional project management certification
systems (PMI, IPMA, PRINCE2 and P2M of the Project Management Association
of Japan), analysing the levels of certification, the standards and methodological
guides on which they are based, the approach to processes, components, areas and
competencies they define and the procedures necessary to achieve the different
levels of certification offered. Since 2010, Giammalvo (2023) has periodically
updated a report comparing more than 30 credentials that are, to a greater or
lesser extent, related to project management with exhaustive, and in some cases
highly critical, opinions. He/she states that the promises advertised by some of
the certification bodies often exceed the knowledge and experience required in the
evaluation process passed by the candidates.

Finally, since the constitution by ISO of the Programme Committee PC 236
and the subsequent creation in 2011 of the Technical Committee TC 258, ISO has
launched and revised numerous standards related to the management of projects,
programmes and portfolios, but to date none of the standards has been devel-
oped with the structure and definition of requirements of a certifiable standard
(Capuz-Rizo & Ordieres-Meré, 2022).

3.4. *Specific benefits of project management certification*

Here are some of the specific benefits of professional certification in project
management:

- Improving skills and knowledge: Professional project management certi-
  fication programmes provide a structured and comprehensive approach
  to developing skills and knowledge in project management. This can help
  individuals keep up to date with the latest, proven frameworks, methodol-
  ogies and best practices.
- Demonstrate competence and credibility. Professional certification in
  project management should demonstrate an individual's knowledge, skills
  and experience in project management in order to build credibility with
  employers, clients and colleagues.
- Enhance career opportunities. Project management is a fast-growing field
  and obtaining a professional certification can demonstrate your commit-
  ment to continuous learning and professional development, which is valued

by many employers who may require it for certain roles or promotions, becoming a competitive advantage in job applications and salary negotiations.

- Improve project success and reduce risk by encouraging project managers to gain the knowledge and skills to plan, execute and close projects effectively, as well as being able to identify and mitigate risks, which can to more successful outcomes.

- Improve organisational performance: companies can benefit from professional certification in project management by ensuring that their project managers are effective and efficient professionals, as well as helping to standardise project management practices and processes across an organisation.

- Promote the advancement of the profession: professional certification in project management contributes to this objective by establishing well-defined and structured standards that promote the acquisition of knowledge, and the development of skills and experience, in a way that evolves and refines the practice of the discipline and enhances the reputation and prestige of the profession.

- Encourage networking and community building: Associations and institutions that support or promote professional certification programmes often facilitate access to networking opportunities and a community of peers who share similar interests and goals. This can provide valuable support, advice and mentoring for individuals seeking to advance their careers in project management.

3.5. *Opportunities for improving professional certification systems in project management*

While professional certification systems in project management have many benefits, there are, of course, also some weaknesses and areas for improvement. The following are some potential areas that could be addressed to improve these systems:

- Greater focus on practical application: Many project management professional certification programmes place a strong emphasis on theoretical knowledge, but may not assess practical application rigorously enough. People with no real-world experience may pass an exam more easily than people who come from work experience, while not being required to demonstrate that what they have learned has been applied to real-world situations. Incorporating more hands-on learning opportunities, such as case studies and simulations, could help individuals better understand how to apply project management concepts and techniques in practice.

- Flexibility and customisation: Professional certification programmes in project management often have rigid requirements and may not allow for customisation to an individual's specific needs or experience.

- Updating content and keeping pace with industry changes: The field of project management is constantly evolving, and professional certification programmes must keep pace with these changes to remain relevant and effective. Regular updates to certification content, as well as continuing professional development opportunities, could help ensure that individuals keep up with the latest industry trends and best practices.

4. Contribution of professional certification to success in project management

4.1. *Measuring the impact of professional certification schemes.*

One of the main issues regarding professional certification in general, and specifically in the field of project management, is whether it really provides value, and , to what extent the time and money spent by individuals or by the companies that hire and support them to achieve a professional certification is worthwhile.

Demonstrating the impact of professional certification on individual and organisational maturity can be challenging as it involves measuring intangible factors such as knowledge, skills and competencies. However, there are several ways to assess the impact of professional certification:

- Performance evaluations: Organisations can evaluate the performance of project managers who have obtained professional certification and compare this with those who have not. This can help identify differences in project success rates, stakeholder satisfaction and overall performance.
- Surveys and feedback: Surveys can be conducted to gather feedback from project managers, team members and other stakeholders on the impact of professional certification on project management maturity. This can provide valuable information on the perceived value of certification.
- Case studies and best practices: organisations can document and share case studies on and the best practices of project managers who have obtained a professional certification.
- Research and benchmarking: Industry research and benchmarking studies can be conducted to compare the performance of organisations that invest in professional certification with those that do not.

4.2. *Review of scientific literature*

A literature review of research papers published over the last twenty years in scientific journals analysing the relationship between project management success and professional certification has been carried out in an attempt to estimate the value generated by certification and to answer the question: to what extent can project management by professionally certified project managers improve project success?

Most of these papers conclude that it is not possible to demonstrate a direct correlation between the level or percentage of success in managed projects and the possession of a project manager certificate. At first, this result seems paradoxical and contrary to common sense, as the training and effort required to obtain professional certification should provide positive results, but the issue requires further analysis.

The first question that arises, widely in scientific literature, is how to assess success in project management, how to measure it, who can judge it, and whether assessment should only be quantitative, or also qualitative (Ika & Pinto, 2022). In addition, it is possible to attempt to quantify the value offered by the application of the methodologies and techniques of the project management discipline. Some studies have identified numerous difficulties in doing so. (Thomas & Mullaly, 2007).

Mahaney & Greer (2004) studied the benefits of Project Management Professional (PMP®) certification for companies undertaking information system projects, concluding that while improvements could be found in customer satisfaction, communication and collaboration, and even greater job satisfaction and motivation among certified project managers, the benefits of PMP certification for organisations are not easily quantifiable.

Müller and Turner (2007) analysed the influence of project managers on project success criteria and project success by project type by surveying 959 project managers. They found that the importance attached to project success criteria and project success rates differed according to industry, project complexity and the age and nationality of the project manager. They could not show that there was a substantial difference between the results achieved by certified and non-certified project managers. However, in high-demand projects, certified project managers scored significantly higher in terms of project success than non-certified project managers, leading them to conclude that professional certification in project management is more useful for improving the performance of high performers, but not necessarily for that of lowperformers.

Starkweather & Stevenson, (2011) studied the PMP® and its valuation by information technology (IT) executives as a basic requirement for project management and as a factor related to project success. The analysis found no statistically significant difference in project success rates between PMP-certified and non-certified project managers, suggesting that this certification does not impact or guarantee soft skills such as communication and leadership, which are critical to project success.

Catanio et al. (2013), also with a study in the IT industry, collected data from practising project managers, with and without certification, and with differing years of experience, and found that there was no statistically significant difference in project cost and schedule management between certified and non-certified project managers with the same level of experience.

Similar to the previous two examples, another study (Joseph & Marnewick, 2018) on the impact of project management certification on IT project success did not find that certification has a significant impact on project performance, and it suggests that certifications should adopt new approaches to ensure a balance between the hard and soft skills needed for effective IT project management. It also questioned whether the generalist project management approach for any project type is applicable to IT projects, calling for specialisation tailored to the IT industry.

In more recent work, Aslam & Bilal (2021) have not yet been able to give a categorical answer. In their research, based on the theory of critical success factors, they examined the impact of project management certification on project performance, including professionalism and psychological capital as intervening variables, concluding that project management certification can have a positive impact on project performance, but it is very difficult to separate the benefits obtained from other correlated factors, such as the level of professionalism.

In short, most of the papers justify the above-mentioned paradox with fundamental criticisms of professional certification in project management concerning the general applicability of certifications that are valid for any type of project ("one size fits all" or that a professional who is suitable in one context can be said to maintain his or her level of performance when changing his or her field of activity, organisation or even geography and/or culture. The suitability of certifications based on procedures that are difficult to fit into some sectors, such as procedural models in the field of IT, is also discussed, as evidenced by the increasing popularity of agile project management methodologies, and the emergence of hybrid methodological approaches that are more flexible than traditional models.

Another important aspect to consider is how the motivation for gaining professional certification in project management has evolved over time. According to a study comparing motivation to become certified and the perceived benefits after certification, using data from 2004 and 2014 (Blomquist et al., 2018), candidates seeking project management certification in 2004 demonstrated higher levels of motivation than candidates in 2014, but they received fewer benefits than those who became certified in 2014.

In 2004, practitioners seeking certification were mainly motivated by internal factors, associated with increased knowledge and improved professional performance, and after the certification process, they noted that the main rewards obtained were intrinsic, such as increased personal satisfaction or self-fulfillment, but they felt that they had not received the recognition they deserved from their peers or their clients. However, in 2014, self-fulfillment and desire for professional growth was still the main motivation for certification, but project managers perceived that greater external appreciation of certification existed.

In the literature review it is also possible to find other types of results linked to the effect of certification on the development of the profession. Vlahov et al.

(2016) studies the professionals certified in project management in accordance with the IPMA model (ICB 3.0) in four countries in the cultural and geographical area of the Mediterranean (Italy, Spain, Portugal and Croatia) during the period 2007-2014, correlating different variables such as levels of certifications obtained, sectors of activity of certified managers, rate of certified project managers per capita and the level of gross domestic product per capita, etc. Paneque et al. (2021) studies the assessments carried out with the IPMA model (ICB 3.0) in Spain during the period 2014 to 2019, for levels C, B and A, in which the submission of a STAR (Situation-Task-Activity-Result) report and an interview with two assessors is required. This determines to what extent the principle of sustainability is present in the projects submitted for assessment in the STAR reports, and to what extent the IPMA assessment procedure allows the relationship between elements of competence and sustainability to be captured and made explicit.

4.3. *Analysis of the literature review and personal interpretation*

The previous section does not provide a satisfactory answer to the question posed, and, in fact, it seems to generates more questions than answers. In an attempt to reduce uncertainty, I can only offer a personal and therefore subjective view. As the comparison between the value, demands, rigour and usefulness of the different certifications existing on the market is a subject that is constantly being discussed, in which everyone has their own vision, opinion and preferences, I consider it appropriate to explain my background. My perspective is the result of my experience as a project manager in logistics consultancy and competitive research, as a certified project manager (IPMA Level B), as an assessor of candidates for certification (IPMA levels B, C and D), as a professor of project management and as a student of the different frameworks, methodologies, models and standards in project management.

From my point of view, all project management professional certification systems can function as small stepping stones or as magnificent ladders leading to the improvement of professional performance, depending on who approaches them.

If a system is approached by someone who holds any of the following opinions: certification is the end of the road; once certification is achieved a "catch-all" licence that is valid for any project will have been acquired; they already have as much professional competence as any other certified manager, and certainly more than any other non-certified project manager; professional update is as unnecessary as certification renewal or certification is the goal and once achieved the ceiling has been reached, then it is unlikely that this individual will become an excellent project manager.

If, on the other hand, we find a professional with the following favorable qualities: basic experience; a growing skill set, good evaluation of tasks performed;

free from demands from his or her company or clients; motivated by professional growth; responsible for o becoming more efficient and offering better results to his or her colleagues, clients, company and society in general; acting in a responsible and honest way; and dedicating part of his or her free time to studying, preparing tests and exams; prepared to cover the costs of training and prepared to take the risk of not passing the certification process despite the time and money invested, we can probably assume that this individual would benefit from a professional certification system that could be the most important tool for the development of a successful professional career in project management.

Logically, this personal point of view means that certain characteristics of project management certification systems seem more useful to me than others. For example, I think that a certification aimed at people with basic experience is more useful than certifications that do not require this. I believe that a system in which a third party assesses professional experience is better than one that relies on self-assessment. I believe that behavioural and adaptive skills and competencies are as important as having knowledge of technical skills and of the use of methods and tools. I think that a multi-level certification system, which evolves in size and complexity in parallel with the projects managed, is better than a single-entry system ("pass or fail"), which does not rank certified project managers and does not encourage further career progression.

And I consider that receiving a personalised report from the assessors at the end of the certification process, usually called a gap plan is just as important for everyone as the professional certificate that the obtain. This feedback should show each candidate both the strengths and weaknesses identified, highlighting areas of improvement that other people will find difficult to detect and, if they do, will avoid commenting on. The gap plan should serve as a guide to help each newly certified professional start working on his/her next career step and even his/her next level of certification.

5. Contribution of professional certification in project management to the projectification of society

5.1. *Project management and the projectification of society*

If we understand the term "the projectification of society" to mean the increasing tendency to organise and manage social, economic and political activities as projects, i.e., the fact that more and more activities are planned, executed and monitored in a structured and systematic way using project management techniques and tools.

As mentioned in section 3.2, it was in the mid-20th century that project management began to emerge as a distinct discipline in the context of engineering and construction projects for large infrastructure and equipment. As these projects be-

came more complex and required the coordination of multiple stakeholders, more advanced project management techniques were developed to ensure that they were completed on time, within budget and within the contracted scope and quality requirements. Over time, the application of project management techniques has expanded beyond engineering and construction projects to include other types of projects, such as software development, marketing campaigns and organisational change initiatives. In recent years, the importance of projects in society has become more pervasive, and many aspects of social, economic and political life are organised and managed as projects (Schoper et al., 2018).

Several factors have contributed to the projectification of society, including globalisation, technological advances and the increasing complexity of social, economic and political systems. In response to these factors, project management has evolved and diversified, with the development of new methodologies and approaches to address the unique challenges of different types of projects.

5.2. *Professional certification in project management and the growth of project management maturity*

The profession and the discipline are now forty years old. Numerous standards, methodologies and IT tools have been developed, but success rates in project delivery are unsatisfactory (as surveys and studies show year after year) (PWC, 2012; PMI, 2018b; Wellingtone, 2021).

Why, when we know what activities, processes and techniques must be carried out to manage a project, are the success rates still low? Why do some project teams repeatedly suffer deviations in time and cost, or are unable to implement the project products (deliverables) while also meeting all the contracted requirements, while other teams systematically obtain better results? Is it possible to measure the efficiency with which organisations develop project management and governance?

In response to these questions, the concept of organisational maturity in project management arises as a variable that assesses the probability that a given organisation will successfully manage the execution of a project.

By undergoing certification, project managers must demonstrate a certain level of knowledge, skills and experience in project management. This can help project managers develop a deeper understanding of the discipline and improve their ability to manage projects effectively. In addition, a professional certification system can also contribute to the maturity of an organisation by helping to establish standardised project management practices and processes. Certification can help ensure that project managers follow best practices and adhere to industry standards, which can lead to better project outcomes and overall organisational performance.

5.3. *Professional certification in project management and the projectification of society*

It is possible to posit the existence of a correlation between professional certification systems and the projectification of society considering that both phenomena are driven by a growing recognition of the importance of effective project management.

Certification schemes provide a way to demonstrate and validate an individual's competence in project management, which becomes increasingly important as projects become more complex and require higher levels of expertise. By obtaining professional certification, individuals can showcase their knowledge and skills to potential employers and clients and differentiate themselves from others who may not have the same level of qualifications.

At the same time, the projectification of society is creating an increased demand for people with project management expertise, as more and more activities are organised and managed as projects. This demand is driving the development of certification programmes to ensure that there is an adequate supply of qualified professionals who can meet the needs of the growing project management industry (Wagner et al., 2021).

In this way, certification systems and the projectification of society are interconnected, with the former supporting the latter, and the latter providing as a stimulus to the former. In essence, the projectification of society provides a growing recognition of the importance of structured and systematic approaches to managing complex activities, which are often organised as projects, addressing the limitations of traditional approaches to activity management, which may be less effective in dealing with the complexity and uncertainty inherent in many modern projects.

Professional certification systems, in turn, reflect a similar recognition of the importance of structured and systematic approaches to developing and validating project management expertise, providing a standardised framework for assessing and certifying the skills and knowledge of project management professionals, and thereby helping to ensure that there is a growing level of competence in different contexts, which in turn supports the wider trend towards projectification in society.

From this perspective, professional certification systems and the projectification of society can be seen as two interconnected phenomena, linked by changes in the way we organise and manage social, economic and political activities.

5.4. *Future perspectives for professional certification in project management and the projectification of society*

One possible trend is that the projectification of society will continue to accelerate in the coming years, as businesses and organisations increasingly recognise the benefits of structured and systematic approaches to managing complex activities.

This trend may be further fuelled by technological advances, which are enabling new types of projects to be undertaken that were not previously possible.

As the projectification of society continues to evolve, it is likely that existing professional certification systems in project management will also need to adapt and evolve to keep up with changing demands and expectations. This may involve the development of new certification programmes that are tailored to specific industries or project types, as well as the integration of new technologies and methodologies into existing certification programmes.

Another potential trend is that the role of project managers may change in response to changing demands and technological developments. For example, the increasing use of artificial intelligence and machine learning may lead to a greater emphasis on data analytics and predictive modelling, requiring project managers to develop new skills and competencies in these areas. Similarly, the growing importance of sustainability and social responsibility may require project managers to incorporate new ethical frameworks and decision-making models into their work.

In response to these changes, professional certification systems may need to evolve to include new skills and knowledge areas, as well as new assessment methodologies that can accurately measure these skills and competencies. This may involve the use of new technologies, such as virtual reality simulations or other advanced assessment methods.

In summary, the future evolution of professional certification systems in project management is likely to be determined by a complex interplay of technological developments, social and cultural trends and changing demands and expectations of companies and organisations. While it is impossible to predict the future, it seems clear that the projectification of society will be a key driver of change in the field of project management, and that professional certification systems will need to adapt and evolve to maintain their usefulness and relevance in the future.

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Proyectificación de la sociedad
Un debate necesario

Germán Martínez Montes y
Begoña Moreno Escobar (eds.)

PROYECTIFICACIÓN DE LA SOCIEDAD
UN DEBATE NECESARIO

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UN DEBATE NECESARIO

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Germán Martínez Montes

Titular de la Cátedra Jean Monnet PM²EU+
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Coordinadora Académica de la Cátedra Jean Monnet PM²EU+
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La Cátedra Jean Monnet "*PM² by European Commission. Open, free and common project management framework for all European institutions, companies and citizens. – PM²EU+*" ha estado trabajando en los últimos tres años, tratando de dar visibilidad a la metodología PM² de la Comisión Europea y haciéndola llegar al mayor número posible de usuarios potenciales (estudiantes, jóvenes investigadores, funcionarios y profesionales). La Cátedra ha ejercido durante este tiempo como catalizador y punto de intercambio de conocimientos y experiencias relacionadas con la gestión de proyectos.

A partir de todas estas experiencias, sin lugar a duda enriquecedoras, se ha sido consciente de la creciente importancia y protagonismo que la gestión de proyectos tiene en la sociedad. Efectivamente, el fenómeno conocido como "proyectificación" se ha expandido en los últimos años, afectando a distintos niveles y con diferentes consecuencias. De hecho, existen evidencias que vinculan el grado de proyectificación de los distintos sectores productivos con el crecimiento económico.

La proyectificación supone un mayor número de actividades gestionadas como proyectos, pero también implica transformaciones organizativas desde una visión funcional a una visión proyectual. Igualmente implica transformación en los modelos de comportamiento de los trabajadores e incluso determina como las administraciones públicas e instituciones dan forma a sus políticas a corto y medio plazo.

La comunidad internacional ha asumido el fenómeno de proyectificación analizando en los últimos años las ventajas e inconvenientes de un modelo de gestión que aporta grandes beneficios a la sociedad en general, pues busca la optimización de los recursos económicos y de las acciones derivadas de la toma de decisiones mediante un control continuo, con el establecimiento de plazos, hitos y criterios de medición de éxito o de fracaso de estas decisiones. Por otro lado, la proyectificación trae consigo efectos no deseados, lo que algunos autores han acordado en llamar

el lado oscuro de la proyectificación, que merecen ser estudiados y conocidos con objeto de poder atención para reducirlos y evitarlos en la medida de lo posible.

La Cátedra Jean Monnet PM²EU+ es consciente del interés que el fenómeno de la proyectificación está despertando, en la comunidad académica, en los profesionales, en las administraciones y en el público en general; es una forma de organización que se está extendiendo a todos los niveles posibles: micro (individual), meso (organizaciones), macro (sectores) mega (países y organizaciones supranacionales) y finalmente meta (nivel global).

Por este motivo, se ha diseñado la presente publicación de título *Proyectificación de la sociedad: un debate necesario*, entendiendo que está totalmente alineada con el sentido de las acciones Jean Monnet de la Comisión Europea, que no es otro que el abordar con rigor aquellos aspectos que afectan, condicionan y configuran las relaciones de los europeos entre ellos y con terceros.

La decisión de promover una publicación de estas características suponía un ejercicio de responsabilidad dado el impacto de la Cátedra Jean Monnet que se ha podido comprobar y sentir a lo largo de la vigencia del proyecto. No obstante, precisamente por el impacto y el prestigio que otorga la Cátedra Jean Monnet ha sido posible contar con un elenco de colaboradores de reconocido prestigio a nivel internacional en diversos aspectos relacionados con la gestión de proyectos. En este sentido, y siendo conscientes que la gestión de proyectos exige una aproximación diversa que permita abordar todos los aspectos que implica, se ha cuidado el trabajar con colaboradores profesionales de la gestión de proyectos procedentes tanto del mundo académico, como del mundo empresarial e incluso de instituciones y organizaciones profesionales. Dentro de alguno de estos sectores se han recogido distintas sensibilidades que han permitido conocer las verdaderas dimensiones y consecuencias de la proyectificación de la sociedad como un hecho contrastado a fecha de hoy.

Esto ha dado lugar a esta publicación que incluye un total de once capítulos que abordan el fenómeno de la proyectificación desde muy diversas ópticas y aportando visiones personales que ayudan a construir las bases de un debate necesario que ayude a mejorar las consecuencias de este fenómeno que, sin lugar a duda, presenta claroscuros que no pueden ser obviados si se quiere seguir mejorando los modelos de gestión.

El orden en que se presentan los capítulos no responde en absoluto a una jerarquía o supuesta importancia relativa. Uno de los aprendizajes a lo largo del proceso desarrollado para poder presentar esta publicación es que la gestión de proyectos y su consecuencia en forma de proyectificación de la sociedad exige una aproximación multidisciplinar. Es evidente la confluencia de componentes económicos, empresariales, políticos, sociales y, por supuesto, individuales. Esto hace que estemos ante una cuestión realmente compleja, pero a la vez apasionante, y así hemos entendido esta publicación.

Sobre el contenido específico de la publicación, el libro comienza con el capítulo 1, Proyectificación y Economía (Yvonne Schoper †-University of Ber-

lin)[1]. La autora aborda la relación directa del fenómeno de la proyectificación y el desarrollo económico, siendo esencial ahondar en el conocimiento de estas relaciones para poder presentar posibles mejoras a todos los niveles, pues los proyectos son una fuerza motriz para el desarrollo empresarial y económico.

El capítulo 2, Proyectificación y PYME (Juan Manuel Domíngue-APGP) analiza las consecuencias y características singulares que presenta el fenómeno de la proyectificación en las Pequeñas y Medianas Empresas. Su importancia radica ya no solo en las situaciones que se describen sino en el peso específico que tienen este tipo de empresa en la mayoría de las economías mundiales, por ello es fundamental que aprovechen los proyectos como herramienta para competir en el contexto actual y aprendan a ejecutarlos con éxito.

El capítulo 3, Proyectificación y desarrollo (Agustín Moya & José Luis Yague - Universidad Politécnica de Madrid) aborda el fenómeno en relación con los proyectos de cooperación al desarrollo. Éstos presentan como principal singularidad la vocación de utilidad durante todo su ciclo de vida, en donde el camino recorrido es tan importante o más como los entregables en sí. Al ser proyectos orientados a la capacitación de comunidades y con una gestión particular, el fenómeno de la proyectificación les afecta definitivamente y se han de cuidar que las propuestas de gestión no condicionen los resultados esperados. Para ello es imprescindible fortalecer las capacidades y profesionalizar el papel del director de proyectos de cooperación para el desarrollo.

En el capítulo 4, Proyectificación y academia (Javier Pajares - Universidad de Valladolid) se concluye que la proyectificación de la academia permite mejorar la competitividad de las universidades, para responder mejor a las demandas cada vez más exigentes de la sociedad. Igualmente, permite que los académicos puedan organizar mejor el conjunto heterogéneo de actividades que integran la labor docente, así como ayudar a elaborar mejores propuestas en las convocatorias públicas y gestionar mejor los proyectos de investigación. Ya en el ámbito de la gestión universitaria la implantación de estructuras organizativas como la Oficina de Dirección Proyectos (PMO, Project Management Office) permite desarrollar la estrategia universitaria, fijando prioridades y optimizando su gestión al compartir recursos. Es necesario promover de manera generalizada acciones de concienciación y formación para mejorar las competencias en dirección de proyectos tanto de académicos como de gestores.

El capítulo 5, Proyectificación y Unión Europea (Mats Fred –Universidad de Lund; Beata Jałocha-Universidad Jagiellonian; Dalia Mukhtar-Landgren-Universidad de Lund) analiza el fenómeno de la proyectificación en el ámbito de la Unión Europea y las singularidades y características que lo denominan "proyecto-UE". Para ello hacen una aproximación analítica a tres niveles: micro, meso y macro,

1. Desgraciadamente, la profesora Yvonne Schoper falleció a finales del pasado mes de Abril, durante la conferencia de investigación de IPMA, en China. Sirva esta publicación como homenaje póstumo y reconocimiento a su trabajo e investigación sobre la gestión de proyectos.

llegando a conclusiones realmente interesantes sobre la transformación de la UE a partir de la gestión basada en proyectos.

En el capítulo 6, Determinantes de los aspectos negativos de la proyectificación (Claudette El Hajj-NTU Lebanon; Dima Jawad-Ontario Tech University) se hace un esfuerzo importante para identificar los factores determinantes de las consecuencias o efectos no deseados del fenómeno de la proyectificación en tres niveles (micro, meso y macro). Requiere especial atención el impacto sobre los individuos tanto a nivel laboral como a nivel personal, concluyéndose en la necesidad ineludible de tener presente estos efectos a la hora de diseñar modelos de gestión que se están generalizando en los últimos años.

A lo largo del capítulo 7, Proyectificación de la sociedad –una perspectiva sociológica (Reinhard Wagner-Alma Mater Europaea ECM, Maribor, Eslovenia) se ilustra como los proyectos ofrecen una oportunidad ideal para la autorrealización a través de una intensa colaboración con otras personas. Esto es más probable que ocurra sobre una base cultural-cognitiva apropiada y sobre los modelos de proyectos exitosos y es menos probable que se logre a través de reglamentos, normas o estándares. Igualmente ahonda en cómo puede fomentarse la proyectificación para dominar mejor los múltiples retos sociales del futuro.

En el capítulo 8, Cuestiones clave en la gestión de la organización basada en proyectos (Rodney Turner-Escuela de Ingeniería Civil, Universidad de Leeds) el profesor Turner presenta de forma casi autobiográfica el camino andado a lo largo de muchos años y en los que, centrado en la gestión de proyectos, ha estudiado a fondo temas como la gobernanza, el éxito de los proyectos, el marketing y las escuelas de gestión de proyectos entre otros.

En el capítulo 9, El lado oscuro de la proyectificación (Yannick Kalff-Universität Osnabrück) el autor aborda el fenómeno de la proyectificación desde la perspectiva del individuo y como ésta acentúa autorresponsabilidad y la autoorganización de los ciudadanos creando de esta manera seres proyectificados. Esto tiene consecuencias de importancia que hay que vigilar con objeto de evitar consecuencias negativas totalmente indeseadas.

El capítulo 10, Proyectificación y asociaciones de gestión de proyectos (Martínez Almela-International Project Management Association) ayuda a crear una visión que permita a las asociaciones de dirección de proyectos obtener una mejor comprensión del proceso de proyectificación y, en consecuencia, una mejor orientación acerca de la importancia de su función en el fenómeno de proyectificación social junto con su estado actual y evolución futura.

Finalmente, el capítulo 11, Proyectificación y certificaciones (Salvador Capuz-Universitat Politècnica de València) analiza el papel y el orden de utilidad de las certificaciones profesionales personales en la cualificación de los trabajadores para afrontar un entorno cada vez más proyectificado.

De la lectura de los capítulos, el lector podrá apreciar múltiples estilos literarios que han sido respetados con apenas correcciones formales. Con ello se ha conseguido una publicación heterogénea en cuanto estilos, enfoques, contenidos y experiencias, lo que se traduce en un documento de gran valor ya que dibuja la totalidad del mapa de la gestión de proyectos, con sus riquezas y complejidades.

De esta manera, cuando un corpus de conocimiento se encuentra en proceso de consolidación y expansión continua, el significado de cada uno de los términos utilizados se va definiendo y conformando a partir de los diferentes estudios, investigaciones y referencias que se van realizando.

En este sentido, el debate entre los autores del libro sobre el significado y alcance de algunas palabras, especialmente "proyectificación" y "proyectización", ha sido enriquecedor. Como punto de partida se utilizó la siguiente referencia:

> Según Müller (2009), el (nivel de) proyectización indica hasta qué punto una empresa se basa en proyectos y predomina la forma de trabajar basada en proyectos. Así pues, habría que distinguir entre proyectización y proyectificación, aunque esto no esté (todavía) comúnmente aceptado. Por proyectización se entiende el grado de organización de las actividades mediante proyectos, lo que constituye una condición previa para la proyectificación; la proyectificación tiene un significado mucho más amplio, que abarca la proyectización.

Javier Pajares (Universidad de Valladolid-España) aportaba que proyectización y proyectificación no significan lo mismo, pero la frontera entre ambas es muy difusa y a veces "peligrosa". Es similar a las palabras crédito y préstamo en el sector financiero. La frontera es tan estrecha que alguien puede usar proyectificación cuando quería sugerir proyectización; y aun así, también es posible que alguien use proyectización cuando proyectificación es el significado deseado. Por esta razón, podría ser inspirador saber que una búsqueda en Google de proyectificación da 31.500 resultados, mientras que proyectización sólo da 13.500. Por lo tanto, sugiero utilizar proyectificación, salvo en casos particulares. Pero estos argumentos pierden fuerza cuando en español las cifras de Google son las contrarias: 939 para proyectización y 124 para proyectificación (17 de feb. 1:18 CET).

Por otra parte, Reinhard Wagner (Alma Mater Europaea ECM) quiso poner en valor las posibilidades de la inteligencia artificial, formulando la consulta a ChatGPT:

> Los términos "proyectización" y "proyectificación" están relacionados con el proceso de organizar el trabajo en proyectos, pero tienen significados ligeramente diferentes.
>
> "Proyectización" se refiere al proceso de organizar el trabajo que normalmente se realiza en un contexto funcional o departamental en una estructura basada en proyectos. Esto implica la creación de una organización temporal, a menudo con un jefe de proyecto y un equipo, que se centra en completar un proyecto o

conjunto de proyectos específicos. La proyectización suele utilizarse para mejorar la eficiencia de los proyectos, reducir costes y aumentar la responsabilidad y visibilidad del trabajo de los proyectos.

La "proyectificación", por su parte, se refiere a una tendencia más amplia de la sociedad moderna, en la que cada vez más actividades se organizan como proyectos. Esta tendencia puede observarse en muchos ámbitos, como la empresa, la administración, la educación e incluso la vida personal. La proyectificación puede considerarse una respuesta a la creciente complejidad e incertidumbre del mundo moderno, en el que las estructuras organizativas tradicionales pueden resultar menos eficaces.

En resumen, la proyectización es el proceso específico de organizar el trabajo en una estructura basada en proyectos, mientras que la proyectificación es una tendencia más amplia hacia la organización de cada vez más actividades como proyectos.

Beata Jałocha (Universidad Jagellónica de Cracovia) recordaba que la mayoría de las publicaciones científicas utilizan el término proyectificación. Esto parece natural porque, como es bien sabido, este término, acuñado en primera instancia por Christophe Midler, ha inspirado una amplia investigación sobre los procesos impulsados por proyectos. El fenómeno adquirió su nombre, lo que permitió –en el entendimiento de Wittgenstein de que es posible conocer lo que se nombra– iniciar una investigación en profundidad sobre los procesos de proyectificación.

Según el autor Arvi Kuura, "la proyectificación y la proyectización deberían distinguirse más bien". Por tanto, el elemento clave que nos permite entender la diferencia entre proyectización y proyectificación es, en nuestra opinión, cómo definimos proyecto:

—En el caso de la proyectización, nos remitimos más bien a la conocida definición de proyecto, en la que se entiende por proyecto una actividad de gestión limitada por los recursos, el tiempo y el alcance.
—Cuando hablamos de proyectificación, la noción de proyecto se vuelve mucho más compleja y difusa. Al investigar la proyectificación, los científicos suelen referirse a otras formas de actividades, no necesariamente definidas como proyectos en un sentido más estricto: subvenciones, iniciativas de cofinanciación, colaboraciones o actividades personales también suelen denominarse proyectos (aunque en sentido estricto no son proyectos).

Además, la proyectificación no se refiere únicamente al número de proyectos, sino a la institucionalización de los proyectos en la sociedad, donde los proyectos y las actividades similares a los proyectos se integran en todos los niveles y ámbitos de la sociedad a través de creencias, normas, valores, estructuras y modos de comportamiento. Existe una línea difusa entre proyectización y proyectificación. Sin embargo,

estamos de acuerdo en que la primera puede medirse realmente, mientras que la segunda es un concepto paraguas, un constructo sociocultural multidimensional.

Recibidas todas estas aportaciones por parte de los colaboradores, se puede llegar a un consenso. El uso de "proyectización" se referirá al proceso de organización del trabajo que normalmente se lleva a cabo en un contexto funcional o departamental a través de proyectos. Por otro lado, se utilizará "proyectificación" cuando se produce un cambio en las estructuras organizativas hacia una gestión basada en proyectos, en cualquiera de los niveles estudiados, como respuesta a un entorno VUCA (volátil, incierto, complejo y ambiguo) con el fin de optimizar la gestión y los resultados esperados.

Todo lo indicado aquí se refiere a los términos en inglés. Cuando se trata del idioma español surge la duda en la utilización ya que, al margen de las citas de Google indicadas por el Prof. Pajares, Jesús Martínez (IPMA) sugiere que no proyectificamos la sociedad, sino que la proyectizamos, ya que lo que se proyecta es el proyecto mientras que una organización, un ente y por ende la sociedad se proyectiza. El problema se plantea al disponer de dos términos en inglés y uno único en español. La solución podría pasar por utilizar "incremento del número de actividades gestionadas como proyectos" cuando se viniese del término inglés "projectization" y mantener proyectización cuando viniese del término inglés "proyectification", aunque estaría creando lo que en términos del lenguaje y la traducción se conoce como un "false friend".Otros términos como "proyectariado", "seres proyectificados", etc., tienen un alcance y significado que queda perfectamente claro en el contexto en el que utilizan.

Como puede comprobarse, la publicación se presenta en un formato bilingüe, español e inglés. Esta decisión persigue el aumentar los potenciales lectores finales. El inglés es el lenguaje dominante en las publicaciones académicas, así como en el desarrollo de las principales actividades económicas a nivel mundial. Por otro lado, el español es el lenguaje de la Universidad de Granada, titular de la cátedra, pero es a su vez un lenguaje con un enorme protagonismo en Latinoamérica y en claro crecimiento como segunda lengua en países como Estados Unidos de América. Además, presentando la publicación bilingüe se dispone de un documento en el que se presenta en paralelo la terminología de gestión de proyectos, habiéndose cuidado en extremo la utilización de términos en los idiomas consensuados por las principales organizaciones mundiales de la gestión de proyectos.

Este libro se presenta de manera abierta y gratuita, estando a disposición de quien quiera hacer uso con la sola referencia a la fuente. La generación de conocimiento es la encomienda que más engrandece a las universidades y en este caso dado el carácter público de la Universidad de Granada y de los fondos europeos que han permitido la publicación no podía presentarse de otra forma.

Finalmente queremos agradecer a todos los que han hecho posible esta publicación, ya no solo a los colaboradores directos sino a todos aquellos que, durante

estos tres apasionantes años de Cátedra Jean Monnet, nos han ayudado a crecer en el conocimiento de la gestión de los proyectos y, sobre todo, a ser conscientes de la complejidad e importancia que está teniendo en nuestra a sociedad a todos los niveles.

Es obligada la mención expresa de Dorothy Kelly, Vicerrectora de Internacionalización de la Universidad de Granada durante prácticamente los tres años de vigencia de la cátedra, y de su equipo de trabajo, encabezado por la Directora de Internacionalización, Irene Pereira, quienes, junto al resto del personal de la Universidad de Granada han hecho posible esta publicación como excelente colofón a todas las actividades de docencia, transferencia, investigación y divulgación centradas en la metodología PM^2 de la Comisión Europea y por ende la importancia creciente de la gestión de proyectos en nuestras vidas. A todos ellos, ¡muchas gracias!

La proyectificación de la economía

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RESUMEN

La proyectificación es un fenómeno que puede observarse en todos los actores y en todas las partes de la economía, en todos los sectores industriales, en ciudades, comunidades y zonas rurales. La proyectificación aporta beneficios al sector privado y al público, así como al sector terciario, ya que el trabajo por proyectos optimiza el uso de los escasos recursos económicos. Los proyectos son un vehículo fundamental para aplicar la estrategia. Los procesos de transformación, automatización y digitalización de las empresas y de la administración pública se gestionan mediante proyectos. Como consecuencia, la proyectificación sigue aumentando con importantes implicaciones a nivel individual, organizativo y social en todas las economías del mundo.

Palabras clave: Proyectificación; Trabajo basado en proyectos; Sectores industriales.

1. INTRODUCCIÓN

El presente capítulo explicará qué se entiende por esta nueva palabra de moda "proyectificación", las razones por las que se ha convertido en una tendencia mundial en las dos últimas décadas, cómo se produce esta transformación de las economías, dónde, en qué países y en qué sectores de las economías se produce este movimiento, los requisitos previos del cambio, sus implicaciones y efectos y, por último, una perspectiva personal sobre el futuro desarrollo de esta tendencia.

El término proyectificación, amalgama de "proyecto" y "transformación organizativa", fue acuñado por Christophe Midler en 1995, cuando investigó cómo Renault se convirtió en una organización proyectificada. La proyectificación se define como la tendencia económica de la creciente difusión de proyectos como

forma cada vez más normal de organización empresarial (Midler, 1995; Lundin y Midler, 1998; Packendorff y Lindgren, 2014). Bredin y Söderlund definen la proyectificación como el paso de la producción repetitiva a procesos de trabajo no rutinarios y al uso de proyectos temporales (2011). Por tanto, la proyectificación describe el cambio en la cultura organizativa de cómo se perciben y gestionan los proyectos (Marnewick & Bekker, 2022).

Maylor et al. afirman que centrarse en una única organización como unidad de análisis se describe como "proyectificación organizativa" (2006), lo que hace referencia a la "estrecha" definición del fenómeno (Packendorff y Lindgren, 2014). En la última década se ha desarrollado un discurso "más amplio" sobre el fenómeno de la proyectificación en las organizaciones, las sociedades e incluso en las experiencias cotidianas (Hodgson et al., 2019). Existe "un interés por los procesos culturales y discursivos en una sociedad en la que se recurre a las ideas de proyectos" (Packendorff y Lindgren, 2014, p. 7). Lundin et al. la denomina "la sociedad de los proyectos" (Lundin et al., 2015). En este capítulo nos referimos a la transformación de la multitud de organizaciones y sectores industriales que en conjunto representan los cimientos de una economía, el llamado nivel meso de proyectificación.

La transformación organizativa de la gestión de proyectos a la proyectificación es una lucha que experimentan las organizaciones, descrita como "transformación importante y profunda" (Aubry & Lenfle, 2012:687). Esta profunda transformación se centra en la adopción o adaptación de las actuales estructuras, procesos, prácticas y símbolos de los proyectos asociados, por ejemplo, a la agilidad (Maylor y Turkulainen, 2019). La proyectificación es un fenómeno que lleva a las organizaciones a un viaje de mayor orientación al proyecto y considera los proyectos como una forma de organización, no en un único evento, sino más bien como viaje evolutivo que puede durar varios años. El destino es una organización totalmente proyectificada (Marnewick & Bekker, 2022). La proyectificación cambia fundamentalmente la orientación y el diseño de la organización (Maylor y Turkulainen, 2019). Este fenómeno se da en todos los sectores industriales, tipos de organización, países y economías (Packendorff y Lindgren, 2014). En la última década, la proyectificación se convirtió en una palabra de moda para describir el fenómeno generalizado en las economías actuales (Schoper et al, 2018).

El término economía define un ámbito social que hace hincapié en las prácticas, los discursos y las expresiones materiales asociadas a la producción, el uso y la gestión de recursos escasos (James, 2015). Una economía involucra su cultura, valores, educación, evolución tecnológica, historia, organización social, estructura política, sistemas legales y recursos naturales como factores principales. Estos factores dan contexto, contenido y establecen las condiciones y parámetros en los que funciona una economía. En otras palabras, una economía es un ámbito social de prácticas y transacciones humanas interrelacionadas que no se dan por sí solas.

En conclusión, puede afirmarse que la proyectificación de una economía puede describirse como la transformación que implica la creciente difusión de los proyectos y del trabajo basado en proyectos en todos los ámbitos económicos.

2. Proyectificación de la economía

el siguiente epígrafe pretende explicar el significado de la proyectificación para las distintas economías nacionales de todo el mundo. Para comprender el alcance de esta transformación en todo tipo de organizaciones de todos los sectores industriales, es importante subrayar esta evolución con datos y hechos, y no basarse únicamente en sensaciones subjetivas. Comparando los datos de proyectificación disponibles de tres países europeos y uno africano, se pueden extraer conclusiones sobre la evolución futura.

"La sabiduría popular convencional nos dice que la prevalencia de los proyectos va en aumento y todo el mundo puede observar que la sociedad que nos rodea ya está 'proyectificada', al menos en un sentido parcial" (Lundin, 1998, p. 13). Las organizaciones adoptan y escalan lo ágil de tal manera que toda la estructura y la cultura de la organización cambian para proyectarse. El núcleo de la proyectificación son los proyectos como actores clave con un papel muy influyente (Aubry & Lenfle, 2012). En las últimas décadas, los proyectos han pasado de tener una base técnica o de ingeniería a tener un carácter estratégico (Marnewick y Bekker, 2022). El fundamento de esta transformación es que cuanto más se proyecte una organización, más alcanzará y realizará sus estrategias.

2.1. *Razones para aumentar la proyectificación de las economías*

Varios factores han provocado el paso de la "vieja economía" a la "nueva economía", entre los que destacan la globalización y la digitalización. Este cambio fundamental en la estructura de las economías se corresponde con el cambio en la forma de organizarse a nivel de empresa (Eckstedt, 1999; Powell, 2002). Se necesitaban nuevas formas organizativas más flexibles pero, al mismo tiempo, eficientes y menos dependientes del control jerárquico y la coordinación burocrática.

La transformación organizativa hacia la proyectificación está impulsada por la idea de que las organizaciones proyectificadas son más ágiles, flexibles e innovadoras (Marnewick y Bekker, 2022). Este es especialmente el caso de las organizaciones impulsadas por la tecnología, como las instituciones financieras, los fabricantes de automóviles, las empresas de TI o la industria aeroespacial.

Se parte de la base de que las organizaciones y, en consecuencia, también las economías nacionales deben ser más flexibles e innovadoras, y que su capacidad para resolver problemas complejos aumentará con la capacidad organizativa de proyectificación.

Las razones de la proyectificación de las organizaciones y, en consecuencia, de las economías pueden encontrarse tanto fuera, en los factores ambientales externos, como dentro, en el desarrollo de las organizaciones.

Las mega tendencias actuales como la digitalización, el cambio climático, la demografía, la urbanización, el crecimiento económico, el consumo energético, la conectividad y la geopolítica (ESPAS, 2023) conducen a una elevada escala de volatilidad, incertidumbre, complejidad y ambigüedad de los factores ambientales externos para las organizaciones. Con un número suficiente de gestores de proyectos competentes, una organización o economía nacional podrá afrontar mejor los cambios y transformaciones de los entornos actuales en rápida evolución.

Según Schoper & Ingason (2023), otras de las razones del auge de los proyectos en las organizaciones son los desarrollos internos y externos de las empresas. Una de las dificultades que existe cuando se habla de la proyectificación es que no existe un uso coherente del término "proyecto". Los proyectos se utilizan para describir un esfuerzo único y complejo. En algunas organizaciones depende de la duración de la tarea única. En otras organizaciones depende del número de personas implicadas en la tarea. En la mayoría de las organizaciones, depende de la singularidad del alcance, por ejemplo, crear un centro de vacunación para 5.000 personas al día en un plazo de veinte días.

Además, se puede observar que una asignación denominada "proyecto" parece sonar más atractiva para un trabajador, ya que da más responsabilidad individual que una "tarea" normal. Los jefes son conscientes de ello y suelen utilizar el término "proyecto" para motivar a sus empleados, aunque se trate de una tarea común.

Además, también hay razones más profundas que explican el aumento de los proyectos en las organizaciones. Una explicación importante del fenómeno es que el trabajo rutinario disminuye constantemente debido a la automatización y digitalización en curso de los procesos estándar en las organizaciones, ya sea en RRHH, producción, ventas o logística. En consecuencia, quedan más recursos libres para el trabajo de proyectos.

Otra razón es que los productos y sistemas creados y que tienen éxito en el mercado deben seguir desarrollándose, siguiendo el lema: "el éxito del producto da lugar a proyectos de seguimiento". Por ejemplo, un fabricante de smartphones tiene que seguir desarrollando un nuevo teléfono sucesor, ya que el producto original es responsable de un alto porcentaje de la facturación de la empresa. Al cabo de un año, las ventas del modelo actual se estancarán. La organización necesita un sucesor con nuevas innovaciones que tenga tanto éxito como el modelo predecesor. Las instalaciones de producción que se construyeron para el modelo anterior tienen que utilizarse de nuevas formas, los empleados de I+D necesitan nuevos retos, el marketing y las ventas necesitan un nuevo producto y la logística tiene que utilizar sus complejos sistemas informáticos. El éxito del producto anterior obliga a una organización a crear otro producto de éxito. Los proyectos son el motor que hace que una organización funcione y crezca de la mejor manera posible. Sin proyectos, una organización se queda parada, y eso significa retraso.

El quinto argumento es que los proyectos están construyendo el futuro. Los proyectos son los vehículos de la transformación y el cambio. De nada sirve una estrategia corporativa del consejo de administración de una empresa si no se emprende un proyecto para plasmar las ideas en algo real: un nuevo producto sostenible, un nuevo sitio web, un servicio innovador de atención al cliente, la adquisición de otra empresa, nuevos edificios de oficinas, una nueva campaña de marketing, nuevos procesos en la cadena de suministro o la implantación de nuevos métodos de trabajo. La creación de cualquier innovación se basa en proyectos. Toda estrategia corporativa necesita un proyecto o programa para realizarse y aplicarse.

Otro argumento sería que los proyectos son el medio para reunir a diversos expertos, ya sean de distintas organizaciones, departamentos o áreas funcionales. Las empresas de hoy en día son tan complejas que se necesita un grupo de especialistas diferentes para abordar correctamente todos los aspectos de las tareas, como el financiero, el jurídico, el técnico o el informático. Los equipos de proyecto heterogéneos garantizan un pensamiento diverso y una mejor toma de decisiones, lo que genera soluciones innovadoras.

Por último, cuantos más proyectos ejecute una organización de forma eficiente y eficaz, más éxito tendrá la organización. Las empresas con un alto nivel de éxito innovador muestran una proporción de actividad de proyectos superior a la media (Zaman et al., 2020). En otras palabras: las empresas con menos éxito realizan menos proyectos.

Se puede concluir que la aplicación de la gestión de proyectos hace que las organizaciones sean más flexibles e innovadoras, aumenta su capacidad para resolver problemas complejos y para hacer frente al entorno cambiante. No hay éxito empresarial futuro sin proyectos. Cada vez son más los directivos que comprenden este contexto y, en consecuencia, implantan y fomentan las capacidades de gestión de proyectos en sus organizaciones. Ésta es la razón por la que se observa el rápido aumento de los proyectos en las organizaciones de todo el mundo. La creciente proyectificación no sólo repercute en la competitividad de una empresa individual, sino que también refleja el desarrollo económico de toda una sociedad.

2.2. *Las dimensiones cuantitativa y cualitativa de la proyectificación*

La proyectificación de una economía incluye una dimensión cuantitativa y otra cualitativa.

La dimensión cuantitativa está relacionada con la proporción de trabajo realizado en proyectos dentro de las empresas. El aumento de la proyectificación a nivel de empresa muestra que la proporción de trabajo en proyectos está aumentando, mientras que la proporción de trabajo "normal" u "ordinario" que tiene lugar en la parte permanente de una organización está disminuyendo. En este sentido cuantitativo, la proyectificación podría medirse con una ratio que indique la proporción de trabajo de proyectos en una organización. Si la proyectificación no sólo tiene lugar

a nivel de una empresa individual, sino entre todas las empresas de un sector, una industria o una economía, puede decirse que toda la industria y la economía están "proyectificadas". En resumen, la ratio de proyectificación de las distintas economías nacionales puede agregarse a escala mundial. PMI estima que, para 2027, los empleadores necesitarán 88 millones de personas en funciones orientadas a la gestión de proyectos (PMI, 2017). Las estadísticas mundiales indican que, en total, 3.451 millones de personas mayores de 15 años estaban empleadas en todo el mundo en 2021 (Destatis, 2021). Así pues, el 2,5 % de todos los empleados del mundo trabajarían en funciones orientadas a la gestión de proyectos, lo que parece una estimación bastante conservadora. Sin embargo, esta cifra indica la creciente relevancia de los gestores de proyectos para las economías nacionales de todo el mundo.

La dimensión cualitativa de la proyectificación corresponde al desarrollo cualitativo del trabajo que se ejecuta en empresas y organizaciones. La creciente aplicación y uso de proyectos hace que las organizaciones sean más flexibles, más innovadoras y más capaces de resolver problemas complejos, además de menos rígidas (Hanisch & Wald, 2017; Hodgson, 2004). Asimismo, la proyectificación lleva a cambiar la lógica predominante de coordinación y control. Se supone que las organizaciones proyectificadas son menos jerárquicas, menos burocráticas y se coordinan mediante mecanismos menos formales, como la coordinación basada en roles, las redes y la confianza (Modig, 2007). La figura 1 muestra la dimensión cuantitativa y cualitativa del aumento de la proyectificación de las economías:
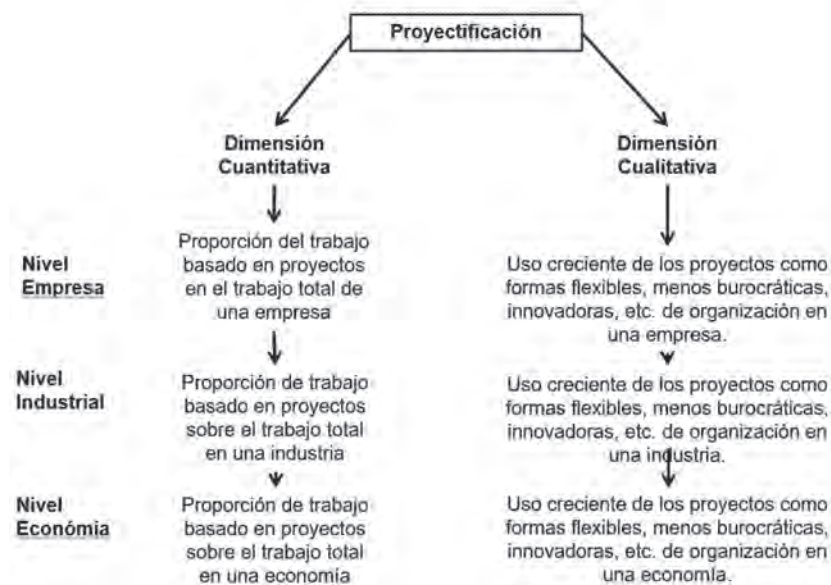
Figura 1. Proyectificación como desarrollo cuantitativo y cualitativo
(fuente: Wald et al., 2015)

Un alto coeficiente cuantitativo de proyectificación es el requisito previo para que el desarrollo cualitativo tenga un impacto importante a nivel de empresa, industria y economía.

"Mientras que la estandarización se ha descrito como una característica central de la industrialización y la producción en masa, se ha descubierto que la gestión de proyectos es el motor del cambio y la innovación" (Cerne & Jansson, 2019). Los proyectos se consideran vehículos para aplicar la estrategia, el cambio y la transformación en las organizaciones. Pero, ¿son las organizaciones y, en consecuencia, las economías nacionales como suma de las actividades económicas de todas las organizaciones de un país más innovadoras, más ágiles, más rápidas y más exitosas? Esta pregunta aún no puede responderse completamente debido a la complejidad de los factores que influyen. No obstante, en el próximo apartado se recogerán algunos argumentos a favor del aumento de los proyectos en las organizaciones.

2.3. *Retos para la medida de la proyectificación*

A la hora de cuantificar el grado de proyectificación lo ideal sería medir la cuota de trabajo de los proyectos en una economía a partir de medidas macroeconómicas establecidas del valor añadido, como el Producto Interior Bruto (PIB), el Producto Nacional Bruto (PNB) o el Valor Añadido Bruto (VAB), ya que esta cuota podría compararse directamente con el VAB o el PIB. Sin embargo, esta metodología se enfrenta a algunos retos. En general, cada proyecto influye directa o indirectamente en el rendimiento, la producción, el resultado o el valor de una organización. Este impacto es fácilmente medible en el caso de los proyectos de clientes externos que crean ingresos directos, pero es difícil de cuantificar en el caso de los proyectos internos. Todos los ingresos directamente atribuibles a cualquier proyecto de una organización tendrían que registrarse para obtener una medición orientada a los resultados del trabajo de los proyectos en una organización. Sin embargo, esta medición sólo sería aplicable a los proyectos que generan ingresos directamente. Los proyectos internos, como los proyectos de cambio, o los proyectos de infraestructura, como la construcción de un nuevo edificio de oficinas o la instalación de un nuevo sistema informático, no se tendrían en cuenta, ya que no conducen directamente a un aumento de los ingresos. Por lo tanto, no es posible una metodología de medición de la proyectificación basada en los factores de producción del proyecto (Schoper et al, 2018).

La proporción de trabajo de proyecto sobre el trabajo total en una organización se identificó como indicador adecuado para la proyectificación. Esta medida orientada a los insumos puede aplicarse a todos los tipos de proyectos, por ejemplo, proyectos externos generadores de ingresos y proyectos internos. Además, puede aplicarse a todo tipo de sectores y es independiente de factores organizativos (tamaño, estructura, etc.). Esta medida se aplicó sistemáticamente a todas las economías nacionales incluidas en esta investigación.

Al medir el grado de proyectificación de forma cuantitativa, Wald et al. decidieron no medir la producción, sino la entrada de trabajo de proyectos en una empresa, como se muestra en la figura 2 (Wald et al., 2015).
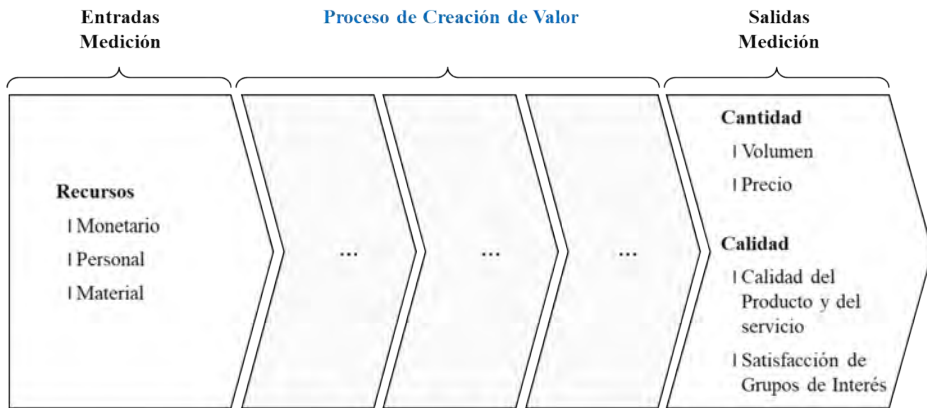
Figura 2: Entradas vs Salidas del proceso de medición de la generación de valor
(Fuente: Wald et al., 2015)

Un aumento de la proyectificación a nivel de empresa indica que la proporción de trabajo de proyectos está aumentando, mientras que la proporción de trabajo normal en los departamentos permanentes de una organización, como Compras, Producción, Logística, Gestión de Recursos Humanos, Finanzas o Control, está disminuyendo. En este sentido, la proyectificación se considera la ratio que indica la proporción de trabajo de proyectos en una organización. El resultado son las cifras de proyectificación a nivel de empresa. El grado de proyectificación (PF) de una empresa i (i,...,n) se indica como PF_i.

El PF de un sector económico individual j *(j,...,m)* se calculó como la media de todas las empresas i de un sector j

$$(1) \qquad PF_j = \frac{(\sum_i^n PF_i)}{(n)} \quad \text{para todo i } \epsilon \text{ J}$$

Finalmente, el *PF* de toda la economía *e* fue calculada como suma de las proyectificaciones de todos los sectores PF_j ponderadas por la cuota de cada sector en el total del GVA.

$$(2) \qquad PF_e = \sum_j^m PF_j \cdot \sigma_j$$

La Figura 3 facilita una visión del proceso de agregación de datos.

Entidades	Industria	Valores Nacionales
(Empresas, Organizaciones)	(Clasificación vía código WZ 2008)	(DESTATIS)

Sectores económicos (en billones de euros)	2013
Industrias manufactureras, excluida la construcción	659.17
Incluida la industria del procesado	561.29
Construcción	116.49
Proveedores de servicios públicos, educación y salud.	458.39
Comercio, transporte, restauración	393.36
Sector Inmobiliario y Alojamientos	281.34
Proveedores de servicios corporativos	270.30
Proveedores de otros servicios	103.76
Proveedores de servicios financieros y aseguradoras	103.17
Información y comunicación	117.98
Agricultura, montes y pesca	21.66
Todas las industrias (producto interior)	2,525.61

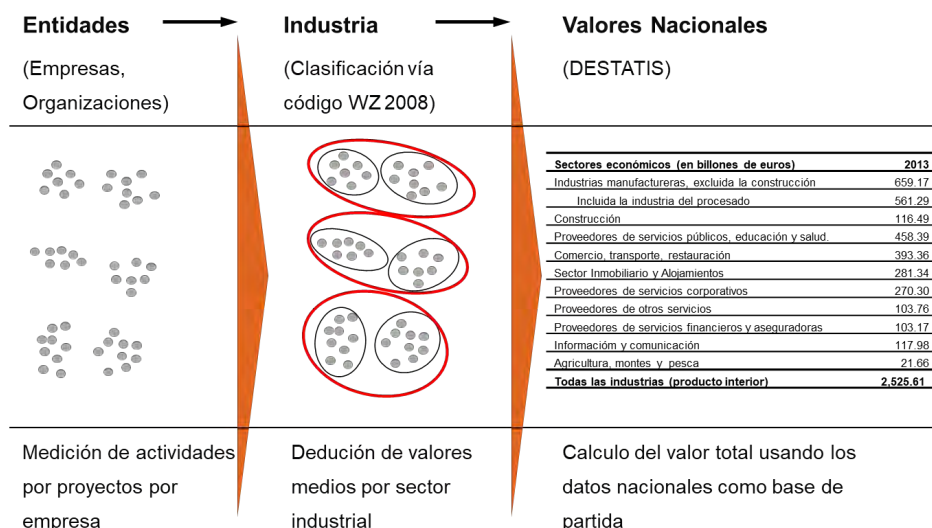| Medición de actividades por proyectos por empresa	Deducción de valores medios por sector industrial	Calculo del valor total usando los datos nacionales como base de partida

Figura 3: Proceso de agregación de datos (Fuente: Wald et al., 2015: 26

Si la proyectificación tiene lugar en todos los niveles de las empresas, entre todas las empresas de cada industria y en todos los sectores de una economía, puede decirse que toda la economía está proyectificada.

En conclusión, una medición directa de la proporción de trabajo basado en proyectos correspondiente a indicadores nacionales como el VAB o el PIB parece descartada, ya que los datos necesarios no existen ni para las medidas orientadas a los insumos ni para las orientadas a la producción. Por este motivo, se concluyó en la necesidad de una forma alternativa de medición que incluyera todos los tipos de proyectos y tipos de industrias, basada en la realización de encuestas a partir de grandes muestras de datos, lo que hace que estas mediciones macroeconómicas sean muy elaboradas y costosas.

2.4. *Presentación de cuatro economías nacionales: Alemania, Noruega, Islandia y Sudáfrica*

El primer país en iniciar la medición macroeconómica de la economía nacional fue Alemania en 2014. Gracias a la financiación de la asociación nacional de gestión de proyectos GPM, Wald et al. (2015) desarrollaron por primera vez el instrumento de medición de la proyectificación y lo aplicaron a la economía alemana. Este estudio se replicó en Noruega (Wald et al., 2016) e Islandia y, posteriormente, en 2018, en Sudáfrica (Marnewick & Bekker, 2022) con el apoyo financiero de la International Project Management Association (IPMA). En este epígrafe se resumen y agregan las conclusiones de los cuatro estudios. El objetivo es comparar el grado de proyectificación en las cuatro economías diferentes.

Para garantizar la coherencia y la comparación entre los cuatro estudios nacionales, se utilizó el instrumento de medición de la proyectificación desarrollado por Wald et al. (2015) para los cuatro estudios de investigación. Se utilizó el mismo cuestionario en los cuatro países que forman parte de este gran proyecto de investigación.

En Alemania se contrató a una organización de investigación profesional para extraer una muestra aleatoria estratificada basada en la clasificación NACE con diez sectores industriales principales. Se realizaron 500 entrevistas a directivos de organizaciones privadas y públicas mediante CATI (entrevistas telefónicas asistidas por ordenador) para seis grandes sectores económicos. Los cuatro sectores económicos restantes se estimaron a partir de entrevistas a expertos.

En Noruega, la recogida de datos se realizó distribuyendo la encuesta por correo electrónico a las 54.101 empresas registradas en la base de datos Proff Forvalt, lo que dio lugar a 1.412 respuestas utilizables. Como sector industrial principal en Noruega, el petróleo y el gas se desglosaron como un subsector propio. La construcción se agrupó con otros proveedores de servicios, proveedores de servicios corporativos y propiedad y alojamiento.

En Islandia, la recogida se llevó a cabo mediante el envío de correos electrónicos a 1.000 de las mayores empresas del país, seguido de entrevistas telefónicas a través de una empresa de investigación profesional. La respuesta final consta de 142 empresas con un tamaño medio de 125 empleados.

En Sudáfrica se contrató a una organización de investigación profesional para recopilar los datos con ejecutivos, ya que pueden ofrecer una visión general de los ingresos, beneficios y presupuestos de proyectos de la organización. Se recogieron 303 respuestas válidas que se utilizaron para el análisis de los datos. Las respuestas representan a 303 organizaciones diferentes de la economía sudafricana.

Los cuatro países -Alemania, Noruega, Islandia y Sudáfrica- representan una muestra diversa de cuatro economías nacionales: Alemania es la cuarta economía más grande, Noruega ocupa el puesto 28, seguida de Sudáfrica, en el puesto 32, e Islandia, una economía muy pequeña, en el puesto 106. La Tabla 1 compara las cuatro economías nacionales en relación con sus principales sectores industriales, el tamaño de la población, el Producto Interior Bruto (PIB) del año 2021, la tasa de crecimiento económico en los últimos cinco años, la tasa de desempleo nacional y el Índice de Desarrollo Humano (IDH). El IDH fue creado por las Naciones Unidas para subrayar que no sólo el crecimiento económico, sino también las personas y sus capacidades deben ser los criterios para evaluar el desarrollo de un país. Los países con una puntuación en el IDH superior a 0,8 tienen gobiernos estables, una educación y una sanidad asequibles y generalizadas, una elevada esperanza de vida, una buena calidad de vida y una economía potente y en crecimiento (fuente: Informes sobre Desarrollo Humano de la ONU, 2023).

Tabla 1 Datos macroeconómicos de Alemania, Noruega, Islandia y Sudáfrica

	Alemania	**Noruega**	**Islandia**	**Sudáfrica**
Ubicación	Europa Occidental	Europa del Norte	Europa del Norte	África
Principales sectores Industriales	Automoción, Electrotecnia, Química, Maquinaria y equipos	Petróleo y gas, marisco, productos de la industria de gran consumo energético	Turismo, pesca, aluminio	Minería, transporte, energía, industria manufacturera, turismo, agricultura
Población	83,2 m	5,4 m	0,37 m	59,4 m
PIB (2021)	4225 b	482 b	5,5 b	419 b
PIB/capita	51 k€	89 k€	68 k€	7 k€
Ranking Macroeconómico	4	28	109	32
Tasa media de crecimiento económico	1,1	1,8	1,4	0,7
(últimos 5 años) Tasa de Desempleo	3	3,2	4	33,9
HDI (Indice de Desarrollo Humano)	0.942	0.961	0.959	0.71
Ranking HDI	9	2	3	109

La tabla 1 muestra la gran diversidad de las cuatro macroeconomías nacionales de Alemania, Noruega, Islandia y Sudáfrica en cuanto a tamaño de su población, resultados económicos, principales sectores industriales, tasa de desempleo e Índice de Desarrollo Humano. Por consiguiente, se puede concluir que los cuatro países suponen una muestra representativa de las 195 economías nacionales.

Los cuatro estudios económicos nacionales aportan datos empíricos sobre el panorama de los proyectos en las organizaciones. Los datos de las cuatro economías muestran que la mayoría de los proyectos en las organizaciones son internos, mientras que los proyectos externos visibles que se llevan a cabo para clientes externos sólo representan entre el 16% y el 22%. Este dato es importante, ya que demuestra que la mayoría de los proyectos son internos y pasan desapercibidos

para el público. Los proyectos externos más visibles representan sólo una pequeña parte de todo el panorama de proyectos de una empresa. Los famosos fracasos, por ejemplo, de grandes proyectos de infraestructuras de los que se hace eco la prensa y que son objeto de debates públicos, podrían no ser, por tanto, casos representativos para evaluar el estado general, la calidad y el éxito de la gestión de proyectos en las empresas y, en consecuencia, en una economía (Brady y Davies, 2010).

Los proyectos internos más frecuentes en Alemania son los de marketing/ventas (22%) y los de TIC (20%), mientras que los de I+D y desarrollo de nuevos productos son menos frecuentes (13%). Los proyectos de I+D son poco frecuentes en los sectores orientados a los servicios (10%), mientras que son el doble de importantes en la industria manufacturera (22%). Lo mismo ocurre con los proyectos externos, que son más frecuentes en la industria manufacturera y en el sector de las TIC.

En Noruega, los proyectos internos representan el 78% de todos los proyectos, y la categoría más frecuente es I+D y desarrollo de nuevos productos. Los proyectos externos son más frecuentes en los proveedores de servicios (incluidos la construcción, el sector inmobiliario y los proveedores de servicios corporativos), así como en las TIC.

En Islandia, los proyectos internos representan el 87% de todos los proyectos; no hay diferencias entre la frecuencia de los distintos tipos de proyectos internos. Los proyectos externos son más frecuentes en la industria manufacturera, los servicios financieros, los seguros y los proveedores de servicios.

En Sudáfrica, la mayoría de los proyectos son proyectos de I+D internos a la organización. Los proyectos de clientes externos constituyen la tercera parte más importante de todos los proyectos realizados. El tipo de proyectos que ocupa el último lugar son los proyectos internos de tecnología de la información y la comunicación (TIC) (Marnewick & Bekker, 2022).

En Alemania y Noruega, la proporción de proyectos externos en la industria manufacturera es relativamente alta (24% y 25%), mientras que en Islandia es del 17%. Los proyectos externos representan el 16,7% de todos los proyectos en Sudáfrica, mientras que Islandia muestra la proporción más baja de proyectos externos, con un 13%. Como posible explicación, las industrias manufactureras dominantes en Sudáfrica son la minería, el transporte y el turismo, y en Islandia es la transformación del aluminio, industrias que podrían basarse predominantemente en tareas más repetitivas y que, por tanto, están más orientadas a los procesos. No obstante, para comprender mejor esta observación es necesario realizar más investigaciones cualitativas y cuantitativas en el futuro.

2.5. *Situación de la proyectificación en Alemania, Noruega, Islandia y Sudáfrica*

La proporción del trabajo por proyectos sobre el total de horas de trabajo en el primer estudio realizado en Alemania en 2013 fue del 34,7 %. En Noruega, el

estudio macroeconómico muestra un porcentaje de proyectos del 32,6 % un año después, en 2014, y en Islandia del 27,7 % ese mismo año. Cinco años más tarde, en 2019, la proporción del trabajo por proyectos sobre el total de horas de trabajo en Sudáfrica era del 39,3 %.

Estos cuatro valores indican que aproximadamente un tercio de todas las actividades económicas en las cuatro economías se realiza en proyectos. Como no existen estudios similares que hayan intentado medir el grado de proyectificación de toda una economía, solo se pueden comparar estos resultados con la estimación del Banco Mundial, que afirma que el 21 % del PIB mundial se generó a través de proyectos (Scranton, 2015).

La figura 4 muestra la proporción de trabajo en proyectos en las economías nacionales de Alemania, Noruega, Islandia y Sudáfrica.

Figura 4 Porcentaje de trabajo en proyectos en las economías nacionales de Alemania, Noruega, Islandia y Sudáfrica (fuente: Schoper et al 2018; Marnewick & Bekker, 2022)
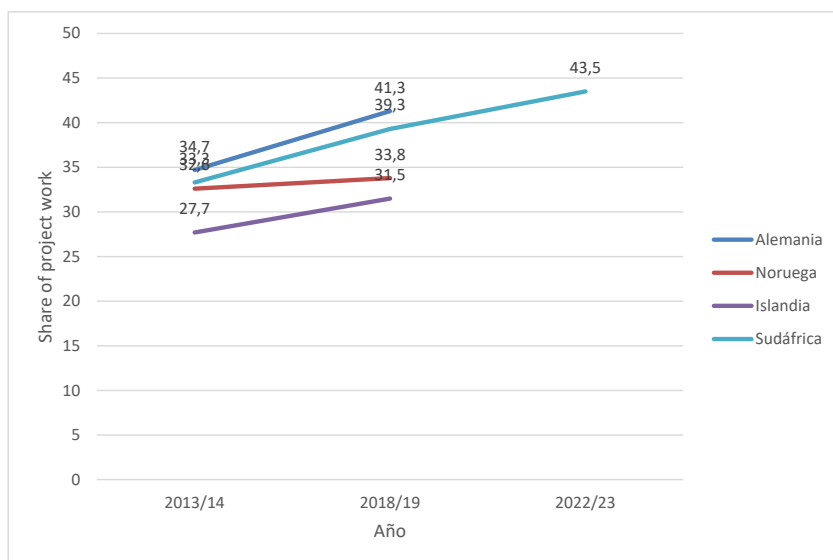
2.6. *Análisis de la proyectificación en diferentes sectores industriales*

Aunque las cuatro economías nacionales muestran a primera vista resultados bastante similares, con una cuota media de proyectificación del 37% del PIB nacional en 2018, el análisis de los sectores industriales en las cuatro economías muestra niveles de proyectificación mucho más diversos.

Al comparar los sectores individuales de los cuatro países en la tabla 2, encontramos diferencias importantes. En Alemania e Islandia, la cuota de proyecto para

la construcción (80%) y los proveedores de servicios corporativos (60%) fueron estimados por expertos. En estos sectores, los expertos suponen que el valor añadido se realiza casi exclusivamente en proyectos y sólo los procesos administrativos se llevan a cabo en entornos no temporales. Los resultados en Sudáfrica para la construcción (64,4%) y los proveedores de servicios a empresas (53%) muestran que estas estimaciones son plausibles. En el caso de Noruega, no existen cifras detalladas para estos dos sectores.

La misma estimación de la proyectificación basada en expertos del sector industrial tuvo lugar en los dos sectores agricultura, silvicultura y pesca en Alemania e Islandia. En estos sectores se supuso que el nivel de proyectificación era bajo, del 4%. Los resultados mucho más elevados para el sector de la agricultura, la silvicultura y la pesca en Noruega (28,6%) y Sudáfrica (20,1%) son plausibles, ya que sus economías dependen en gran medida de los tres sectores industriales de la agricultura, la silvicultura y la pesca y, por tanto, están más organizadas profesionalmente que en Alemania. En el caso de Islandia, donde los sectores de la agricultura y la pesca también desempeñan un papel económico importante, estas estimaciones deberían controlarse en un futuro segundo estudio.

Para el sector inmobiliario industrial, los expertos estimaron que la mayoría de los procesos son repetitivos y administrativos y, por tanto, el nivel de proyectificación en Alemania es muy bajo, con un 2%. De nuevo, Islandia adoptó esta estimación baja también para su economía nacional. Sin embargo, los resultados más recientes de Sudáfrica de 2018/19 muestran una cuota de proyectificación del 25% en el sector inmobiliario. Cabe suponer que la cuota en las otras tres economías también podría ser superior a la estimada anteriormente.

Se observan diferencias importantes en el sector manufacturero: Islandia muestra una cuota muy baja de proyectificación (3,4%), mientras que Alemania (41,7%) y Noruega (47,2%) la sitúan bastante por encima. En Islandia, el sector manufacturero contribuye en un 8,9% al VAB nacional, y está menos diversificado que la industria manufacturera en Alemania. En Noruega y Sudáfrica, el sector manufacturero se desglosó a su vez en actividades manufactureras y de petróleo y gas. En el caso del petróleo y el gas, la proporción de trabajos de proyectos es del 50,7% y del 34,4% en Sudáfrica. Estos resultados muestran que en futuras investigaciones debería realizarse un análisis más detallado de los sectores industriales y sus principales subsectores.

Otras diferencias interesantes se encuentran en el sector del comercio minorista, el transporte y el turismo. Alemania, con un 42%, muestra un alto índice de proyectificación, mientras que Noruega, con un 13,4%, muestra un índice bajo. Una de las razones de estas diferencias podría ser el diferente tamaño de la población y la consiguiente profesionalización del sector. Pero, una vez más, es necesario seguir investigando para comprender mejor las diferencias en este sector.

Hay más diferencias en el sector público, la educación y la sanidad: en Noruega, el porcentaje de proyectificación es sólo del 14,2% y en Alemania, del 17,8%, mientras que Islandia muestra un porcentaje mucho mayor, del 33,3%, y Sudáfrica, del 35,3%. Una vez más, es necesario seguir investigando para comprender mejor las diferencias en este sector industrial especial.

La siguiente tabla 2 muestra las cuotas exactas de trabajo por proyectos en los diferentes sectores industriales de las cuatro economías nacionales:

Tabla 2 Distribución del trabajo de proyecto en los distintos sectores industriales de las cuatro economías nacionales de Alemania, Noruega, Islandia y Sudáfrica

Código NACE	Sector Industrial	Proporción de trabajo en proyectos			
		Alemania	**Noruega**	**Islandia**	**Sudáfrica**
		2013	**2014**	**2014**	**2018**
A	Agricultura, silvicultura y pesca	*4,0%**	28,6%	*4,0%**	20,1%
B-E	Fabricación	41,9%	37,6%	3,4%	37,2%
	Oil&Gas		50,7%		34,4%
F	Construcción	*80,0%**		*80,0%**	64,4%
G-I	Comercio/transporte/ turismo	42,0%	13,4%	18,2%	32,1%
J	Información / Comunicación	37,7%	48,0%	47,8%	49,0%
K	Finazas y Seguros	23,0%	21,4%	34,2%	33,3%
L	Inmobiliaria	*2,0%**		*2,0%**	24,9%
M-N	Servicios Corporativos	*60%**		*60,0%**	53,0%
O-Q	Sector Público; educación; sanidad	17,8%	14,2%	33,3%	35,3%
S	Otros Servicios	23,0%		42,7%	48,1%
	Otros PS+ proveedores de servicios a empresas+ construcción		40,5%		
	Minería				32,0%
	Total	**34,7%**	**32,6%**	**27,7%**	**39,3%**

*Leyenda: * Significa que el valor específico se basa en la estimación de expertos nacionales*

Aunque entre los cuatro estudios hay cinco años de diferencia entre el primero de Alemania y el último de Sudáfrica, esta diferencia no puede explicar las grandes diferencias encontradas entre los distintos sectores industriales de las cuatro economías analizadas. Se necesitan más estudios cualitativos y cuantitativos en todos los sectores industriales para comprender mejor la situación de la proyectificación y su evolución futura.

3. Prerrequisitos e implicaciones de la proyectificación

Conforme los entornos empresariales se hacen más complejos, las organizaciones se enfrentan a una incertidumbre cada vez mayor, al tiempo que aumenta la presión empresarial en favor de una mayor eficiencia e innovación debido a la competencia mundial, combinada con la reducción de los recursos de que disponen las empresas a causa de la presión de los costes y la escasez de trabajadores cualificados en la mayoría de las economías desarrolladas.

Una de las principales consecuencias de estas difíciles condiciones ambientales es el aumento del modo de creación de valor orientado a proyectos en las organizaciones. Este cambio transformacional significa que las empresas actuales se enfrentan a estructuras organizativas y plantillas en evolución que reflejan la naturaleza cambiante y temporal del trabajo. Ser moldeado y remodelado se convierte en la nueva normalidad de las empresas. En consecuencia, las organizaciones se convierten en lugares de reestructuración continua (Wilkinson, 2022). Los proyectos se han asociado con el desarrollo y la innovación, pero también con la noción de control, claridad y rendimiento. Esta dualidad hace que los proyectos resulten muy atractivos para las organizaciones (Fred, 2020).

3.1. *Pilares de la proyectificación de las economías*

La creciente proyectificación de una economía está influenciada e influida a la vez por diversas partes interesadas, como individuos, organizaciones, redes organizativas, pero también por las normas, estándares y creencias sociales circundantes (Wagner et al, 2021).

Basándose en la teoría institucional de Scott, se puede definir una economía también como un sistema de "elementos regulativos, normativos y culturales-cognitivos que, junto con las actividades y los recursos asociados, proporcionan estabilidad y sentido a la vida social" (Scott, 2014: 56).

El pilar regulativo se centra en la capacidad de las instituciones para restringir y regularizar el comportamiento, el cumplimiento de las normas puede ser supervisado y sancionado por las autoridades estatales.

El pilar normativo hace hincapié en las reglas que prescriben derechos y privilegios, así como responsabilidades y deberes, basados en la aceptación de normas, estándares y comportamientos. El incumplimiento puede llevar a la exclusión de un grupo social.

El pilar cultural-cognitivo se centra en los supuestos compartidos que constituyen la naturaleza de la realidad social y los marcos a través de los cuales se elabora el significado. Describe las creencias, percepciones y actitudes compartidas por los miembros de un grupo. Éstas pueden ser inconscientes, pero afectan a la comunicación y la colaboración y conducen a un comportamiento conforme por parte de los actores de un grupo.

Entre los tres pilares de la teoría institucional desempeñan un papel importante los intermediarios, por ejemplo, los organismos gubernamentales, las empresas privadas y públicas, las asociaciones industriales, los sindicatos, las universidades o las asociaciones profesionales (Scott, 2014). Los factores sociales, económicos y políticos constituyen la estructura institucional de un entorno específico que proporciona ventajas a las empresas que se dedican a determinados tipos de actividades. Las organizaciones actuarán con mayor eficiencia y eficacia si reciben apoyo institucional.

Las acciones reguladoras en una economía son la legislación, el desarrollo de leyes y reglamentos que afectan al trabajo relacionado con proyectos y la difusión de proyectos en una economía (Wagner et al. 2022). Un ejemplo de ello sería si un gobierno prescribe un estándar educativo específico de cualificación y certificación para los profesionales de proyectos en proyectos públicos como infraestructuras o proyectos administrativos públicos. Las medidas reguladoras podrían llegar tan lejos que la educación en gestión de proyectos de los estudiantes en asignaturas específicas se convirtiera en una normativa.

Una medida normativa para fomentar la proyectificación en una economía sería una norma que se utilizara para la educación y la exigencia de una norma de certificación para proyectos públicos, la prescripción de normas de gestión de proyectos financiadas por el público o el gobierno, o normas específicas de gobernanza de proyectos para proyectos públicos. Otra medida normativa podría ser la oferta de aprendizaje basado en proyectos para alumnos y estudiantes en escuelas y universidades. Otra acción normativa sería la existencia de un sistema de carrera de gestión de proyectos en las organizaciones y administraciones públicas.

Las acciones culturales-cognitivas para fomentar la proyectificación en una economía podrían ser el uso de un lenguaje de gestión de proyectos, programas y carteras y una mentalidad de proyecto por parte de los funcionarios del Estado y los periodistas en la prensa, o hacer públicos a los gestores de proyectos públicos importantes como modelos de conducta a imitar. Estos ejemplos de medidas institucionales tienen el potencial de influir positivamente en el nivel de proyectificación de una economía.

3.2. *Implicaciones de la proyectificación*

La proyectificación repercute en todas las partes y en todos los agentes de una economía, sus instituciones y organizaciones, pero también en su cultura y su

sistema educativo. La presión para innovar continuamente en las organizaciones refuerza la proyectificación de todos los agentes e instituciones de una economía.

Henning y Wald demostraron en su estudio macroeconómico que la proyectificación tiene efectos positivos en la economía en términos de volumen de producción, capacidad de innovación, rentabilidad, empleo e ingresos. Sin embargo, muestran que la proyectificación también puede tener efectos negativos que se observan en sectores como la agricultura, donde el mayor uso de proyectos puede provocar una disminución del empleo e incluso de los ingresos. Como consecuencia principal, el uso de formas temporales de organización no puede recomendarse sin reproches, sino que depende del sector económico y de las interdependencias sectoriales (Henning & Wald, 2019).

La transformación de las economías hacia una economía cada vez más basada en proyectos y no permanente incluye áreas de incertidumbre, nuevas dinámicas y una redefinición de los roles tradicionales de empleadores y empleados. Los acuerdos tradicionales entre empleado y empleador pueden estar cambiando. Es probable que cada vez más personas se conviertan en autónomos como trabajadores por proyectos. En lugar de trabajar para un empleador, las personas podrían vender sus servicios a empresas y esta relación contractual se basa en plataformas inciertas. En el mejor de los casos, esta nueva economía puede ser una buena evolución, ya que las personas pueden elegir sus proyectos en función de sus capacidades y conocimientos.

Sin embargo, son muchas las consecuencias negativas de esta tendencia, por ejemplo, la pérdida de derechos laborales, como el pago de los días de enfermedad, la baja por maternidad o la inseguridad en la planificación en un mercado laboral en el que el personal no sabría qué pasaría después de entregar su proyecto. Sería un mercado en el que la mayoría se arriesgaría y aceptaría demasiados proyectos para evitar quedarse sin trabajo, lo que aumentaría los niveles de estrés. Las personas se verían obligadas a asumir una mayor responsabilidad propia en distintos ámbitos, como la formación, el desarrollo profesional y la educación continua. El papel del lugar de trabajo tradicional como institución social cambiaría como consecuencia de la proyectificación. Las consecuencias sociales y de sociedad de la pérdida de esta institución aún no están claras.

Jacobsson y Jalocha definen cuatro imágenes emergentes de esta tendencia omnipresente hacia la proyectificación: la proyectificación como enfoque de gestión, la proyectificación como tendencia social, la proyectificación como estado humano y la proyectificación como cuestión filosófica (2021). Estas cuatro perspectivas muestran que el fenómeno de la proyectificación, que en su día se derivó de la perspectiva organizativa y de gestión, representa hoy una parte cada vez más relevante de la vida de las personas, las organizaciones, las economías y las sociedades.

El "nivel de análisis de la proyectificación ha pasado de un caso en el que la proyectificación se reconocía únicamente como una trayectoria de la reestructu-

ración organizativa, a considerar la proyectificación como un fenómeno fundamentalmente socialmente cambiante con consecuencias complejas" (Jacobsson y Jalocha, 2021:1598).

4. Perspectiva. Una mirada al futuro

La digitalización y la automatización conducen a una disminución del trabajo funcional también en las empresas orientadas a procesos. Esto corresponde a la cuarta fase de la transición organizativa analizada por Midler, la transformación de los procesos organizativos en un equilibrio entre el trabajo funcional y el de proyectos (Midler, 1995).

Una cuestión importante es dónde y cuándo se producirá este punto de saturación de la proyectificación en las distintas empresas y, en consecuencia, en los sectores industriales.

La mayor proporción de trabajo por proyectos medida en estos estudios corresponde al sector sudafricano de la construcción, con un 64,4 %. Suponemos que la saturación en este sector, ya muy proyectificado, podría situarse en torno al 80 %. También los proveedores de servicios a empresas, como las consultorías, podrán automatizar la mayoría de sus procesos repetitivos, lo que dará lugar a un grado muy elevado de trabajo de proyecto restante. Lo mismo cabe decir de la industria manufacturera o del sector del petróleo y el gas. Parece que el nivel de saturación de proyectos ya es bastante alto en este sector. Aumentó un 11% entre 2010 y 2014 en Noruega y se espera que se mantenga estable en un 51%. La elevada cuota en este sector del petróleo y el gas se basa en la constante necesidad de exploración de nuevas fuentes de recursos que se lleva a cabo mediante proyectos.

El mayor aumento de proyectos en los últimos años se ha producido en el sector del comercio minorista, el transporte, la restauración, la hostelería y el turismo, con un incremento total del 50% en Noruega, partiendo de un bajo nivel del 9% en 2010. Otro gran aumento de la cuota de proyectos se produjo en el sector de la información y la comunicación. La cuota era del 35% y creció hasta el 51% en 2020 en Noruega.

Una diferencia importante entre los sectores alemán, islandés, noruego y sudafricano radica en la proporción de proyectos en agricultura, silvicultura y pesca. Definimos la hipótesis de que cuanto más relevante y elaborado es el sector industrial específico en un país, mayor es su cuota de trabajo en proyectos.

Por último, una diferencia importante entre las economías se encuentra en el sector público, la educación y la sanidad. Este sector experimentó un importante cambio organizativo al hacerse más ágil, digital y flexible, y la mayoría de los procesos de cambio organizativo se llevan a cabo mediante proyectos.

Winch et al. investigaron las implicaciones socioeconómicas de la pandemia de Covid-19 (2021). En todos los sectores, la organización de proyectos desem

peñó un papel central, incluida la identificación de fármacos terapéuticos para el tratamiento de la COVID-19; el desarrollo de sistemas de prueba y rastreo a gran escala para el control de infecciones; el diseño y la aplicación de planes de apoyo económico a particulares y empresas; la adquisición y distribución de equipos de protección personal a hospitales y residencias de ancianos; y la configuración y aplicación de planes de inoculación masiva para materializar los beneficios de los proyectos de desarrollo de vacunas. "En general, podemos identificar una "proyectificación" en la respuesta al COVID-19 que probablemente tenga ramificaciones mucho más amplias en la economía y la sociedad" (Winch et al., 2021:8).

En futuras investigaciones habrá que estudiar si se producirá una "saturación" de la proyectificación en las empresas, los sectores industriales y las economías, y en qué momento se producirá dicha saturación. Estas reflexiones han generado un nuevo vocabulario, como "sobre-proyectificación" (Lundin, 2015), "des-proyectificación" (Lundin, 2012) o "sociedad post-proyectificación" (Lundin, 2015).

5. CONCLUSIONES

Los indicadores económicos de la proporción de trabajo desarrollado por proyectos en las organizaciones abren un abanico de posibilidades para investigar cómo las mejores prácticas en la gestión de proyectos pueden incrementar la velocidad, la productividad, la eficacia y la competitividad de las empresas y las economías.

La proyectificación tiene grandes posibilidades y contiene aspectos ambivalentes para los individuos, las organizaciones, las sociedades, las instituciones sociales y para las naciones. El análisis muestra que podría haber varios ganadores de la proyectificación. Los ganadores podrían ser la proyectocracia, los ejecutivos de las organizaciones, las organizaciones a medida que ganan en flexibilidad y competitividad, las asociaciones de gestión de proyectos, el sector público, las sociedades y, por último, las economías nacionales, que adquieren un mayor grado de flexibilidad, capacidad de innovación y riqueza, factores competitivos importantes en la competencia mundial no sólo entre individuos y organizaciones, sino también entre economías nacionales. Los perdedores de la tendencia a la proyectificación podrían ser las personas que trabajan en condiciones laborales inestables (el proyectivariado) y los sistemas de bienestar social que se desmoronan por la creciente inestabilidad y falta de previsibilidad. Ambas caras de la medalla de la proyectificación deben conciliarse para lograr unas buenas condiciones para todas las partes interesadas en las futuras sociedades de proyecto.

Sugerimos una mayor influencia de las instituciones para dirigir y controlar esta transformación que tendrá un gran impacto en todos sus miembros, y una profunda formación de los individuos para que puedan evitar la explotación. Por último, nos gustaría señalar que la gestión de proyectos ha sido criticada como una práctica de gestión capitalista masculina. Por lo tanto, es tarea de las organizaciones

seguir desarrollando la disciplina para que se convierta en una práctica de gestión más orientada al ser humano y sostenible, que no se base en la explotación de los recursos humanos y naturales.

Los profesionales e investigadores de la gestión de proyectos de todo el mundo pueden argumentar con pruebas empíricas la importancia de su trabajo en relación con la investigación y la práctica de la gestión de proyectos. Los proyectos son una fuerza motriz para el desarrollo empresarial y para el desarrollo económico.

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CAPÍTULO 2

Proyectificación y la pyme

Juan Manuel Domínguez-Ortega

APGP

Resumen

Las pymes son la categoría empresarial más numerosa: suponen el 90% de la población de empresas, aportando un 70% de la generación de riqueza y de empleo. Los proyectos son actualmente un medio clave para el desarrollo social y económico. Esta realidad no es ajena a la pyme que, sin embargo, no ha tenido un gran vínculo con la gestión de proyectos, tradicionalmente centrada en las grandes empresas y con escasa adopción por parte de pymes. En este capítulo analizaremos las particularidades de la pyme, su relación con los proyectos y las características que influyen en su gestión. También revisaremos las limitaciones en la competitividad de las pymes y cómo aprovechar los proyectos como herramienta para competir en el contexto actual.

Palabras clave: Proyectificación; pyme; competitividad

1. Introducción

Este capítulo pretende abordar el impacto de la proyectificación en las pymes. El objetivo de cualquier organización es mantenerse competitiva para seguir con vida. Los proyectos representan una manera de organizar el trabajo que, en último término, persigue el mantenimiento y desarrollo de la capacidad de las pymes para competir.

Para ello, es necesario entender la relación de la pyme con los proyectos, sus características particulares, puntos fuertes y limitaciones. También su nivel de competitividad y sus retos de futuro.

Sólo desde esta perspectiva global seremos capaces de entender las implicaciones de la proyectificación para las pymes y las oportunidades y amenazas que plantea.

Antes de eso, resulta conveniente dedicar unas líneas a reflexionar sobre la naturaleza de los proyectos y su irrupción a nivel económico y social.

1.1. ¿Por qué las pymes llevan a cabo proyectos?

Este es un punto crítico para entender los planteamientos desde los que este capítulo ha sido escrito.

Las pymes, y cualquier tipo de organización, lanzan proyectos para algo en concreto. Ese algo se conoce como beneficio y tiene que ver con el impacto esperado del proyecto para la propia organización. Es decir, un proyecto es exitoso si consigue los resultados de impacto esperados. Esto es diferente de la tradicional medición de éxito de los proyectos, centrada en alcance, coste y plazo. Es necesario diferenciar el éxito del proyecto y el éxito de la gestión del proyecto.

A efectos prácticos, ¿es mejor sacar adelante un proyecto bien gestionado que no cumpla con sus objetivos o un proyecto desviado en su gestión pero que genere el beneficio previsto (o lo supere)? La Ópera de Sydney es un claro ejemplo de lo segundo.

Para ello, es necesario plantear objetivos estratégicos de la empresa (o del área de negocio implicada) y evaluar la aportación del proyecto a los mismos. La cuestión, que abordaremos en detalle más adelante, es que la organización y funcionamiento de las pymes tiende a ser más informal (más cuanto más pequeñas) y eso supone un reto para la definición de los impactos esperados. Es más difícil evaluar impactos cuando la hoja de ruta estratégica no está explicitada. Y esto no suele ser un punto fuerte en las pymes.

La buena noticia es que funciona. Que las decisiones sobre proyectos tengan un nivel de coherencia alto con la estrategia supone una mejora importante, de un 38% concretamente, en cuanto al cumplimiento de los objetivos en relación a un nivel de coherencia bajo (PMI, 2017).

1.2. ¿Por qué hay tantos proyectos?

Una de las explicaciones más gráficas del paso de las operaciones a los proyectos es la realizada por Antonio Nieto-Rodríguez en su artículo *The Project Economy has arrived* (Nieto-Rodríguez, 2021). Según el autor, venimos de un enfoque industrial, focalizado en los aspectos manufactureros, en el que primaba la productividad y la eficiencia. En un contexto razonablemente estable, con unos ciclos de planificación controlados (planes operativos anuales, con revisiones menores) y operaciones con un carácter permanente, todo esto podía funcionar. Sin embargo, el panorama actual se caracteriza por la ausencia de estabilidad, por el cambio frecuente.

Ante un contexto con alto grado de cambios, con avance del modelo de servicios frente al productivo, reducción de los ciclos de producto, impulso de la digitalización, entre otros factores, la capacidad de adaptación pasa a un primer plano, muy por delante de la eficiencia.

Ahí es donde entran en juego los proyectos. Los proyectos son la única manera de incorporar el cambio en las organizaciones. Los proyectos son esfuerzos

temporales, en contraposición a las operaciones. Sirven para adaptar. Para hacer evolucionar.

Así que no es extraño que los proyectos tengan cada vez más y más protagonismo en los modelos de negocio y formas de organizar las empresas, de cualquier tamaño. Mucho se ha avanzado desde la identificación realizada por Midler allá por 1995 en cuanto al impacto de los proyectos en la forma de funcionar y estructurarse de Renault.

2. Centrando el tiro: por qué tiene sentido explorar la relación entre la pyme y los proyectos

El creciente protagonismo de los proyectos en la sociedad y en el desarrollo económico es una realidad tan evidente que aquí estamos dedicando un libro a desentrañarla.

Este capítulo se centra en las pymes, por lo que conviene recordar los parámetros principales que se tienen en consideración para identificar a una empresa como pyme. Para ser incluida en una categoría, la empresa debe cumplir los dos requisitos mostrados en la tabla 1 (se ha excluido el parámetro ligado al volumen de activos en el balance).

Tabla 1: Parámetros para la consideración de pyme, según la Recomendación de la Comisión Europea 2003/361/EC

Tipología	Número de empleados	Ingresos anuales
Microempresa	<10 empleados	<2 millones €
Pequeña empresa	<50 empleados	<10 millones €
Mediana empresa	<250 empleados	<50 millones €

En el caso de Estados Unidos, habitualmente se consideran cifras superiores, aunque la determinación depende de la actividad (SBA, 2022). Por ejemplo, tradicionalmente el límite de empleados de una pyme ha sido de 500 personas, frente a las 250 en el caso europeo.

2.1. *El impacto económico de la pyme y sus proyectos*

La relevancia de las pymes, tanto a nivel de aportación al PIB como en empleos, es otro hecho irrefutable. Según el Foro Económico Mundial, suponen cerca del 90% de las empresas y casi el 70% en términos de aportación al PIB y generación de empleo. (WEF, 2022).

Así que, para tener claro el contexto, empecemos por estimar el impacto global del trabajo basado en proyectos realizado en las pequeñas y medianas empresas. Y para ello vamos a utilizar dos fuentes complementarias.

Empecemos con Yvonne-Gabrielle Schoper, autora del capítulo que presenta las relaciones entre la proyectificación y la economía en términos generales y una de las pioneras en la medición de la proyectificación, que en 2018 realizó la estimación de aportación económica de las actividades realizadas por proyectos en diferentes países (Schoper et al., 2018). A dicho estudio se han ido añadiendo otros, siguiendo el mismo enfoque (ver Tabla 2). A efectos orientativos, un promedio de los diferentes países, considerando el último valor disponible, situaría la aportación de la economía de proyectos en un valor medio del 40,6% del PIB. Si lo extrapolamos a la participación de la pyme en la economía global mencionada anteriormente, obtenemos un valor del 28,4% del PIB global generado mediante trabajo por proyectos en las pequeñas y medianas empresas.

Tabla 2: Estimación del nivel de proyectificación, como porcentaje de PIB en diferentes países

País	Autor	Año	%PIB
Alemania	Y.-G. Schoper et al., 2018	2019	41,3%
Islandia	Y.-G. Schoper et al., 2018	2019	31,5%
Noruega	Y.-G. Schoper et al., 2018	2019	33,8%
China	O. Lixiong et al., 2018	2022	53,0%
Sudáfrica	C. Marnevick, G. Bekker, 2022	2023	43,5%

Ahora, hagamos el análisis a partir de los resultados de trabajo por proyectos en la pyme. Rodney Turner (Turner et al, 2010), establece que aproximadamente un tercio de la actividad de las pymes se genera por proyectos. Si se aplica este valor a la aportación de las actividades basadas en proyectos en las pymes, es de 23,3% del PIB global.

Esta aproximación nos indicaría que los proyectos en las pymes vendrían a generar aproximadamente una cuarta parte del PIB global. Puesto en valor económico, las previsiones del Fondo Monetario Internacional para 2023 son 106,2 billones de dólares (FMI, 2023, precios corrientes). Según lo calculado, el trabajo por proyectos en las pymes supondría unos 26,5 billones de dólares. Para contextualizar, esta cifra se encuentra ligeramente por encima del PIB de Estados Unidos para el mismo año.

Por otro lado, la tendencia mostrada en la mayoría de fuentes mencionadas en materia de protagonismo de los proyectos es creciente, con tasas de entre el 1% y el 5% anual (O. Lixiong et al., 2018). Estos datos no recogen el impacto de la pandemia y el masivo lanzamiento de "transformaciones digitales".

La Economía de Proyectos ha llegado (Nieto-Rodríguez, 2021). Parece relevante, pues, que las pymes hablen con soltura el idioma de los proyectos.

2.2. *La tasa de éxito (fracaso) en los proyectos*

Los porcentajes habituales de éxito en los proyectos muestran una realidad clara: hay mucho margen de mejora en la gestión.

El Project Management Institute (PMI) realiza anualmente un estudio, denominado Pulso de la Profesión, en el que recoge los principales datos relacionados con los proyectos.

Así, según sus resultados para 2021, un 73% de los proyectos cumple con sus objetivos de negocio, lo que nos deja un preocupante 27% que no los cumple. Un 62% se acaba en plazo, es decir casi un 40% se retrasa. Y un 55% cumple con su presupuesto, lo que nos deja prácticamente la mitad de proyectos excedidos en costes. La tasa de proyectos fallidos (reconocidos) es de un 12%.

Estos resultados, con leves variaciones, se repiten sistemáticamente. Sería difícil imaginar que 3 de cada 10 autobuses no llegase a su destino, que 4 de cada 10 llegase tarde y que en 5 de cada 10 nos pidiesen dinero durante el trayecto para finalizarlo. Los motivos son variados, el propio Pulso de la Profesión hace una revisión detallada que no suele modificarse sustancialmente año tras año.

Para contextualizarlo al ámbito de la pyme, la comunidad autónoma de La Rioja, España, publica con carácter bienal un estudio del nivel de desarrollo de la gestión de proyectos. Los datos que ofrece sobre éxito de los proyectos arrojan un 75,2% en el cumplimiento de objetivos, un 73,8% en plazos y un 73,6% en presupuesto (Gobierno de La Rioja, 2023).

Como contrapunto, Bent Flyvbjerg, autor especializado en grandes proyectos, ha acuñado la "ley de hierro de la gestión de proyectos": *excedidos en coste, excedidos en plazo, no cumpliendo los beneficios previstos, una y otra vez* (Flyvbjerg, Gardner, 2023). Según el autor, casi la mitad de los proyectos no cumple en costes, sólo un 8,5% de los proyectos cumple en costes y plazo y un pírrico 0,5% genera, además, los beneficios previstos. Es cierto que Flyvbjerg se focaliza en grandes proyectos de infraestructuras, pero llama la atención que en un contexto tan proyectizado, los resultados sean tan preocupantes.

Otro ejemplo, vinculado a los esfuerzos de transformación digital tras la pandemia, cita que el promedio de iniciativas fracasadas alcanza el 87,5% (Bonnet, 2022).

Los proyectos fallan sistemáticamente, conocemos las causas y, pese a ello, siguen fallando, ¿por qué? Es lo que se conoce como paradoja de Cobb.

2.3. *Lo necesario para sacar adelante los proyectos*

De lo anterior puede deducirse que, por lo general, no sabemos sacar adelante los proyectos. Y esto tiene mucho que ver con la capacitación.

Como he mencionado en la introducción, los proyectos han de cumplir unas expectativas de impacto y se espera que la gestión de los mismos también sea exitosa y se ajuste a la planificación realizada.

Esto implica una dualidad en cuanto a las competencias necesarias para sacarlos adelante. Por un lado, se encuentran aquellas vinculadas a la fase más estratégica, conceptualización y evaluación de proyectos, que permitirán seleccionar los más convenientes. Por otro están las relacionadas con su planificación y ejecución.

En artículo vinculado con esa dualidad (Leinward & Rotering, 2017) se mostraban los resultados de una encuesta realizada a directivos que les planteaba sus niveles de efectividad en el desarrollo de estrategias y en la ejecución de las mismas. El estudio mostraba cómo un 8% de las personas encuestadas se definían como muy efectivas en ambas facetas, un 23% como efectivas en ambas y un 35% no alcanzaban la efectividad en ninguno de los dos ámbitos. Por facetas, un 48% de las personas encuestadas no alcanzaba la efectividad en el desarrollo de estrategias y un 50% en su ejecución.

Esa encuesta estaba realizada en ámbito corporativo, que dispone de niveles de especialización muy superiores a la pyme, donde tienen más relevancia los perfiles generalistas. Por ello, probablemente nos encontremos que los resultados en la pequeña y mediana empresa fuesen sensiblemente inferiores.

Existen diferentes fuentes que relacionan el desarrollo de determinadas habilidades con un mejor desempeño de los proyectos. Por ejemplo, siguiendo con el Pulso de la Profesión, en su edición de 2023 recogía diferencias relevantes entre las organizaciones según su nivel de desarrollo de lo que denominan *power skills* (que podrían traducirse como habilidades interpersonales) y su influencia en aspectos ligados a los proyectos. Así, un nivel alto de priorización en las *power skills*, se relaciona con una mejora sensible tanto en la tasa de proyectos que cumplen los objetivos de negocio y con una significativa mejoría en cuanto al presupuesto perdido debido a proyectos fallidos. A nivel general, también se las relaciona con una mayor madurez en la realización de beneficios, en la gestión de proyectos y en agilidad organizacional.

Y en el caso de la pyme, ¿qué podemos decir? Pues que el desarrollo de capacidades requiere tiempo y recursos, que suelen ser la principal barrera para el avance de las pequeñas y medianas empresas. Más adelante abordaremos este aspecto concreto que, bajo mi punto de vista, es el elemento clave que condicionará el potencial de la pyme para surfear la ola de la proyectificación.

3. La pyme y sus proyectos

A continuación, trataremos de desgranar la relación entre las pymes, sus proyectos y la gestión que realiza de los mismos.

Lo cierto es que en las publicaciones sobre proyectos y gestión de proyectos, las pymes han recibido una atención bastante escasa, con algunas excepciones como las aportaciones de Rodney Turner, entre otros.

3.1. *La gestión de proyectos tradicional*

Los conocimientos en materia de gestión de proyectos se han vinculado a disciplinas del ámbito técnico y tuvieron su despegue a partir de la segunda mitad del siglo XX.

Tanto por su origen como por sus ámbitos de aplicación, las metodologías de gestión de proyectos han ido ganando en profundidad, requiriendo unos crecientes niveles de especialización para su aplicación. Quizás este sea el motivo principal por el que la gestión de proyectos se ha mantenido tradicionalmente alejada de la gestión general de la empresa: sólo los especialistas eran capaces de entenderla. Como menciona habitualmente Antonio Nieto-Rodríguez, las herramientas en la gestión de empresas suelen ser sencillas (las 4P del marketing de McCarthy, las 5 fuerzas de Porter…), ¿cómo pretendemos que la gestión de proyectos se generalice si las herramientas son tan complejas?

Esta evolución en los enfoques y metodologías los ha alejado de las pymes, que tienen necesidades ciertamente diferentes. Vamos a empezar con una caracterización global de la pyme en relación a las grandes empresas y su nivel de encaje con la gestión de proyectos tradicional (véase tabla 3).

Tabla 3: Caracterización de las pymes y la gestión de proyectos tradicional. Adaptado de Ghobadian y Gallear (1997), Turner et al (2009)

Ámbito	**Las pymes frente a las grandes empresas**	**La gestión de proyectos tradicional**
Procesos	Requieren sistemas de planificación y control sencillos, con una rendición de cuentas informal.	Los procesos son formales y a menudo burocráticos
Procedimientos	Tienen un menor grado de estandarización, con una toma de decisiones más idealista.	Fomenta la especialización y una toma de decisiones formal
Estructura	Tienen un menor grado de especialización, con multitarea, pero con un alto grado de capacidad de innovación.	Roles bien definidos, limita la innovación (Keegan, Turner, 2002)
Personas	Debido a las altas consecuencias de los fallos, las personas prefieren técnicas ya testadas	Focalizada en el sistema más que en las personas

La tabla 3 muestra la concordancia entre los enfoques tradicionales de gestión de proyectos y las características de las grandes empresas. Y también la falta de concordancia con la realidad de las pymes, que redunda en su limitada aplicación. Las pymes requieren enfoques de gestión de proyectos que se acerquen a sus necesidades.

3.2. *El impacto del tamaño en la gestión de las pymes y de sus proyectos*

En el apartado anterior comparábamos las pymes con la gran empresa. Pero la definición de pyme abarca realidades muy diferentes. Así, el funcionamiento de una empresa de 8 trabajadores tendrá poco que ver con el de una empresa de 224 empleados.

La literatura relativa a pymes se ha encargado de identificar patrones de evolución de las empresas. Una referencia habitual es Lewis y Churchill (1983), quienes identifican cinco etapas de crecimiento de las empresas y caracterizan cada una de ellas (tabla 4)

Tabla 4: Etapas en la evolución de las empresas. Elaboración propia a partir de Lewis y Churchill (1983)

Etapa	Estilo de gestión	Preocupaciones principales
Existencia	Supervisión directa	Obtener clientes y entregar los productos/servicios
Supervivencia	Supervisión supervisada	Generar ingresos suficientes para obtener un retorno económico
Éxito	Funcional	Decidir si optar por el crecimiento o por la estabilidad y rentabilidad
Despegue	Divisional	Cómo crecer rápidamente y cómo financiar ese crecimiento
Madurez de recursos	Línea y personal	Consolidar las ganancias derivadas del rápido crecimiento y mantener las ventajas del tamaño pequeño

Lo fundamental es constatar que, aunque todas sean pymes, los retos en cada momento son diferentes, como también lo son las estructuras y necesidades (véase la tabla 5). Y esto tiene su influencia sobre su gestión de proyectos.

Tabla 5: Estructura organizativa, por tamaños. Elaboración propia a partir de Turner et al (2010)

Tamaño	Unidades de negocio	Niveles de gestión	Naturaleza del trabajo y de los procedimientos
Microempresa	Una	Uno	Multitarea / enfocados en las personas
Pequeña	Varias	Dos	Multitarea / enfocados en las personas
Mediana	Varias	Tres	Especialistas / formales

Así, si tomamos el tamaño como hilo conductor, cuanto más pequeña es la empresa, su funcionamiento se basa más en procesos informales y flexibilidad, con predominio de los perfiles generalistas. Esta es la realidad de las microempresas y también de las pequeñas empresas. Las empresas medianas, sin embargo, ya requieren un nivel de formalización más evidente y cuentan habitualmente con especialistas, que le permiten sacar partido de una mayor sistematización en la gestión de proyectos.

Y estos aspectos son dinámicos, se presentan momentos de transición, más o menos dramáticos. En su investigación, Turner (2010) detectó una crisis hacia los 15-20 empleados, caracterizada por la creación de diferentes áreas de negocio. A los 40-50 empleados se produce otra transición, por la incorporación de niveles intermedios de dirección, coincidente con el paso de pequeña a mediana empresa. ¿Podemos pretender que estos cambios a nivel organizacional no afecten a la gestión de los proyectos en las empresas?

Así, los enfoques y herramientas de gestión de proyectos han de considerar estos aspectos. Las herramientas empleadas para las grandes empresas pueden adaptarse para su empleo en las empresas de tamaño mediano, que también tienen cierto grado de formalización y especialización. Pero es necesaria una vuelta de tuerca más para adaptarlas a las pequeñas empresas y a las microempresas. Turner definió estos enfoques como *lite* para medianas empresas y *micro-lite* para pequeñas y microempresas (Turner et al. 2012).

3.3. *Los proyectos en las pymes*

Las pymes suelen emplear sus proyectos como parte de su oferta a otras empresas, en forma final de productos o servicios. También los aplican internamente, para su propio crecimiento e innovación.

Según lo mencionado, parece lógico pensar que las características de la pyme influirán de alguna manera sobre los proyectos que desarrolla. La literatura apunta a que sí. Existe una relación entre el tamaño de la pyme y el tamaño medio de sus proyectos, expresado en duración de los mismos. Así, la duración más habitual en las microempresas es de 0 a 3 meses, en las pequeñas de 3 a 6 meses y en las medianas de 6 a 12 meses (Turner, 2010).

De forma general, cuanto más pequeña es la empresa, más pequeños los proyectos que desarrolla. Y proyectos más pequeños implican menores necesidades para su gestión. Por otro lado, hemos mencionado que cuanto más pequeña es la empresa, mayor nivel de flexibilidad en los procedimientos.

Todo esto vuelve a incidir en que la forma de gestionar los proyectos ha de adaptarse a la realidad de la pyme. La gestión de proyectos, como cualquier tarea, es una actividad que consume recursos. Entre un 10% y un 30% del total del proyecto, según Turner (2012). En función de la demanda del proyecto, existirá

un punto que optimice la eficiencia del resultado. Esto es, la carga aplicada a la gestión de un proyecto ha de ser apropiada a la tipología del reto.

Resumiendo, para obtener un resultado eficiente, cuanto menor tamaño tiene la empresa, menor esfuerzo necesita. Dicho de otra manera, pequeños esfuerzos en materia de gestión de proyectos pueden reportar grandes resultados en empresas de menor tamaño.

Esto es una buena noticia. Las empresas de menor tamaño suelen disponer de menor cantidad de recursos para su desarrollo. Si los requisitos de desarrollo de capacidades son menores, las limitaciones por carencia de recursos serán menos relevantes.

Y tiene otra interpretación: más no siempre es mejor. Mayores niveles de madurez en gestión de proyectos, entendidos como una mayor sistematización de las prácticas de gestión de proyectos, pueden tener un impacto negativo en la eficiencia si la complejidad de los proyectos no lo justifica.

Este punto es de especial relevancia, habida cuenta de la relación mencionada entre las capacidades y el resultado de los proyectos. Para sacar adelante los proyectos no planteamos niveles absolutos, sino relativos a la complejidad de los mismos. Y proyectos más pequeños conllevan menores niveles de complejidad. Hablamos de capacidades suficientes para sacar adelante ciertas tipologías de proyectos, no de niveles que permitan lidiar con cualquier proyecto.

3.4. *Una aplicación práctica: el nivel de desarrollo de la gestión de proyectos en las organizaciones de La Rioja*

Para respaldar los mensajes hasta ahora recogidos se emplearán los resultados obtenidos el estudio que evalúa las prácticas de gestión de proyectos en las organizaciones de la Comunidad Autónoma de La Rioja (Gobierno de La Rioja, 2023).

El informe, que tiene como objetivo el seguimiento periódico de los niveles de desarrollo de la gestión de proyectos en organizaciones de la comunidad autónoma de La Rioja, recopila los resultados de los proyectos y una serie de parámetros que permiten definir un índice global de desarrollo (IGD), mediante la encuesta de 379 entidades.

Los resultados se desglosan en función de diferentes parámetros, entre ellos, el tamaño de la organización, en el cual nos centraremos a continuación.

Resultados de los proyectos

En primer lugar, se evalúan los resultados de éxito de los proyectos relativos a los tres aspectos principales (objetivos del proyecto, plazos y presupuesto). La encuesta está diseñada con respuestas en una escala Likert de cinco opciones. La agrupación por tamaño incluye organizaciones de los ámbitos privado y público (tabla 6).

*Tabla 6: Resultados de los proyectos, según tamaño de la organización
(Gobierno de La Rioja, 2023) y PMI (2021)*

Parámetro	1-9 personas	10-49 personas	50 y más personas	PMI, 2021
Objetivos	73,3%	74,1%	79,7%	73,0%
Plazos	73,1%	73,0%	76,0%	62,0%
Presupuesto	73,1%	72,5%	76,0%	55,0%

A efectos comparativos, los resultados obtenidos muestran unos niveles de éxito ligeramente superiores a los indicados por el PMI en materia de cumplimiento de objetivos. En el caso del plazo y el presupuesto, se observa una diferencia más evidente. Es relevante indicar, no obstante, la importante diferencia entre tamaños de empresas y tipologías de proyectos que componen una muestra y otra.

Centrándonos en el ámbito riojano, se observa que los tamaños mayores se vinculan con mejores resultados. Sin embargo, a efectos de plazos y presupuestos, no hay grandes diferencias en los tamaños más pequeños.

Resultados del nivel de desarrollo de la gestión de proyectos

Para evaluar el nivel de desarrollo en materia de gestión de proyectos se construyó un índice que integra tres dimensiones, cada una de ellas con un conjunto de factores. Las dimensiones se detallan en la tabla 7.

*Tabla 7: Evaluación del nivel de desarrollo de la gestión de proyectos
(Gobierno de La Rioja, 2023)*

Dimensión	Indicadores
Capacidades (C): percepción de los encuestados sobre su capacidad para la gestión de proyectos	• C1. Gestión de proyectos. • C2. Capacidades de la organización.
Actitud: la actitud dentro de la organización hacia la gestión de proyectos	• A1. Actitud hacia la gestión de proyectos. • A2. Actitud hacia el fomento por parte de las administraciones.
Implementación: la implantación real de la gestión de proyectos en su organización	• I1. Uso de metodologías. • I2. Formación. • I3. Estructura organizativa. • I4. Certificaciones.

La valoración de cada indicador (escala Likert 1-5) y de las dimensiones se muestra en la tabla 8.

Tabla 8: Resultados de las valoraciones de los indicadores del nivel de desarrollo de la gestión de proyectos (Gobierno de La Rioja, 2023)

Indicadores	1-9 personas	10-49 personas	50 y más personas
C1. Gestión de proyectos en la organización	2,34	2,43	3,22
C2. Capacidades de la organización	3,72	3,83	4,18
A1. Actitud hacia la gestión de proyectos	3,98	3,98	4,39
A2. Actitud hacia el fomento por parte de la administración	3,84	3,88	4,28
I1. Uso de metodologías	2,93	2,87	3,58
I2. Formación	1,47	1,65	2,37
I3. Estructura organizativa	1,49	1,70	2,61
I4. Certificaciones	1,09	1,12	1,32

A partir de estos valores, se calculan los resultados por dimensiones y el valor del índice global de desarrollo (IGD) manteniéndose los tamaños de empresa en su presentación (tabla)). La metodología de cálculo puede encontrarse en el informe de referencia.

Tabla 9: Resultados del nivel de desarrollo de la gestión de proyectos (Gobierno de La Rioja, 2023)

Dimensiones	1-9 personas	10-49 personas	50 y más personas
C. Capacidades percibidas	3,03	3,13	3,70
A. Actitud	3,91	3,93	4,33
I. Implementación	1,74	1,84	2,47
IGD. Índice Global de Desarrollo	2,55	2,62	3,18

Los resultados obtenidos muestran un valor más elevado en los niveles de madurez de las organizaciones de mayor tamaño para las tres dimensiones estudiadas. Dichos resultados muestran una importante proximidad entre los niveles de menor

tamaño (1 a 9 personas y 10 a 49 personas), mientras que los resultados para las organizaciones a partir de 50 personas presentan valores más altos. Así, el resultado global de las empresas de mayor tamaño es sensiblemente superior.

Por dimensiones, la Actitud es el ámbito que mayor valoración recibe en todos los casos. Así, independientemente del tamaño, las entidades encuestadas muestras una alta predisposición hacia el impacto que la gestión de proyectos aporta a sus organizaciones.

Le siguen las Capacidades percibidas, con valoraciones algo inferiores pero un comportamiento similar.

Por último, la dimensión de Implementación muestra los menores valores pero el mismo patrón de respuestas. Esta sección, más vinculada con la formalización de las prácticas de gestión y con la aplicación de recursos, muestra unas diferencias más acusadas con respecto a las organizaciones de mayor tamaño.

Comentarios

Estos datos muestran que existen resultados similares entre organizaciones de tamaño micro y pequeño (73,3% y 74,1% en cumplimiento de objetivos) que se relaciona con sus resultados en cuanto a su nivel de capacidad de gestión de proyectos, identificado por el IGD (2,55 y 2,62, respectivamente). Esto, en la línea indicada por Turner, muestra la cercanía en necesidades y tipología de proyectos desempeñados por las organizaciones de tamaño micro y pequeño.

Para organizaciones de mayor tamaño, unos niveles de éxito algo superiores (79,7% en objetivos) están relacionados con unas capacidades sensiblemente superiores, con un IGD de 3,18. De la misma forma, estos resultados parecen respaldar las afirmaciones anteriores, que defienden el encaje entre la demanda de los proyectos y el esfuerzo requerido para una gestión apropiada de los mismos.

Si seguimos los planteamientos realizados, habría un punto óptimo de capacidades para los distintos niveles de organización. Eso lleva a plantearse la relación entre capacidades y resultados y evaluar el esfuerzo a realizar para mejorar los resultados con una aplicación eficiente de recursos.

4. La capacidad de competir de las pymes

La creciente proyectificación ha de implicar cambios en el funcionamiento de las pymes, que han de adaptar su estructura, herramientas y procesos para dar respuesta a los nuevos retos.

Es importante mirar al pasado, presente y futuro para entender los retos de la pyme. Especialmente al futuro, porque habrá que integrar las formas de funcionar con los nuevos retos. De eso trata este apartado, de ofrecer unas pinceladas sobre la competitividad de las pymes y los retos que se le plantean.

4.1. *¿Qué tal compiten las pymes?*

Lo cierto es que la trayectoria reciente no es halagüeña. La realidad es que las pymes tienen que competir en un entorno complejo. Y necesitan hacerlo mejor.

Los datos europeos muestran que las pymes están perdiendo de forma continuada competitividad en relación a la gran empresa. En este sentido se manifiesta el informe de 2022 de la Corte Europea de Auditores (Unión Europea, 2022). Dicho informe sostiene que en el periodo 2011-2018 las pymes de la Unión Europea tuvieron una peor evolución que las grandes empresas en los principales indicadores. En particular:

- El incremento de ingresos en las grandes empresas fue 8 veces superior para las grandes empresas (34,7% versus 4,4%), impactando en la cuota de mercado de las pymes.
- El incremento en empleados de las grandes empresas fue 5 veces superior (24,0% versus 5,0%), reduciendo el peso de las pymes en el mercado laboral europeo.
- El incremento de valor añadido de las grandes empresas fue 3 veces superior (44,0% versus 14,3%), minorando el peso de las pymes en el desarrollo de riqueza.

Estos datos pre-COVID no incorporan el desigual impacto que tuvo la pandemia sobre las pymes, con mucho menos margen de maniobra para resistir y que resultaron afectadas de una manera más severa que las grandes empresas.

4.2. *Principios para competir*

En la introducción mencionábamos que los proyectos se hacen para algo, para generar un beneficio para la organización alineado con la estrategia. Si las pymes van a tener que incorporarlos de manera creciente, tendrán que evaluar las implicaciones sobre los principales aspectos que pueden condicionar su competitividad.

En primer lugar, desde un punto de vista externo, el contexto global con el que tienen que lidiar las pymes está caracterizado por una serie de tendencias. A partir del informe de la Organización Mundial del Trabajo (ILO, 2021), se pueden destacar las siguientes.

- Cambios en la actividad económica: el crecimiento económico se desplaza a los mercados emergentes, lo que propiciará la atención de las grandes compañías que irán trasladando sus centros de decisión a estos países. Además, se producirá una concentración de población en las ciudades.
- Cambios tecnológicos: no es novedad que la tecnología ejerza de elemento disruptor, pero su integración en la vida diaria y la velocidad de su evolución lo convierten en una fuerza aceleradora por su alcance, escala e impacto.

- Cambios demográficos: el envejecimiento de la población es una realidad en los países desarrollados que también se expande a China y América Latina, afectando al reemplazo generacional a nivel global. El rol y la influencia de las diferentes generaciones será variable en los diferentes países.
- Globalización: el comercio, movimiento de capitales y personas, información ha propiciado una mayor conectividad mundial. Los mercados evolucionan y harán de Asia el principal centro de comercio, con China e India a la cabeza. Asimismo, se puede observar el auge del nacionalismo y populismo en algunos territorios.
- Impactos ambientales: tras una fase lineal de calentamiento, estamos entrando en una nueva etapa de impactos climáticos exponenciales. Los aspectos climáticos estarán en la base de algunas de los principales económicos y sociales.

En su informe *Future Readiness of SMEs*, (World Economic Forum, 2022) el Foro Económico Mundial recoge cinco principios de actuación para impulsar la competitividad de las pymes, que se resumen a continuación.

- Ejecución de la visión: una visión clara, poderosa y transmitida a toda la organización, que se traduzca en acciones concretas y medibles.
- Las personas como activo: el talento como activo estratégico, desarrollando el atractivo para competir por el mismo con sus propias armas (una visión atractiva, autonomía, capacidades de desarrollo…).
- La tecnología como acelerador: la tecnología es un medio para alcanzar un fin, cuando se tiene la visión apropiada, la pyme puede ayudarse de la tecnología para alcanzarla.
- Importancia de los ecosistemas: redes locales y globales diversas, complementarias y activas permiten acceder a recursos cuando son necesarios, potenciando las capacidades de las pymes. Por su tamaño y recursos, la pyme es mucho más dependiente de las redes de colaboración que las grandes empresas.
- Crecimiento estratégico: el crecimiento se elige, en función de los objetivos de la empresa y de la evolución del contexto. Es necesario decidir cómo usar los recursos y medios a su alcance para mantenerse competitivos.

5. Conclusiones

Espero que a estas alturas haya quedado clara la importancia de que las pymes se tomen en serio la gestión de sus proyectos.

El dudoso encaje entre los enfoques tradicionales de gestión de proyectos, más apropiados para las grandes empresas, y las necesidades de la pyme no lo ha puesto fácil. Pero hay que dejar algo claro: la que sale perdiendo en esta situación es la pyme. Las pymes necesitan llevar adelante con éxito los proyectos.

Y esto implica tomar conciencia y hacerse responsable. Hacerse responsable de cuatro ámbitos, que no puede dejar atrás si quiere competir.

Hay un aspecto positivo en el territorio de las empresas más pequeñas, un esfuerzo pequeño conlleva unos grandes resultados.

5.1. *Criterio estratégico*

La pyme tiene que decidir cómo quiere competir y definir su camino.

Las decisiones que tome condicionarán su forma de estructurarse y de afrontar lo que venga. También determinarán su atractivo para atraer a las personas que permitan recorrer el camino. Los proyectos son una herramienta que servirá para sacar adelante las decisiones basadas en el propósito y la voluntad de la compañía.

La claridad de ideas de las personas que lideran no siempre llega al resto de la empresa. Muchas veces los *por qué* solo son evidentes para las personas más veteranas. La flexibilidad conduce en muchos casos al mundo de lo implícito, cuando la mejor herramienta es la comunicación explícita, especialmente de propósitos y valores. Explicitar una estrategia, que permita poner en común objetivos y criterios, valores y aspiraciones, es una manera perfecta de alinear comportamientos y personas.

De nuevo, hablamos de una dedicación suficiente, útil para guiar e inspirar. Hablamos de dedicar atención suficiente, de ser solventes.

5.2. *Criterio de proyectos*

La pyme debe tener criterio en gestión de proyectos y escoger su enfoque particular. Esta responsabilidad es exclusiva de la pyme.

No hay excusas. En una Economía de Proyectos, el futuro de cada pyme pasa por el éxito de sus proyectos. La gestión de proyectos no es cosa de las grandes empresas. Tampoco está limitada a un ámbito concreto. Es transversal. Aplica a todo y a todos. La pyme debe desarrollar criterio propio para seleccionar sus enfoques de gestión de proyectos de manera consciente. Eso implica un planteamiento claro de cómo quiere competir (criterio estratégico) y de cómo los proyectos le ayudan.

Por otro lado, existen herramientas y metodologías adaptadas a la pyme, aunque queda camino por delante.

Una de las principales demandas es la limitación de herramientas dirigidas a la pyme. Hoy en día hay herramientas para la pyme. El mercado de las herramientas y enfoques en la gestión de proyectos es muy dinámico y se han ido generando alternativas que pueden adaptarse a las necesidades de la pyme. Iniciativas como PM² (Comisión Europea, sf) desarrollado por la Comisión Europea, y desde 2018 de acceso abierto y con guías y documentación en múltiples idiomas, potencia el acceso a la gestión de proyectos y el establecimiento de un lenguaje común a nivel europeo.

Más recientemente, otras iniciativas, como *p3.express*, van más allá en la simplificación de la carga administrativa y puede ser especialmente útil para proyectos con baja complejidad.

5.3. *Criterio humano*

Los proyectos los sacan adelante las personas. Y las pymes, especialmente las más pequeñas, tienen un enfoque en personas.

El enfoque en las personas, junto con unos planteamientos atractivos a nivel de estrategia de empresa, incluso con el arraigo a un territorio, pueden permitir mantenerse competitiva en la lucha por el talento de unas generaciones con aspiraciones vitales muy diferentes a las precedentes. El mercado laboral evoluciona y, de nuevo, la pyme ha de competir.

Por otro lado, hay que recordar que las microempresas y pequeñas empresas se basan principalmente en perfiles generalistas, que no necesariamente disponen de formación en materia de gestión de proyectos. La versatilidad y actividad multitarea no deben suponer un perjuicio al éxito de los proyectos. Si los proyectos son la herramienta para competir, no puede hacerse desde una perspectiva *amateur*. Es necesario unos niveles suficientes de capacitación, ya que unas capacidades apropiadas tienen un impacto positivo en los resultados de los proyectos.

La limitación de recursos no debería suponer hoy en día un problema insalvable. Es verdad que en el pasado, el acceso a formación era algo más complejo. A día de hoy, existe una multitud de medios útiles de formación en proyectos y muchos de ellos gratuitos. Incluso las iniciativas de grandes empresas como Microsoft o Google, con itinerarios formativos gratuitos online en gestión de proyectos, pueden ser de utilidad.

En una Economía de Proyectos, no parece razonable limitar el futuro de la empresa. De nuevo, es responsabilidad de la pyme contar con personas capacitadas.

5.4. *Criterio tecnológico*

La tecnología es clave para competir. Y lo será aún más. Y la gestión de proyectos no queda fuera de esta influencia.

El auge reciente de ChatGPT como una más de las aplicaciones de la inteligencia artificial no hace sino poner el acento en el impacto que la tecnología. La capacidad de disrupción en áreas concretas, como la automatización del seguimiento y la generación de informes, será una constante que impactará en aspectos como la eficiencia.

La capacidad de integración de los avances tecnológicos en la pyme va a tener una importancia capital en su capacidad de competir. Este punto requiere un esfuerzo extra, habida cuenta de la menor presencia de perfiles especializados. Es necesario que la pyme sea consciente y encuentre las fuentes de información y los

socios adecuados para no quedarse atrás. El criterio tecnológico ha de sumarse al resto de criterios, no es negociable.

Criterio estratégico, criterio de proyectos, criterio humano y criterio tecnológico. Esas son, bajo mi punto de vista, las cuatro bases que darán soporte al futuro de la pyme en la Economía de Proyectos.

Es una buena noticia que los proyectos trasciendan el ámbito técnico y se reconozcan en el ámbito negocio. Prueba de ello es el artículo "Tus proyectos son tu futuro", publicado en *Harvard Business Review* (Ignatius, 2021).

Pues eso, dirigido a las pymes, *tus proyectos son tu futuro*.

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Proyectificación y cooperación para el desarrollo

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Resumen

La Cooperación para el Desarrollo es un esfuerzo global que tiene como objetivo mejorar las condiciones de vida de la población mundial. Los proyectos desempeñan un papel significativo en este esfuerzo, con un conjunto de objetivos internacionalmente aceptados, los Objetivos de Desarrollo Sostenible, y elementos suficientes para medir el progreso en Desarrollo Humano. Más del cincuenta por ciento de la inversión mundial en Asistencia Oficial al Desarrollo se implementa en forma de Proyectos, en un esfuerzo conjunto en el que participan e interactúan a todos los niveles desde agencias internacionales hasta organizaciones de base. Los proyectos de Cooperación para el Desarrollo se llevan a cabo en diferentes países, comparten características comunes y están logrando su propósito de forma efectiva. La Gestión de Proyectos en Cooperación para el Desarrollo hace un uso extensivo del Enfoque del Marco Lógico como herramienta fundamental y casi universal para diseñar, planificar, monitorear y evaluar proyectos. Sin embargo, no está exenta de limitaciones y un enfoque profesionalizado de Gestión de Proyectos podría contribuir a resolver algunos de los desafíos que enfrentan los directores de proyectos en este ámbito. Este capítulo discute estos elementos y ofrece una propuesta de mejorar para la gestión de proyectos y seguir construyendo un mundo mejor.

Keywords: Gestión de Proyectos, Cooperación para el Desarrollo, Proyectificación.

1. Introducción

En general, se reconoce que la Cooperación para el Desarrollo dio comienzo hacia el final de la Segunda Guerra Mundial. En 1944, la Conferencia Breton-Woods sentó las bases de las instituciones del Fondo Monetario Internacional

(FMI) y el Banco Mundial (BM) e inauguró la era de la Cooperación para el Desarrollo (Kragelund, 2017). En 1945, la comunidad internacional dio a luz al sistema de las Naciones Unidas (ONU) que trabaja para mantener la paz y la seguridad internacionales, proteger los derechos humanos, entregar ayuda humanitaria, promover el desarrollo sostenible y defender el derecho internacional. Estas instituciones, junto con la Organización para la Cooperación y el Desarrollo Económico (OCDE), fundada en 1961, son la columna vertebral del sistema multilateral que proporciona el marco global de la Cooperación para el Desarrollo. La adopción en 2000 de los Objetivos de Desarrollo del Milenio (ONU, 2000) fue el primer paso que condujo en 2015 a la más ambiciosa Agenda 2030 para el Desarrollo Sostenible (ONU, 2015). Esta agenda marcó un hito clave al definir el conjunto globalmente aceptado de 17 Objetivos de Desarrollo Sostenible (ODS) que actualmente definen el alcance y la rendición de cuentas de la Cooperación para el Desarrollo (Fukuda-Parr y McNeill, 2019).

Sin embargo, han pasado más de 75 años y todavía no es fácil encontrar una definición estandarizada para la Cooperación para el Desarrollo. De hecho, se pueden encontrar muchas definiciones diferentes en la literatura académica (Chaturvedi et al., 2021) que manifiestan la complejidad del concepto y el sistema asociado. Incluso sin una definición clara, podemos decir que la Cooperación para el Desarrollo es un esfuerzo que involucra a múltiples actores en actividades entre países, buscando la mejora del nivel de vida de la población mundial, a través de numerosos tipos y modalidades de ayuda.

Lo que no se discute es que la Cooperación para el Desarrollo es una actividad global que moviliza grandes cantidades de fondos y esfuerzos. Se ha estimado que *"en los últimos 60 años, los países de altos ingresos han invertido más de 4000 billones de euros en ayuda al desarrollo"* (Develtere et al., 2021). Medida en USD constantes de 2020, la Ayuda Oficial al Desarrollo (AOD) se ha más que cuadruplicado en el período 1960-2020, lo que hace que la Cooperación para el Desarrollo sea una actividad en crecimiento. En 2021, la AOD alcanzó los 178.9 billones de dólares por parte de los 38 países que son miembros del Comité de Ayuda al Desarrollo (CAD), lo que representa el 0,33% de su ingreso nacional bruto (INB) combinado (OCDE, 2021). Esta cifra todavía está lejos del objetivo del 0,7% de AOD / INB acordado el 24 de octubre de 1970 en Resolución de las Naciones Unidas (OCDE, 2016).

La Cooperación para el Desarrollo ha evolucionado mucho a lo largo de las décadas (Janus et al., 2015) debido a numerosos factores, sujetos a las cambiantes condiciones geopolíticas (Ayllón, 2007). Pero desde el principio, la Cooperación para el Desarrollo ha utilizado ampliamente el enfoque de proyectos para poner en marcha sus acciones. Este capítulo discutirá el papel de los proyectos en la Cooperación al Desarrollo, su importancia y la forma en que se gestionan para contribuir a mejorar el mundo.

2. EL PAPEL DE LOS PROYECTOS EN LA COOPERACIÓN PARA EL DESARROLLO

La humanidad ha trabajado por proyectos a lo largo de toda su historia, desde Stonehenge hasta la conquista del espacio. Es en la segunda mitad del siglo XX cuando los proyectos han comenzado a gestionarse aplicando herramientas y técnicas sistemáticas (Seymour & Hussein, 2014). El sistema de Cooperación para el Desarrollo surgió casi al mismo tiempo en que la gestión de proyectos comenzó a considerarse un campo profesional en sí mismo. Los proyectos han sido un instrumento fundamental de la Cooperación para el Desarrollo desde el principio y se puede considerar que los proyectos de Cooperación al Desarrollo forman parte de la "condición humana" que define la actual "sociedad de proyectos" (Jensen et al., 2016).

2.1. *Definiendo Cooperación para el Desarrollo*

La fuente oficial de datos sobre cifras globales en Cooperación para el Desarrollo es el CAD de la OCDE, que recopila datos anuales, con la información proporcionada por sus miembros, en su base de datos de Actividad de la Ayuda del Sistema de Notificación por parte de los Países Acreedores (SNPA/CRS). Existen directrices, reglas y principios estrictos sobre cómo se informa sobre la AOD. Estos incluyen definiciones acordadas para los canales de ayuda, el tipo de ayuda, el propósito, los objetivos políticos y la vinculación de la ayuda.

No todo es contabilizado por el CAD como AOD, ya que, por ejemplo, la ayuda militar y las actividades para la promoción de los intereses de seguridad de los donantes no se consideran AOD (Price, 2019). Hay ciertas formas de asistencia, como la asistencia humanitaria, la ayuda alimentaria o la asistencia de los donantes a los refugiados, que tienen su propia manera de ser contabilizadas. Esto se debe al contexto muy específico en el que se prestan estos tipos de ayuda, lo que hace que se desvíen de los criterios básicos que el CAD establece para que la ayuda internacional sea reconocida como Cooperación para el Desarrollo: la asistencia debe prestarse a los países en desarrollo, debe buscar el desarrollo económico o la mejora del nivel de vida, y debe ser en forma de donaciones o préstamos concesionales (Klingebiel, 2014).

La tabla 1 muestra los ocho tipos definidos de ayuda notificados en la base de datos SNPA/CRS (CAD, 2018). El propósito de la base de datos es ofrecer un conjunto de datos fácilmente disponibles que permitan analizar a dónde va la ayuda, a qué fines sirve y qué políticas aplicar, sobre una base comparable para todos los miembros del CAD. El seguimiento de la AOD es esencial para la toma de decisiones informadas y para garantizar que los esfuerzos de ayuda (incluidos, por supuesto, los proyectos) se asignen en la dirección correcta.

Tabla 1: Tipos de ayuda-descripción (adaptado de DAC, 2018)

Tipo de Ayuda	Descripción
Apoyo presupuestario	El donante transfiere fondos directamente al presupuesto del país receptor y renuncia al control exclusivo de los fondos, compartiendo la responsabilidad con el país receptor.
Contribuciones básicas bilaterales y programas y fondos comunes	El donante transfiere fondos a otra parte interesada y renuncia al control exclusivo de los fondos compartiendo la responsabilidad con esa otra parte interesada: otros donantes, ONG, instituciones multilaterales, etc.
Intervenciones tipo proyecto	El donante financia o implementa proyectos directamente. Estos incluyen proyectos de inversión y otras intervenciones, incluidos estudios de viabilidad, evaluaciones, ayuda canalizada a través de ONG o instituciones multilaterales, desarrollo de capacidades, etc.
Expertos y otra asistencia técnica	Suministro, fuera de los proyectos, de know-how en forma de personal, formación e investigación.
Becas y costes de estudiantes en países donantes	Concesiones financieras, contribuciones y costes asumidos indirectamente para estudiantes individuales de países receptores de ayuda.
Alivio de deuda	Agrupa todas las acciones relacionadas con la deuda: condonación, conversiones, intercambios, recompras, reprogramación y refinanciación.
Gastos administrativos no incluidos en otra parte	Gastos administrativos de los programas de asistencia para el desarrollo que no se hayan incluido en otras partidas de la AOD como parte integrante de los costes de prestación o ejecución de la ayuda prestada.
Otros gastos en el país donante	Agrupa las contribuciones que no dan lugar a un flujo transfronterizo.

Se debe reseñar que las "intervenciones tipo proyecto" son uno de estos ocho tipos definidos de AOD, lo que pone de manifiesto la importancia de los proyectos en el conjunto del sistema.

2.2. *Definiendo los Proyectos de Cooperación para el Desarrollo*

Además de la inclusión de los proyectos como una de las categorías para la presentación de informes, el CAD proporciona una definición clara del término proyecto como parte de las normas y requisitos de presentación de informes de la base de datos SNPA/CRS. En la tabla 2 que figura a continuación se muestra esta definición junto con las proporcionadas por los principales actores internacionales en el ámbito de la gestión de proyectos profesionalizada.

Tabla 2: Definiciones de Proyecto (negrita añadida)

Fuente	Definición
Comité de Ayuda al Desarrollo (DAC, 2018)	"Un proyecto es un conjunto de insumos, actividades y productos, acordados con el país socio, para alcanzar objetivos/resultados específicos en un marco temporal definido, con un presupuesto definido y un área geográfica definida. Los proyectos pueden variar significativamente en términos de objetivos, complejidad, cantidades empleadas y duración".
International Standard Organization - ISO 21500 (ISO, 2012)	Un proyecto consiste en un conjunto único de procesos que consisten en actividades coordinadas y controladas con fechas de inicio y finalización, realizadas para lograr los objetivos del proyecto. El logro de los objetivos del proyecto requiere la provisión de entregables que se ajusten a requisitos específicos. Un proyecto puede estar sujeto a múltiples restricciones [...]. Aunque muchos proyectos pueden ser similares, cada proyecto es único
Project Management Institute Lexicon (PMI, 2017)	"Un esfuerzo temporal emprendido para crear un producto, servicio o resultado único.".
PRINCE2 Glossary (Axelos, 2017)	"Una organización temporal que se crea con el propósito de entregar uno o más productos de negocio de acuerdo con un caso de negocio establecido".
International Project Management Association (IPMA, 2015)	"Un proyecto se define como un esfuerzo único, temporal, multidisciplinario y organizado para realizar entregables acordados dentro de los requisitos y restricciones predefinidos. El logro del objetivo del proyecto requiere que estos productos se ajusten a requisitos específicos [...]".
PM² - Metodología de Gestión de Proyectos (EC, 2018)	"Un proyecto es una estructura organizacional temporal establecida para crear un producto o servicio singular (entregable) con ciertas restricciones tales como el tiempo, coste y calidad. [...] Un proyecto exitoso termina cuando sus objetivos han sido alcanzados [...]".

La definición de proyecto del CAD está alineada con las ofrecidas por las organizaciones de gestión de proyectos que dan forma a las mejores prácticas reconocidas a nivel mundial en este campo. Todas las definiciones de proyectos incluyen los términos "productos" o "entregables" como un medio para lograr "objetivos" o "resultados". Esto es de suma importancia en los proyectos de Cooperación para el Desarrollo, ya que son, con mucha frecuencia, patrocinados o financiados por administraciones públicas (Ika & Hodgson, 2014) que perciben los proyectos de Cooperación para el Desarrollo como "*una forma de definir y gestionar claramente las inversiones y los procesos de cambio*" (CE, 2004). Las inversiones en proyectos de

Cooperación para el Desarrollo se deciden en función del cambio que generarán (consecución de objetivos) y no en función de los productos o entregables que se produzcan.

Un elemento diferenciador en la definición propuesta por el CAD es la inclusión de la "zona geográfica definida" como parte de los términos definitorios. Aunque no es inmediato, esto implica la subsecuente inclusión de la población asociada a dicho territorio. Los proyectos de Cooperación para el Desarrollo se consideran inversiones para lograr objetivos que provoquen un cambio (positivo) en las personas a las que dan servicio. Algunas agencias de desarrollo reconocen estos elementos en su propia definición de proyecto. Por ejemplo, la Agencia Española de Cooperación Internacional para el Desarrollo define: "Un proyecto es un conjunto autónomo de inversiones, actividades políticas y medidas institucionales o de otro tipo, diseñadas para lograr un objetivo de desarrollo específico en un determinado período de tiempo, en una determinada región geográfica y para un determinado grupo meta, que continuará generando bienes y/o servicios después de que se retire el apoyo externo, y cuyos efectos perduran una vez concluida la implementación" (AECID, 2001).

Este vínculo entre el proyecto, el territorio y su población meta es clave para caracterizar adecuadamente el contexto (físico, socioeconómico, cultural, etc.) y las relaciones entre los actores actuales que permitirán identificar y diseñar la acción necesaria para inducir el cambio. Además, esta definición incorpora explícitamente un asunto clave en los proyectos de Cooperación para el Desarrollo: la sostenibilidad de los entregables y de los efectos que desencadenan una vez finalizado el proyecto. En otros entornos de proyecto este elemento no se menciona porque se asume que el proyecto debe contribuir a generar los beneficios esperados por el promotor del proyecto, quien lógicamente está plenamente involucrado en el proyecto, contribuyendo a su éxito. Sin embargo, la "paradoja de la propiedad" en los proyectos de Cooperación para el Desarrollo implica que los propietarios finales de los entregables y los beneficiarios de los resultados del proyecto, la población meta, generalmente no son los promotores del proyecto ni los financiadores de este (Moya-Colorado, León-Bolaños y Yagüe-Blanco, 2021). Sin embargo, son clave para la sostenibilidad del proyecto, ya que están vinculados al territorio y permanecerán en él mientras que por lo general el promotor y el donante no mantienen un vínculo tan fuerte.

2.3. *El propósito de los Proyectos de Cooperación para el Desarrollo*

Los objetivos de la Cooperación para Desarrollo son muy amplios y abarcan, esencialmente, todos los sectores de la actividad humana. El establecimiento de objetivos compartidos en la Cooperación para el Desarrollo ha sido ampliamente debatido y ha evolucionado a lo largo de las décadas. En los orígenes, los objetivos

y métricas utilizados estaban esencialmente vinculados a la actividad y el crecimiento económicos, como el Producto Interior Bruto (PIB) per cápita. Pero en 1990, la ONU desarrolló un nuevo enfoque que abordaba y medía el bienestar humano centrando la atención en las personas y su potencial, oportunidades y opciones: así surgió el enfoque del desarrollo humano.

Bajo este enfoque, se desarrolló el Índice de Desarrollo Humano (IDH), incorporando a los indicadores de progreso económico, elementos vinculados a la salud (como la esperanza de vida al nacer) y la educación (años esperados de escolaridad). Sin embargo, el IDH capta sólo una parte de lo que significa el desarrollo humano. No refleja las desigualdades, la pobreza, la seguridad, el empoderamiento, etc. Así, en 2010, el Índice de Pobreza Multidimensional (IPM) incluyó indicadores adicionales para la medida del nivel de vida que no estaban presentes en el IDH, como el acceso al agua potable, saneamiento, electricidad, combustible para cocinar o la tenencia de activos familiares. Estos dos índices se utilizan hoy en día como la medida estándar del bienestar de la población y regularmente se publican informes con datos para cada país.

En 2015 se introdujo otra aproximación a la complejidad de la Cooperación para el Desarrollo, con la adopción de la Agenda 2030 para el Desarrollo Sostenible. Sobre la base de los anteriores Objetivos de Desarrollo del Milenio (ONU, 2000), la definición y aceptación de 17 Objetivos de Desarrollo Sostenible (ODS), 169 metas y 231 indicadores proporciona un marco integral de todas las dimensiones que afectan el bienestar humano (tabla 3). Este nuevo marco de objetivos incorpora elementos clave no solo para el bienestar humano (como la paz, la justicia y las instituciones sólidas –ODS 16) sino también para la sostenibilidad del planeta, inherentemente vinculada a él (como la acción por el clima– ODS 13).

Tabla 3: Los objetivos de desarrollo sostenible (ODS)

1. Fin de la pobreza	10. Reducción de las desigualdades
2. Hambre cero	11. Ciudades y comunidades sostenibles
3. Salud y bienestar	12. Producción y consume responsables
4. Educación de calidad	
5. Igualdad de género	13. Acción por el clima
6. Agua limpia y saneamiento	14. Vida submarina
7. Energía asequible y no contaminante	15. Vida de ecosistemas terrestres
8. Trabajo decente y crecimiento económico	16. Paz, justicia e instituciones sólidas
9. Industria, innovación e infraestructura	17. Alianzas para lograr los objetivos

Los ODS están fuertemente interconectados en una red intrincada que revela la complejidad y los problemas multidimensionales que abordan los proyectos de Cooperación al Desarrollo. La resolución o avance en un objetivo es casi imposible sin la confluencia de avances o resoluciones en otros. Desde el punto de vista de la gestión de proyectos, sería posible identificar los ODS con carteras, metas con programas y proyectos alineados con indicadores. Todos los proyectos de Cooperación al Desarrollo deben trabajar alineados con estos objetivos, metas e indicadores, como parte de un sistema que apunte al desarrollo humano de la población mundial.

2.4. *La importancia de los Proyectos de Cooperación para el Desarrollo*

La Cooperación para el Desarrollo se implementa principalmente en forma de proyectos, según los datos disponibles. En la figura 1 a continuación es posible observar el porcentaje de AOD que se ejecuta en forma de "intervenciones tipo proyecto" en los últimos 10 años, según la base de datos SNPA/CRS del CAD. El porcentaje es consistentemente superior al 50% (con un promedio del 51,8% en la serie observada), y los otros 7 tipos de ayuda comparten el porcentaje restante.
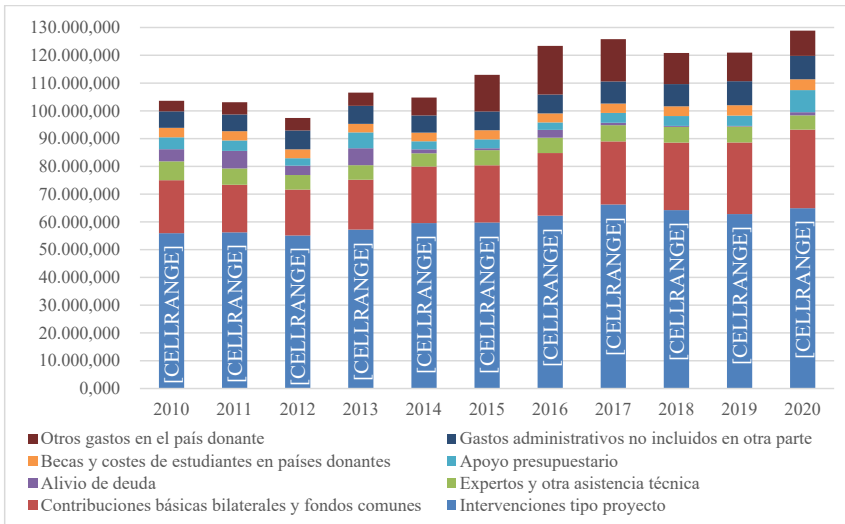

Figura 1: Distribución de la AOD por tipo en los países del CAD
(en Millones de USD 2020) Fuente DAC 2021

Cabe señalar que parte de la asistencia prestada con cargo al tipo de fondos "contribuciones básicas y programas y fondos comunes" también puede ejecutarse en forma de proyectos. Sólo varían los mecanismos de control de los donantes sobre

la financiación. Del mismo modo, la asistencia notificada como "expertos y otra asistencia técnica" también puede prestarse por medio de proyectos centrados en la creación de capacidad (capacitación, orientación, estudios, etc.) como actividad básica. Por lo tanto, además del porcentaje que se informa explícitamente como "intervenciones tipo proyecto", hay una parte adicional de la ayuda que también se ejecuta en forma de proyectos, elevando el porcentaje general mucho más allá del 51,8% observado. Con todo, los proyectos son, sin duda, el instrumento fundamental de la Cooperación para el Desarrollo.

2.5. *Partes interesadas en los Proyectos de Cooperación para el Desarrollo*

Hemos visto que los proyectos de Cooperación para el Desarrollo están claramente definidos, que dicha definición incluye el logro de objetivos acordados y que actúan sobre los territorios y sus poblaciones asociadas. De forma similar a la multidimensionalidad del desarrollo humano, la red de actores relevantes que participan en las actividades de Cooperación al Desarrollo incluye casi todas las formas de organización social humana: instituciones internacionales, gobiernos nacionales y locales, empresas privadas y organizaciones de la sociedad civil.

En este sentido, ya se ha sido dicho que: "*La Cooperación al Desarrollo es un laberinto*" (Develtere et al., 2021). En última instancia, todos los nodos de la red deben trabajar en beneficio de una población meta muy diversa. Esta diversidad se expresa en numerosos niveles, ya sea político, social, cultural, religioso, etc. Al igual que el alcance de los proyectos, la red de partes interesadas en los proyectos de Cooperación al Desarrollo es amplia, profunda y compleja. La forma en que todas las partes interesadas involucradas interactúan entre sí y contribuyen al proyecto es un factor fundamental de éxito.

Solo el sistema de las Naciones Unidas está compuesto por 80 órganos, fondos, agencias, comisiones, cuerpos, departamentos y oficinas diferentes (ONU, 2021). Los 38 miembros actuales de la OCDE suelen tener sus propias agencias bilaterales de desarrollo a nivel nacional, pero también existe una amplia red de cooperación descentralizada, en la que los gobiernos locales (es decir, los municipios) también participan en actividades de cooperación para el desarrollo (Bontenbal y van Lindert, 2009). Existen innumerables organizaciones no gubernamentales (ONG) que van desde organizaciones internacionales como la Cruz Roja hasta organizaciones locales de base que también participan en actividades de cooperación para el desarrollo. Desde el punto de vista geográfico, la Cooperación para el Desarrollo involucra a países de todos los continentes en la cooperación norte-sur y sur-sur, y desempeña un papel en la configuración de la política internacional.

También debe tenerse en cuenta el papel de la sociedad civil a nivel de base. Las ONG locales desempeñan un papel fundamental en dos ámbitos diferentes pero complementarios. En primer lugar, son los más adecuados para interactuar

con la población meta de igual a igual, comprendiendo íntegramente el contexto (socioeconómico, cultural, religioso, etc.) desde el interior y actuando como una contraparte fundamental para todas las organizaciones externas que participan en proyectos de Cooperación para el Desarrollo. En segundo lugar, también pueden actuar como agentes de referencia ante las autoridades locales solicitando la rendición de cuentas necesaria a todos los actores en nombre de las poblaciones meta, promoviendo la sostenibilidad de los proyectos desde dentro. En contextos inestables, el papel de la sociedad civil es clave para la promoción de la democracia, el estado de derecho, la justicia social y los derechos humanos. En este sentido, cabe señalar la necesidad y la responsabilidad de incluir componentes de creación de capacidades en los proyectos de Cooperación para el Desarrollo para reforzar estos dos ámbitos clave.

2.6. *Caracterización de los Proyectos de Cooperación para el Desarrollo*[1]

Los proyectos de Cooperación para el Desarrollo han sido estudiados y caracterizados desde varios puntos de vista. Golini & Landoni (2014), realizaron una revisión de la literatura disponible sistematizando las características de los proyectos de Cooperación para el desarrollo. Según su estudio, hay algunas características comunes de los proyectos de cooperación al desarrollo, que suelen estar presentes al mismo tiempo y que influyen en su gestión. Boakye y Liu (2016) han identificado causas de fracaso en estos proyectos, señalando que la mayoría de ellas, si no todas, se han mencionado una y otra vez en la literatura existente sobre gestión de proyectos. Hermano et al. (2013) identificaron y sistematizaron los Factores Críticos de Éxito (FCE) para proyectos de Cooperación para el desarrollo y seleccionaron 7 de ellos, reconociendo la multiplicidad y la falta de consenso sobre ellos. En la tabla 4 se resumen estas cuestiones.

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1. Esta sección está basada en la comunicación presentada por los autores en el 23º Congreso Internacional de Gestión de Proyectos e Ingeniería, Málaga, 10th – 12th July 2019. 06-003. (Moya-Colorado & Yagüe Blanco, 2019). "Exploring the adequacy of openPM² to European Union – funded international development grant projects implemented by Civil Society Organizations".

Tabla 4: Características de los Proyectos de Cooperación para el Desarrollo

Características (Golini and Landoni, 2014)	Causas de fracaso (Boakye & Liu, 2016)	Factores Críticos de Éxito (Hermano et al., 2013)
Falta de un cliente definido y/o influyente	Mala planificación del proyecto	Trabajo en equipo
Alto número de partes interesadas	Débil supervisión	Entorno local
Entornos difíciles, complejos y de alto riesgo	Bajo compromiso por parte del gobierno anfitrión	Enfoque de implementación
Escasez de recursos	Pobre gestión	Oportunidades de aprendizaje
Dificultad en el uso de técnicas de gestión de proyectos en el contexto de otras culturas	Falta de flexibilidad	Características de las políticas
Presencia de entregables intangibles, que pueden resultar difíciles de definir y medir	Mala calidad de insumos	Disponibilidad de recursos
	Sesgo de optimismo	Satisfacción de las partes interesadas/beneficiarios
	Falta de personal del proyecto	
	Factores exógenos	
	Contratistas ineficaces	
	Retrasos en la puesta en marcha del proyecto	
	No admitir el fracaso	
	Complejidad del proyecto	

Adicionalmente, estos proyectos son enormemente diversos, como lo son también en otras áreas. En este caso, la diversidad proviene de múltiples dimensiones. Ya hemos visto la variabilidad de los sectores, vinculados a los ODS. El tamaño de la inversión es otro elemento de diversidad, con proyectos que van desde micro intervenciones centradas en una pequeña región con una población meta limitada, hasta proyectos nacionales que abarcan a toda la población de un país. La diversidad de la red de partes interesadas también puede ser amplia, desde proyectos implementados con un número limitado de actores hasta proyectos que involucran a representantes de todos los niveles posibles, de agencias de cooperación internacional, autoridades nacionales y locales, ONG internacionales y locales y representantes de la población local.

En términos de plazo, los proyectos de Cooperación al Desarrollo también son muy variables. Van desde proyectos pequeños con un alcance restringido y recursos financieros modestos que duran unos pocos meses hasta proyectos más grandes con alcances y asignaciones presupuestarias más significativos que pueden durar varios años. Los grandes proyectos pueden reproducirse o ampliarse en fases sucesivas o pueden agruparse en programas cuando involucran diferentes componentes con objetivos y recursos compartidos. Debido a la ya mencionada naturaleza principal

de las inversiones públicas en proyectos de Cooperación al Desarrollo, es posible que los procesos de toma de decisiones requeridos para la asignación de las inversiones estén vinculados a los ciclos políticos en los países donantes.

3. Gestión de Proyectos en la Cooperación para el Desarrollo

La gestión de proyectos ha sido reconocida como una disciplina autónoma durante mucho tiempo (Weaver, 2007). Existen numerosas herramientas, técnicas, enfoques, metodologías y estándares que proporcionan directrices y orientación en la identificación, diseño, formulación, planificación, implementación, monitoreo y evaluación de proyectos. La gestión de proyectos ha evolucionado paralelamente al sistema de Cooperación para el Desarrollo y ha proporcionado herramientas y enfoques específicos para estos proyectos. Sin embargo, la influencia de la disciplina de gestión de proyectos en los proyectos de Cooperación al Desarrollo no ha sido tan importante como en otros sectores o áreas de actividad humana.

Los modelos lógicos están en el centro del enfoque de proyectos en Cooperación para el Desarrollo (Ferrero & Zepeda, 2014). El Enfoque del Marco Lógico (EML) se conceptualizó inicialmente a fines de la década de 1960 para ser utilizado por la Agencia de los Estados Unidos para el Desarrollo Internacional (USAID) como una matriz de planificación para el diseño y la evaluación de proyectos (Sartorius, 1996). Posteriormente se mejoró al incluir procesos para el diseño y planificación de proyectos, integrando un proceso basado en resultados (Bakewell & Garbutt, 2005; Vázquez et al., 2014). Posteriormente, el enfoque se integró en la Gestión del Ciclo de Proyectos (GCP) para incluir una forma específica no solo de planificar, sino también de gestionar, monitorear y evaluar proyectos de Cooperación al Desarrollo (Vázquez et al., 2014).

3.1. *El enfoque de marco lógico y la gestión de ciclo de proyecto*

Está ampliamente aceptado que el EML es la herramienta estándar *de facto* para la gestión de proyectos de Cooperación para el Desarrollo (Landoni & Corti, 2011; Ringhofer y Kohlweg, 2019). El EML es un proceso analítico participativo para el diseño, la planificación y la gestión de proyectos. Sigue una serie de pasos lineales y utiliza herramientas definidas para obtener una comprensión profunda de los elementos involucrados en un proyecto. Los elementos clave en el proceso son:

- La participación de las partes interesadas en el proceso para garantizar el compromiso, la propiedad y la sostenibilidad es un elemento fundamental en el EML. El proceso generalmente implica una serie de talleres o reuniones de consulta donde se incluyen, procesan y analizan todos los puntos de vista de los involucrados en el proyecto. Esta dinámica participativa es el principal insumo de información en la identificación de proyectos.

- La identificación de vínculos causa-efecto en los problemas identificados con el fin de actuar en la raíz de las causas y proporcionar soluciones eficaces. El proceso pretende establecer un objetivo y tomar medidas a un nivel significativo, donde los problemas se resuelven en su raíz y no en su efecto o síntoma visible. Como ya se ha mencionado, los proyectos de Cooperación al Desarrollo se centran en el logro de objetivos y no en la producción de productos o entregables.

El EML generalmente se estructura en 3 fases: análisis, diseño y planificación, cada una de las cuales tiene varios pasos y genera productos específicos. La figura 2 proporciona un diagrama que indica la secuencia lógica en el proceso.
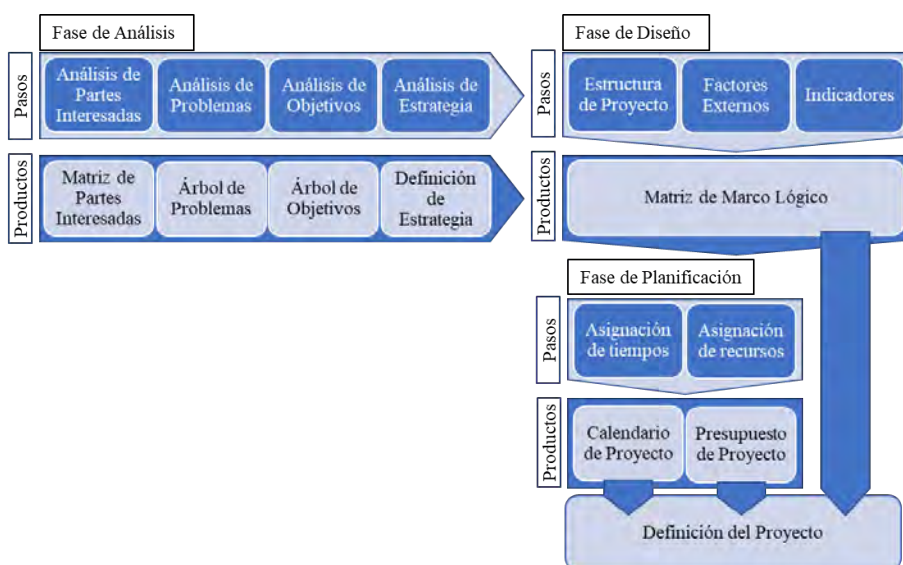

Figura 2 Diagrama del EML, sus fases, pasos y productos específicos

Es de suma importancia diferenciar el EML como un proceso analítico, y la Matriz del Marco Lógico (MML), que es el resultado documentado del proceso analítico (CE, 2004). La MML se basa en la información proporcionada por el análisis previo y los productos del proceso, incorporando análisis adicionales sobre la estructura del proyecto (validez de la lógica interna causa-efecto, factores externos que afectan al proyecto e indicadores y fuentes de información objetivamente verificables). La MML proporciona además la información necesaria sobre las actividades y los recursos necesarios para alcanzar los objetivos establecidos, para establecer un cronograma del proyecto y un presupuesto de este.

Sin embargo, a menudo sucede lo contrario y el EML se identifica con frecuencia con la MML. La MML proporciona un formato estandarizado (Couillard, Garon &

Riznic, 2009) que resume los elementos clave de un proyecto, como los objetivos, el alcance, las actividades, así como los factores de éxito, riesgos e indicadores. Los productos finales del EML, a saber, la MML, junto con el cronograma y el presupuesto, proporcionan en última instancia una definición de los elementos del Triángulo de Hierro, proporcionando el alcance, el marco temporal y los costes de un proyecto. El Triángulo de Hierro es un esquema ampliamente conocido para la gestión de proyectos que se remonta a la década de 1950 (Atkinson, 1999) y que se ha considerado obsoleto: "la investigación ha comenzado a sugerir cada vez más que, aunque el Triángulo de Hierro es importante, no cuenta toda la historia del éxito del proyecto" (Monje, 2018).

La MML ha evolucionado, y puede tomar diferentes formas, pero en su representación elemental es una matriz 4x4 que incluye una descripción de la cadena lógica que vincula las actividades con los objetivos, la forma de medir los logros y los factores externos que influyen en el proyecto y que se requieren para cumplir con los logros. La figura 3 ofrece una representación de una MML como modelo:
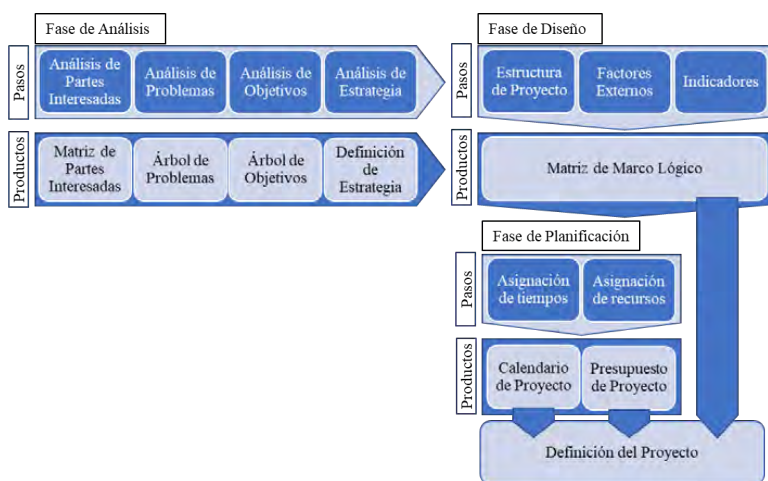

Figura 3: Modelo de Matriz de Marco Lógico

Los tres documentos mencionados, MML, cronograma y presupuesto, son un requisito frecuente para los donantes en la Cooperación para el Desarrollo. Juntos, proporcionan una definición de proyecto que permite la comparación y evaluación armonizadas de proyectos para tomar decisiones de financiación. De hecho, existe un vínculo directo entre la MML y el seguimiento y evaluación de los proyectos de Cooperación para el Desarrollo. La disponibilidad y el uso de indicadores es clave en la gestión de los proyectos (Montero et al., 2015), y la MML proporciona indicadores para medir el logro de objetivos. Pero lo que es más importante, existe un vínculo directo entre los elementos de la MML y los criterios más habituales utilizados en la evaluación de proyectos, a saber: relevancia, eficiencia, eficacia, impacto y sostenibilidad, como se puede observar en la figura 4.
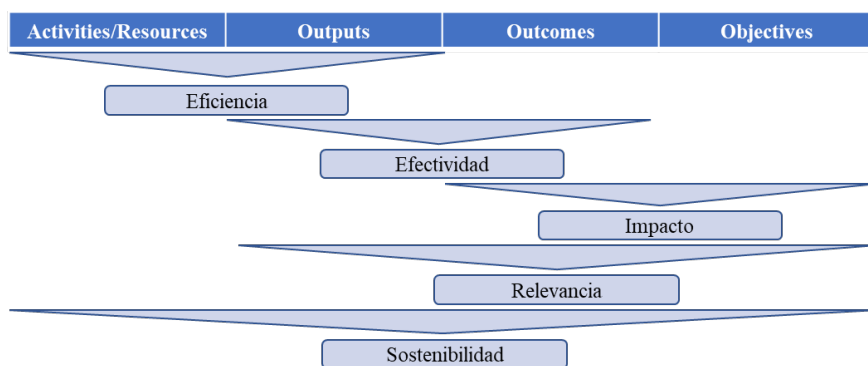
Activities/Resources	Outputs	Outcomes	Objectives

Eficiencia

Efectividad

Impacto

Relevancia

Sostenibilidad

Figura 4: Vínculos entre la MML y los criterios de evaluación (IUDC, 1997)

Llevar a cabo adecuadamente el proceso de EML tal como se ha descrito, de manera participativa, para analizar las partes interesadas, los problemas, los objetivos y la estrategia; requiere un tiempo, costo y esfuerzo considerables. Esto no siempre se hace, y un diseño deficiente asociado con la dificultad para involucrar a los beneficiarios locales o la insensibilidad a sus necesidades han sido identificados como una de las causas de fracaso en los proyectos de Cooperación al Desarrollo (Ika, 2012).

La GCP parece proporcionar un marco de trabajo más amplio para los proyectos de Cooperación para el Desarrollo que debe formar parte de la política de un donante. En esencia, es una secuencia circular de fases que abarca tres principios fundamentales: la provisión de criterios y procedimientos de toma de decisiones en cada fase; progresividad en términos de finalización previa de una fase antes de avanzar a la siguiente; y la retroalimentación recurrente de un ciclo al siguiente por medio del monitoreo y la evaluación como un proceso estructural para capturar la experiencia aprendida. Las cinco fases clásicas en la GCP son: 1) Programación, 2) Identificación, 3) Formulación, 4) Implementación y 5) Evaluación y auditoría, que alimentan la siguiente fase de Programación. PCM tiene como objetivo garantizar la alineación con las prioridades de todas las partes interesadas, la relevancia de las estrategias acordadas, la viabilidad y la sostenibilidad probable. Para ello, utiliza e integra el EML como parte del proceso analítico necesario (CE, 2004).

3.2. *Limitaciones del EML*

Los modelos lógicos, como el EML, se basan en relaciones hipotéticas de causa-efecto identificadas que tienen como objetivo explicar cómo las actividades del proyecto producirán entregables planificados que contribuirán al logro de los resultados previstos y los objetivos a largo plazo (Ferrero y Zepeda, 2014). Las limitaciones en estos modelos están dadas por el aislamiento implícito de los vínculos hipotéticos

causa-efecto identificados, tratando los proyectos como sistemas cerrados, controlados e inmutables en los que se ignoran los "elementos del proceso" (Mosse et al., 1998). En el caso de los proyectos de Cooperación para el Desarrollo, ignorar estos elementos puede llevar a eludir el objetivo principal de la intervención: el proceso de desarrollo humano y su sostenibilidad, que depende en gran medida de los vínculos entre los procesos de desarrollo generados y los actores involucrados (Yagüe et al., 2013). El resultado es una rigidez que también se deriva de enfoques heredados de los campos de la ingeniería, la construcción y la economía, que están dominados por supuestos que incluyen racionalidad estricta, objetividad, reduccionismo y expectativas de validez universal (Ika y Hodgson, 2014), pero que pueden no considerar las especificidades del contexto, su complejidad y su naturaleza cambiante.

El EML debería incluir estas especificidades como parte de su dimensión participativa, pero su aplicación práctica a menudo deriva en la concentración de esfuerzos para definir una MML que sea aceptable para el donante, ya que a menudo es un requisito previo para la financiación de proyectos por parte de las principales agencias donantes (Rodríguez-Rivero et al., 2021). Los donantes utilizan las MML como un instrumento normalizado para la evaluación de propuestas y herramientas para el monitoreo y la evaluación de proyectos, pero la importancia del proceso participativo que debe activarse para garantizar un adecuado nivel de compromiso y una mayor sostenibilidad, a menudo se minimiza o ignora.

Esto puede conducir a nuevos problemas en términos de gobernanza, entendida como la corresponsabilidad en la toma de decisiones para la resolución de problemas colectivos y el logro del bien común (Aguilar, 2013; Fontana y Yagüe, 2012). Los proyectos de Cooperación para el Desarrollo necesitan modelos de gobernanza claros que asignen roles y responsabilidades dentro del proyecto y para facilitar los logros del proyecto en términos de toma de decisiones, eficiencia y rendición de cuentas. Se debería contar con mecanismos para asegurar la participación de la población meta y de las partes interesadas.

A pesar de su amplia aceptación, se considera que el EML también tiene otras limitaciones. Se considera que el EML en sí es un marco ineficiente y limitado para la gestión de proyectos de Cooperación para el Desarrollo (Hermano et al., 2013). Incluso junto con un cronograma y un presupuesto del proyecto, la MML no proporciona suficiente capacidad de gestión del proyecto, especialmente durante la implementación del proyecto. Si bien proporciona una sólida justificación del proyecto, una definición del proyecto y un mecanismo de monitoreo; hay ciertas áreas de la gestión de proyectos para las cuales el EML no proporciona ninguna información. El EML carece de un modelo de gobernanza que asigne roles y responsabilidades dentro del proyecto en términos de toma de decisiones, eficiencia y rendición de cuentas. Esto, junto con la rigidez de la MML una vez aprobada y su poca adaptabilidad a las condiciones cambiantes, han sido identificados como unas serias limitaciones del EML (Couillard, Garon & Riznic 2009).

Hay otras áreas de gestión de proyectos en las que el EML también muestra fuertes limitaciones, como la gestión de riesgos, ya que los factores externos (también a menudo designados como "supuestos") a veces se identifican como riesgos cuando en realidad deben considerarse factores de éxito. Los factores externos que se incluyen en la MML rara vez están sujetos a gestión (Yamaswari et al., 2016). En los contextos a menudo inestables y cambiantes en los que se ejecutan los proyectos de Cooperación para el Desarrollo, el tratamiento de la gestión de riesgos requeriría un tratamiento más importante que el proporcionado por el EML. Rodríguez Rivero et al. (2021) han evaluado varias propuestas para mejorar el EML y concluyeron que sería necesario incorporar en la MML dimensiones que permitan integrar la gestión de riesgos, costo y beneficio y la dimensión tiempo. Del mismo modo, el ALF no proporciona orientación para la gestión de la calidad, los requisitos, las incidencias, el cambio, las comunicaciones o la coordinación del equipo (Moya-Colorado, León-Bolaños y Yagüe-Blanco, 2021).

3.3. *La gobernanza en los proyectos de cooperación para el desarrollo*

En términos generales, la Cooperación para el Desarrollo está dominada por un esquema donante-receptor. Esto ha cambiado en los últimos años con la incorporación al sistema de nuevos países donantes y grandes actores filantrópicos privados, pero siempre hay un flujo de fondos involucrados o un mecanismo por el cual uno apoya a otro, que establece una relación de dos partes en el centro de todas las iniciativas de Cooperación para el Desarrollo. Esto afecta fuertemente la forma en que se gestionan los proyectos. Incluso si las dos partes acuerdan objetivos, asignación presupuestaria, alcance, procedimientos, propiedad, etc., hay muchos elementos que están sujetos a fricciones en términos de roles, responsabilidades, toma de decisiones y mecanismos de rendición de cuentas a lo largo de la cadena que vincula políticas, estrategias y objetivos con las actividades sobre el terreno que finalmente afectan a las poblaciones meta en los proyectos de Cooperación para el Desarrollo.

En este sentido, es necesario referirse al elemento que vincula los ODS con la población meta y las instituciones que trabajan en su beneficio, que es el marco de los Derechos Humanos. En 2003, los organismos de las Naciones Unidas acordaron un entendimiento común sobre un enfoque basado en los derechos humanos (EBDH) para la Cooperación para el Desarrollo (ONU, 2003). El EBDH es un marco conceptual basado en normas de derechos humanos dirigidas al logro del desarrollo humano mediante la promoción y protección de los derechos humanos.

El EBDH prevé que todas las políticas, estrategias, planes y proyectos de Cooperación para el Desarrollo estén alineados con los derechos y obligaciones establecidos por el derecho internacional. Prevé un cambio de paradigma: de las necesidades a los derechos y de la solidaridad a las obligaciones legales. El EBDH

se basa en los principios de derechos humanos (universalidad, indivisibilidad, igualdad y no discriminación, participación y rendición de cuentas) y en la importancia de desarrollar las capacidades tanto de los "titulares de obligaciones" para cumplir con sus obligaciones por medio de mecanismos de rendición de cuentas, como de los "titulares de derechos" para reclamar sus derechos mediante la participación en los procesos de toma de decisiones. La figura 5 proporciona una visión esquemática de estas interacciones entre estos dos lados. Las ONG, tanto internacionales como locales, desempeñan un papel decisivo en la interacción entre los titulares de deberes y los titulares de derechos a todos los niveles, tanto con los donantes como con las autoridades locales.
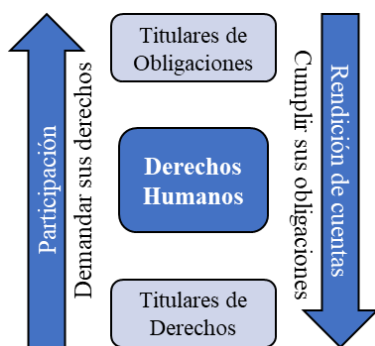
Figura 5: Aproximación basada en los Derechos Humanos.
Adaptación de (Finnish Committee for UNICEF, 2015)

Los ODS como objetivos acordados globalmente se basan y están íntimamente ligados a los derechos humanos. "*Más del 90 por ciento de los objetivos y metas de los ODS corresponden a obligaciones de derechos humanos. A medida que los Estados miembros avanzan en los ODS, avanzan en sus obligaciones en materia de derechos humanos: son dos caras de la misma moneda*". (Rattray, 2019). Bajo esta visión, el EBDHs debería superar la dinámica donante-receptor e impulsar la gobernanza de los proyectos de Cooperación para el Desarrollo.

3.4. *Retos para los directores de proyecto de cooperación para el desarrollo*

Además de las limitaciones ya mencionadas que muestra la herramienta estándar de facto para la gestión de proyectos en Cooperación para el Desarrollo, también debe tenerse en cuenta que, en el contexto donde se implementan los proyectos de Cooperación para el Desarrollo, los profesionales de la gestión de proyectos no abundan. "La mayoría de los profesionales del Desarrollo Internacional son gerentes de proyectos "accidentales", ya que tienen responsabilidades

de gestión de proyectos y programas, pero carecen de educación y antecedentes formales en gestión de proyectos". (Ika, 2012). En términos generales, "el mundo en desarrollo se caracteriza por una escasa capacidad de gestión de proyectos" (Boakye y Liu, 2016).

Sin embargo, existe un reconocimiento general sobre la importancia de incorporar mejores prácticas de gestión de proyectos para mejorar el éxito de los proyectos. Los directores de proyectos que trabajan en proyectos de Cooperación para el Desarrollo se beneficiarían de una mayor incorporación de buenas prácticas internacionalmente reconocidas desarrolladas en el campo de la gestión de proyectos aplicadas a otros tipos de proyectos. Y probablemente agradecerían la adaptación e integración de algunas de esas buenas prácticas a las realidades, necesidades y limitaciones específicas que enfrentan en sus proyectos.

En el pasado, varias agencias internacionales de ayuda han desarrollado sus propios estándares y han apoyado la correspondiente capacitación y formación en los países en desarrollo (Golini, Kalchschmidt y Landoni, 2014). En el caso de los proyectos implementados por Organizaciones No Gubernamentales (ONG), PM4NGO ha desarrollado directrices específicas para integrar el EML con otras prácticas de gestión de proyectos incluidas en el cuerpo de conocimiento de la gestión de proyectos PMBOK® (Hermano et al., 2013). Golini, Kalchschmidt y Landoni (2014) estudiaron que los directores de proyectos de ONG valoran la adopción de herramientas y métodos de gestión de proyectos. Su trabajo revela que "en las ONG, algunas herramientas de gestión de proyectos se adoptan con frecuencia (por ejemplo, el marco lógico, o los informes de progreso), mientras que otras parecen estar descuidadas (por ejemplo, el método de la ruta crítica, el registro de incidencias, el sistema de gestión de valor ganado)". Por lo general, es más probable que las ONG adopten técnicas simples a que se centren en metodologías más estructuradas y analíticas. Según sus conclusiones, hay "*evidencia sobre la adopción y el impacto de las herramientas de gestión de proyectos en el desempeño de los proyectos de las ONG*". Sin embargo, existe un debate en curso sobre la necesidad de fomentar un nuevo estándar internacional para los proyectos de Cooperación para el Desarrollo (Landoni & Corti, 2011).

Esta problemática en los proyectos de Cooperación para el Desarrollo existe desde hace mucho tiempo. También puede estar relacionado con una alta rotación de personal debido a las condiciones de trabajo a menudo duras en estos proyectos. Sin embargo, la profesionalización en la gestión de proyectos ha alcanzado una mayor extensión en otros campos donde los proyectos también son de suma importancia, como la ingeniería, la construcción o el desarrollo de soluciones informáticas. Los directores de proyecto hoy en día enfrentan mayores desafíos vinculados a una mayor complejidad, donde una mayor participación y flexibilidad de las partes interesadas se están convirtiendo en factores importantes de éxito. La irrupción de las metodologías ágiles y su integración con metodologías predictivas

clásicas (como el EML) en metodologías híbridas están transformando la forma de entender muchos proyectos y podrían muy bien ofrecer herramientas y soluciones interesantes para gestionar proyectos de Cooperación para el Desarrollo.

Sin embargo, existe una necesidad patente de superar las limitaciones del EML y su posición como solución universal para resumir un proyecto e impulsar su gestión. La adopción de metodologías integrales de gestión de proyectos o al menos una combinación adecuada de herramientas, técnicas o mejores prácticas aceptadas a nivel mundial en el campo de la gestión de proyectos, para complementar el EML y proporcionar un enfoque más completo y una imagen más amplia de todos los elementos clave y factores de éxito en un proyecto de Cooperación para el Desarrollo, podría resultar positivo. El desarrollo de un modelo de lienzo estandarizado que refleje estos, como sugiere Nieto-Rodríguez (2021), podría ser una buena alternativa.

3.5. *Contribución de los proyectos de cooperación para el desarrollo*

A pesar del abierto debate existente sobre la eficacia de la ayuda, discutido globalmente en los diferentes Foros de Alto Nivel sobre la Eficacia de la Ayuda (Roma en 2003, París en 2005, Accra en 2008, Busan en 2011 y México en 2014), y sobre el papel de la ayuda en términos generales, el mundo es mejor hoy que hace 75 años si observamos los cambios en el largo plazo. La tendencia general en términos de Desarrollo Humano global muestra que el mundo ha avanzado enormemente incluso en los últimos 30 años, desde que se comenzó a medir el IDH (Figura 6). Otros indicadores, con series disponibles más largas, muestran niveles similares de avance. En 1950, la esperanza de vida al nacer en el mundo era de 45,7 años, mientras que en 2019 era de 72,6 años. Níger aparece penúltimo en el IDH en el informe de 2021 y, sin embargo, la mortalidad infantil de menores de 5 años se ha reducido a 75,3 muertes por más de 1.000 nacidos vivos, de las 320 registradas en 1970 (Gapminder, 2022).

Las desigualdades siguen existiendo, con una gran brecha entre los países con alto desarrollo humano y los países menos desarrollados, con bajo desarrollo humano, pero el bienestar de la población mundial sin duda ha mejorado (Prados de la Escosura, 2018). Hans Rosling demuestra indiscutiblemente en su libro "Factfulness" (Rosling, 2018), que hay una serie de sesgos instalados en la mente de las personas que ofrecen una gran resistencia al reconocimiento fáctico de que el mundo está evolucionando en la dirección correcta.
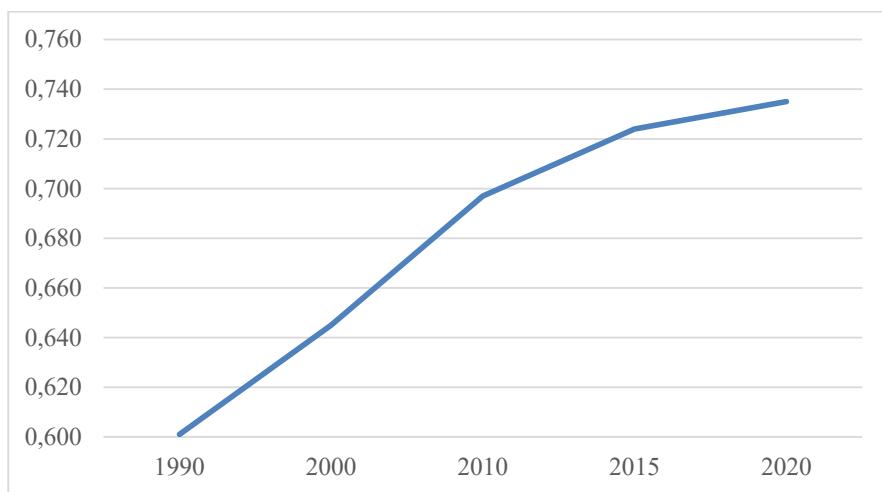
Figura 6 Evolución del Índice Global de Desarrollo Humano mundial (1990-2020) (UN, 2021)

Los proyectos y programas desempeñan un papel fundamental en el complejo sistema de Cooperación para el Desarrollo, ya que son el principal mecanismo de AOD, pero no solo. Posibilitan el trabajo en todo el mundo, basados en objetivos compartidos, en una multitud de sectores y conectando una intrincada red de partes interesadas. Son un elemento clave en la evolución del mundo. Un mundo cada vez mejor.

4. Perspectivas de futuro en los proyectos de cooperación para el desarrollo

Cuando se estaba escribiendo este capítulo, la población del mundo alcanzó los 8.000 millones de personas. Fue anunciado en los medios de comunicación y, durante unos días, fue tema de discusión y preocupación. Se cuestionó la capacidad del mundo para sostener a dicha población e incluso hubo quienes lo conectó con una percepción pesimista general sobre la forma en que el mundo está actualmente haciendo frente a otros eventos como la pandemia de COVID-19, la emergencia del cambio climático, la guerra en Ucrania o la polarización global.

Sin embargo, como hemos visto, en el largo plazo el mundo va a mejor. Pero el trabajo está lejos de completarse y hay numerosas áreas en las que los proyectos de Cooperación al Desarrollo pueden mejorar para aumentar su contribución a las tendencias positivas que hemos visto. Algunas de las áreas en las que se podrían introducir mejoras son las siguientes.

Tomando la Agenda 2030 para el Desarrollo Sostenible como marco de trabajo acordado para los objetivos de los proyectos, sería recomendable incidir en la

necesidad de incrementar la alineación de los proyectos de Cooperación para el Desarrollo con los ODS, tomando los objetivos, metas e indicadores como elementos comunes a la hora de definir, diseñar, planificar, monitorear y evaluar proyectos. El uso coherente de los indicadores de los ODS al aplicar el EML podría proporcionar una mayor coherencia y comparabilidad de los proyectos, lo que permitiría una mayor eficiencia y oportunidades de aprendizaje. También podría ser factible integrar el enfoque PPP (Portafolio – Programa – Proyecto) en la secuencia lógica que comparten el EML/GCP y los ODS en términos de alineación estratégica. Dado que existe un acuerdo global sobre los objetivos, metas e indicadores, su uso e integración en todos los proyectos y en toda la cadena lógica, desde la política general hasta la tarea implementada en el campo, podría beneficiar en todos los aspectos de la gestión de proyectos, como elemento clave para la definición del alcance.

La gobernanza de los proyectos en la Cooperación para el Desarrollo debe aclarar la "paradoja de la propiedad" que se deriva de la diversidad de intereses y prioridades de los donantes, receptores y socios implementadores. El marco de trabajo en términos de gobernanza del proyecto debe ser el EBDH, que proporciona una base legal que respalda los ODS y que reemplaza otros enfoques basados en las necesidades o la solidaridad para lograr mayores niveles de Desarrollo Humano. La participación es un elemento clave que comparten el EML/GCP y el EBDH y puede integrarse en un modelo compartido de gobernanza de proyectos que establezca claramente roles, responsabilidades, mecanismos de toma de decisiones y rendición de cuentas. Los proyectos de Cooperación para el Desarrollo podrían beneficiarse de la adopción de instrumentos y técnicas específicos desarrollados en el ámbito de la gestión de proyectos para aumentar la participación de las partes interesadas y mejorar la gobernanza de los proyectos.

El EML a menudo no se aplica plenamente, concentrando frecuentemente los esfuerzos en la definición de una MML que responda a las necesidades y expectativas de los donantes. La MML termina siendo un compromiso rígido con una capacidad limitada para adaptarse a las condiciones cambiantes del proyecto. Es frecuente que la MML sea tomada como el documento central que define un proyecto, por su fuerte capacidad para resumir propósito y métricas. Los proyectos de Cooperación para el Desarrollo se benefician enormemente de la estructura lógica y la visión sintética que la MML proporcionan en términos de identificación, diseño, monitoreo y evaluación de proyectos, pero debe complementarse con otras herramientas para facilitar la gestión profesional de proyectos basada en buenas prácticas reconocidas e integrarla en una herramienta similar a un lienzo / cuadro de mandos que reconozca y proporcione la perspectiva multidimensional que los directores de proyecto necesitan a lo largo de todo el ciclo de vida del proyecto.

De hecho, los directores de proyectos de Cooperación para el Desarrollo se enfrentan a tantos retos y limitaciones como en cualquier otro campo. Quizás incluso más, dadas las particularidades que hemos visto al presentar estos proyectos.

La Cooperación para el Desarrollo no se ha beneficiado plenamente de las ventajas derivadas de la experiencia, el conocimiento y la estandarización proporcionados por la práctica profesionalizada en gestión de proyectos. Es necesario fortalecer las capacidades y profesionalizar el papel del director de proyectos de Cooperación para el Desarrollo. Aumentar la adopción de metodologías y estándares de gestión de proyectos, o desarrollar nuevas metodologías que superen las limitaciones del LFM integrando elementos cruciales que no cubre, como el componente de tiempo, la distribución de roles, responsabilidades y asignación de responsabilidades, gestión de riesgos, participación de las partes interesadas, control de calidad, etc. Se debe poner a disposición un enfoque integral de la gestión de proyectos de Cooperación para el Desarrollo para mejorar su incuestionable contribución a un mundo mejor para todos, proyecto a proyecto.

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Proyectificación y la academia

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Resumen

La proyectificación de la academia permite mejorar la competitividad de las universidades, para responder mejor a las demandas cada vez más exigentes de la sociedad. La proyectificación permite que los académicos puedan organizar mejor el conjunto heterogéneo de actividades que integran la labor docente. Ayuda gestionar mejor los proyectos de investigación y a elaborar mejores propuestas en las convocatorias públicas. En la gestión de la universidad, la implantación de estructuras organizativas como la Oficina de Dirección Proyectos (PMO, Project Management Office) permite desplegar la estrategia universitaria por medio de un conjunto de proyectos, fijando prioridades y optimizando su gestión al compartir recursos. La proyectificación también conlleva cambios en la cultura organizativa. Los procesos de cambio deben realizarse con el consenso y el ritmo adecuado, para que la academia no pierda sus valores ancestrales de excelencia, flexibilidad y autonomía.

Palabras clave: proyectificación de universidades; proyectos de investigación; oficina de dirección de proyectos; gestión de universidades.

1. Introducción

Desde la publicación del trabajo de Midler (1995) describiendo la experiencia del grupo de automoción Renault, el interés por la proyectificación de las organizaciones ha crecido de forma exponencial, abordándose aspectos sobre su implementación, y analizándose las implicaciones que conlleva para empresas, administraciones y para la sociedad en su conjunto.

El mundo académico no es ajeno ni puede ser ajeno a esta tendencia: por una parte, muchas de las actividades que realizan las universidades son, o bien proyec-

tos, o bien proyectizables de forma natural; por otra, las metodologías y estándares que proporciona la dirección de proyectos pueden ayudar a las universidades a acometer los retos del futuro próximo.

Eschenbach et al. (2005) destacaban que gran parte de la actividad del profesor universitario puede verse como un conjunto de proyectos: impartir asignaturas, escribir artículos científicos, redactar propuestas de proyectos de investigación para distintas convocatorias públicas y privadas, preparar materiales docentes, etc. En todas ellas existen limitaciones de tiempo y de recursos disponibles, y cuentan con unos objetivos que cumplir.

La institución universitaria realiza actividades que son claramente proyectos. Tal es el caso, por ejemplo, de los proyectos de investigación, proyectos de desarrollo e implantación de tecnologías de información y comunicaciones, proyectos de construcción y mejora de edificios e instalaciones, etc. Pero hay muchas otras actividades que podrían beneficiarse de trabajar en "modo proyecto". Por ejemplo, el diseño y puesta en marcha de nuevos programas de formación, programas de aseguramiento de la calidad, organización de congresos científicos, jornadas de difusión de los resultados de la investigación, etc.

Por otra parte, la proyectificación puede ayudar a las universidades a afrontar los nuevos retos de este siglo XXI. Como a cualquier otra institución, a las universidades se les pide que sean eficientes en el uso de sus recursos y que obtengan resultados en sus funciones de docencia, investigación y de transferencias de conocimiento.

En las últimas décadas, el entorno académico se ha vuelto mucho más competitivo, aumentando la complejidad de las actividades realizadas. Algunas de las causas son las siguientes:

—Creación de muchas nuevas universidades, lo que contribuye a aumentar la competencia entre las mismas por conseguir nuevos estudiantes, y mantener los existentes.

—Demanda de un mayor grado de internacionalización, en el contexto de un mundo más globalizado.

—En relación con los dos puntos anteriores, necesidad de aparecer en buenas posiciones dentro de los rankings de universidades, como el de Shanghai o el QS.

—Crecimiento de la proporción de actividades académicas que son financiadas por las administraciones públicas mediante proyectos en convocatorias competitivas: proyectos de investigación, de innovación docente, cooperación interuniversitaria, etc.

—Aparición de nuevos métodos docentes: clase invertida, aprendizaje basado en proyectos, etc.

—Explotación de las posibilidades de enseñanzas híbridas que integren presencialidad con virtualidad.

Es por ello que cada vez más, el trabajo de los académicos se gestiona y evalúa utilizando los criterios de las empresas e instituciones con ánimo de lucro y orientadas al mercado (Siekkinen et al., 2020). Asistimos a la paradoja de que, a medida que la autonomía de la universidad como institución ha ido creciendo, la autonomía percibida por los profesores universitarios en el desarrollo de su trabajo ha disminuido (Carvalho & Diogo, 2018).

De hecho, el colectivo universitario está constantemente evaluado a lo largo de su carrera académica. Baste poner por ejemplo el caso español, en el que el trabajo de los académicos se evalúa periódicamente mediante los sexenios de investigación y quinquenios de docencia, y en donde el acceso a cualquier figura de profesorado (Ayudante, Contratado Doctor, Titular, Catedrático) está precedido de la correspondiente acreditación previa por parte de la Agencia Nacional o Autonómica.

La introducción de competencias de dirección de proyectos en el ámbito universitario puede ayudar a la comunidad académica a cumplir con sus objetivos personales, y a la universidad como institución a gestionar mejor esta creciente complejidad, dando respuesta a las demandas de eficiencia y efectividad que la sociedad requiere. Pero la proyectificación no solo implica introducir metodologías y estándares en dirección de proyectos, sino también acometer los cambios culturales y organizativos que apoyen todo el proceso, cambios que suelen requerir periodos de adaptación suficientes, para que la universidad no pierda sus valores ancestrales de excelencia, flexibilidad y autonomía.

En este capítulo vamos a abordar cuestiones relacionadas con la proyectificación en cada una de las funciones de la universidad: docencia, investigación-transferencia y gestión. Dedicaremos un apartado a cada una de ellas, analizando que proyectos contemplan, y abordando cómo la proyectificación puede ayudar a la comunidad académica a ser más eficiente y competitiva.

En la parte de gestión de la universidad como institución, dedicaremos una mención especial al desarrollo e implantación de una Oficina de Dirección de Proyectos universitaria (PMO, *Project Management Office*), estructura organizativa que permite desplegar el plan estratégico de la institución por medio de un conjunto de proyectos. Gran parte de lo que en ese subapartado se aborda está basado en la experiencia del autor como Director de Área de Proyectos y Estrategia de la Universidad de Valladolid, desde donde se comenzaron a desplegar funciones de PMO universitaria.

Dedicaremos un penúltimo apartado a resumir las principales ventajas de la proyectificación en la academia, y a reflexionar sobre los retos y dificultades a superar durante el proceso de proyectificación. Finalizaremos con las conclusiones del capítulo.

2. Proyectificación en la docencia

Las actividades docentes consumen una buena parte de la actividad del académico, y la calidad de estas tiene importantes repercusiones en la formación de los alumnos y en su inserción en el mundo laboral. En muchos casos, la percepción general que la sociedad tiene de la universidad se restringe a la labor de la enseñanza.

En un entorno cada vez más competitivo, con mayor oferta educativa y con disminución del número de alumnos, las universidades tienen que competir por los estudiantes, ofreciendo excelencia en la docencia, y diseñando programas formativos que faciliten la integración en el mundo laboral. Para poder competir en este contexto, se está evaluando la actividad docente con criterios similares a los utilizados por entidades privadas (Siekkinen et al., 2020), marcando objetivos estratégicos y operativos, y utilizando indicadores clave de desempeño que reflejan tasas de abandono, tasas de incorporación laboral, resultados de encuestas, etc.

Este contexto ha conllevado el aumento generalizado de la carga de trabajo (al menos la percibida) de los profesores (Pace et al., 2021), incluyendo un incremento muy importante del trabajo administrativo alrededor de la actividad docente (Tight, 2010). Existe una tendencia a una mayor fragmentación de los tiempos de trabajo para hacer frente a las múltiples actividades (Dollinger, 2020: preparar clases, ejercicios y actividades, clases de apoyo, tutorías, atender a los alumnos, realizar y corregir exámenes, contestar correos electrónicos, proponer mejoras en los temarios, etc. El docente se ha convertido en un gestor de *muchos proyectos pequeños* que se ejecutan en los mismos periodos temporales, y la filosofía que subyace tras la dirección de proyectos puede ayudarle a gestionar mejor su tiempo y su trabajo.

Aparte de esta tendencia a la proyectificación del "trabajo cotidiano", en el ámbito docente existen muchas otras iniciativas que son gestionables como proyectos, por ejemplo:

—La propuesta y elaboración de nuevos programas formativos: grado, máster, doctorado y cursos de extensión universitaria. Incluye los trámites administrativos para su acreditación.

—Programas de formación del profesorado, para mejorar sus competencias docentes.

—Elaboración de cursos no presenciales (*online*).

—Proyectos de movilidad de estudiantes tipo Erasmus y de colaboración docente tipo Erasmus+.

—Proyectos de innovación docente.

—Etc.

La proyectificación favorece la eficiencia al orientar las actividades del profesor hacia la consecución de unos objetivos medibles, que deben conseguirse en un tiempo limitado y con recursos prefijados. Pero debemos alertar de que una

excesiva proyectificación puede conllevar perder la flexibilidad que requiere todo proceso de enseñanza y aprendizaje. En última instancia, los ritmos de las actividades docentes deben adaptarse a las particularidades del estudiante. Una excesiva proyectificación de la docencia puede afectar también al grado de autonomía que los estudiantes tienen para que la enseñanza se adapte a sus intereses concretos.

Por las sinergias entre la dirección de proyectos y las metodologías docentes, merece la pena mencionar en este apartado el denominado "Aprendizaje Basado en Proyectos (PBL, *Project Based Learning*). Se trata de una metodología de enseñanza centrada en el alumno, que fomenta la autonomía de los estudiantes, la colaboración, la comunicación y el trabajo en equipo, y que permite abordar situaciones similares a las existentes en el mundo real (Kokotsaki et al., 2016).

El uso de estos tipos de innovaciones docentes se ve favorecido por el despliegue de las TIC en general, y de internet en particular, dado que permiten que la capacidad de acceso a la información por parte de los alumnos sea prácticamente ilimitada. Esto está produciendo cambios muy significativos en el proceso de enseñanza y aprendizaje: se reduce el papel del profesor como "*nodo de conocimiento*", a cambio de aumentar su rol como "*coach*" que acompaña al alumno en su proceso de aprendizaje.

PBL permite que los alumnos se involucren en verdaderos proyectos en los que se entregan productos o servicios reales (Guo et al., 2020). Se trata de una metodología que utiliza el concepto de proyecto para fomentar la adquisición de conocimientos y competencias. Por tanto, PBL y dirección de proyectos se benefician mutuamente.

Por una parte, conocer aspectos metodológicos de dirección de proyectos puede mejorar el rendimiento y la eficiencia de los estudiantes en iniciativas PBL. Rooij (2009) muestra como el conocimiento previo del PMBOK (PMI, 2021) facilita la interacción entre los equipos de trabajo, y mejora el espíritu de colaboración en actividades, y Fioravanti et al. (2018) integran la enseñanza de gestión de proyectos de ingeniería del software con PBL. Estos y otros trabajos similares aconsejan introducir al menos algunos conocimientos simples sobre metodologías en dirección de proyectos al comienzo de las iniciativas docentes que utilicen PBL, ya que de esta forma los estudiantes podrán abordar su proyecto estando familiarizados con aspectos tales como gestionar tiempos, alcance, riesgos o partes interesadas.

Por otro lado, la PBL se ha utilizado con éxito para mejorar las competencias en dirección de proyectos en distintos programas universitarios. Por ejemplo, De Los Ríos-Carmenado et al., (2015) utilizan un esquema de enseñanza basado en PBL para ayudar a los estudiantes a desarrollar las competencias en dirección de proyectos del *International Project Management Association* (IPMA) en alumnos universitarios de grado y master; Torres et al. (2019)se centran en proyectos de construcción, Arantes do Amaral et al. (2015) lo han utilizado para la enseñanza

en proyectos de cooperación de organizaciones no gubernamentales y Jaime et al. (2016) en proyectos de software.

3. Proyectificación en la investigación y transferencia

La investigación constituye una de las misiones más importantes de la universidad en su función como generadora de conocimiento. Una buena investigación es una condición necesaria, aunque no suficiente, para una buena transferencia que contribuya a poner en valor económico los resultados de la investigación. Adicionalmente, la investigación sienta las bases para poder enseñar a los estudiantes los últimos desarrollos tecnológicos, contribuyendo a crear mejores profesionales. Por ello, es totalmente relevante plantearse en qué medida el enfoque basado en proyectos y las metodologías de gestión de proyectos pueden contribuir a una mejor investigación.

En este apartado caracterizamos a los proyectos de investigación y desarrollo realizados en el ámbito universitario, así como los proyectos de transferencia, realizados fundamentalmente a través de proyectos de colaboración con empresas. Dedicamos un subapartado específico para las habitualmente denominadas "Oficinas de Proyectos Europeos", que se encargan de dar soporte a los investigadores en distintas fases de los proyectos, como la búsqueda de socios o la redacción de las propuestas. No debe confundirse esta estructura con las Oficinas de Dirección de Proyectos (PMO) que comentaremos en el apartado dedicado a la proyectificación de la gestión universitaria.

3.1. *Caracterización de los proyectos de I+D de las universidades*

Los proyectos de investigación universitarios tienen características específicas que les hacen más complejos que otros tipos de proyectos.

A diferencia de la mayoría de los proyectos realizados en empresas privadas, en los que la financiación se acomete mediante fondos propios y deuda, en las universidades la financiación proviene fundamentalmente de fondos públicos, obtenidos en convocatorias regionales, nacionales y europeas, o bien bajo convenios y contratos con instituciones privadas (los regulados por el artículo 83 de la Ley Orgánica de Universidades (LOU) en España).

Se trata de proyectos de alto riesgo, dado que, por su propia naturaleza, se sitúan en la frontera del conocimiento científico y tecnológico. Por ello, a diferencia de lo que ocurre con muchos proyectos empresariales aplicados, los objetivos de estos pueden ser más abstractos y sujetos a cambios imprevistos durante la ejecución (Huljenić et al., 2005).

Muchos de estos proyectos son realizados por consorcios en los participan socios de distintas instituciones, universidades, empresas y otras organizaciones, cada una con sus propios objetivos e intereses. Adicionalmente, la implicación

en el proyecto suele ser a tiempo parcial, es decir, los profesores e investigadores universitarios comparten sus labores en el proyecto con sus actividades docentes y con la participación en otros proyectos de investigación o innovación docente. Y en muchos proyectos, los equipos combinan a unos pocos investigadores *seniors* con un mayor número de investigadores *juniors*, muchos de ellos realizando sus tesis doctorales, y sin una relación contractual estable aún con su institución (Riol & Thuillier, 2015).

Además, por las propias características de las convocatorias públicas, existe una marcada rigidez en cuanto a plazos y costes:

—La fecha límite de entrega de la propuesta es inaplazable, y en muchos casos, el tiempo entre la publicación de la convocatoria y el "*deadline*" es muy reducido, provocando una gran presión en los grupos de investigación.

—La fecha de finalización del proyecto y de su justificación administrativa no puede tampoco superarse, salvo en contadas convocatorias, siempre que esté suficientemente justificada.

—Los costes no pueden superar en ningún caso a los consignados en la propuesta y, en su caso, negociados con la entidad financiadora. No existe posibilidad de sobrecostes.

—Existencia de reglas rigurosas que afectan a la elegibilidad de las partidas de costes, así como a su distribución.

—Consecuencia de lo anterior, son proyectos con alta exigencia de informes administrativos minuciosos.

En definitiva, son proyectos complejos muy difíciles de gestionar. Una dirección de proyectos profesional puede ayudar a los investigadores, sensibilizándoles acerca del papel de la gestión de riesgos, en la gestión de partes interesadas en aquellos proyectos que implican varios socios, así como en aspectos relacionados con la redacción de propuestas de proyectos e informes de progreso.

La introducción de metodologías de dirección de proyectos a lo largo de todo el ciclo de vida de un proyecto de I+D permite integrar una nueva perspectiva que complementa a las labores tradicionales de "*dirección científica*". Mientras que, como su nombre indica, esta última se centra en la *excelencia* en las decisiones científico-técnicas, la dirección de proyectos se centra en la consecución eficiente de los objetivos y del alcance final, dentro una serie de restricciones de tiempo y recursos.

Las ventajas de combinar estos 2 roles se hacen evidente en las organizaciones matriciales, en las que conviven directores funcionales (directores de especialidades científicas en el caso de proyectos de I+D) con los directores de proyecto. Aunque la heterogeneidad de objetivos puede dar lugar a conflictos, el equilibrio entre ambas visiones contribuye a mejorar el resultado final de los proyectos (Cleland (1968); Katz & Allen (1985).

No estamos sugiriendo explícitamente aquí que los proyectos de I+D universitarios necesariamente tengan que incluir un director científico y un director de proyecto diferentes, sino que es aconsejable que ambas *formas de pensar* estén presentes dentro del proyecto. No obstante, esta encarnación de roles en personas distintas puede ser adecuada para proyectos de gran envergadura o muy complejos, o bien cuando la entidad convocante lo valore positivamente para conceder la financiación

3.2. *Proyectos de transferencia con colaboración con empresas*

Una mención especial merece el caso de los proyectos de transferencia ejecutados en colaboración por una universidad (o varias) y empresas privadas. Esta colaboración es crucial para mejorar la competitividad de los países y las regiones. Sin embargo, numerosos trabajos indican que existen "barreras culturales" que frenan el desarrollo de proyectos conjuntos, entre otras:

—Diferentes formas de entender la eficiencia
—Heterogeneidad de prioridades e incentivos.
—Diferente concepto de "plazo".
—Falta de doctores con competencias de investigación en las empresas (Lopez-Paredes et al., 2009).
—Conflictos por la propiedad intelectual e industrial de los resultados de la investigación.
—Etc.

Por la relevancia del tema, existen numerosos trabajos académicos que abordan factores de éxito en la colaboración entre universidad y empresa (ver, por ejemplo, Awasthy et al. (2020); Brocke & Lippe (2015) o Pertuzé et al. (2010)). Hay consenso en que es necesario contar con profesionales que conozcan ambos mundos, que tengan competencias de gestión y emprendedoras, y acostumbrados a generar redes de relaciones (*networking*). También puede ser un factor decisivo "alinear" los procesos administrativos de ambas instituciones, de forma que "*rellenar papeles*" sea realmente un medio que favorezca los resultados de la investigación conjunta, en lugar de una fuente de conflictos.

Barnes et al. (2006) sugieren que puede reducirse la "*brecha cultural*" entre empresa y universidad mediante una buena gestión de los proyectos. Problemas típicos como conflictos de plazos o la elección de socios y responsables, pueden ser analizados a la luz de los estándares y metodologías en dirección de proyectos.

Más allá de este y otros trabajos, merece la pena destacar que la aproximación a proyectos permite centrarse en los objetivos finales, en el cuándo, cómo y por quién: pensar en entregables, plazo, costes y responsables, ayuda a que profesionales de distintas culturas organizativas puedan trabajar juntos de forma eficiente. En

otras palabras, la dirección de proyectos permite utilizar un lenguaje y unas metodologías comunes que pueden servir de puentes para superar las brechas entre las distintas culturas organizativas.

3.3. *Apoyo a la investigación: Oficinas de Proyectos Europeos*

La complejidad de los proyectos financiados por la Comisión Europea ha crecido a lo largo de los diferentes Programas Marcos, y sobre todo en los últimos Horizonte 2020 y Horizonte Europa. Se fomenta la participación a través de la formación de grandes consorcios, que integran muchas empresas, centros tecnológicos y universidades. Pueden ser proyectos con presupuestos totales de varios millones de euros, en los que se piden resultados tangibles en temáticas relacionadas con las prioridades de la Comisión Europea (*Clusters*). Estos proyectos requieren un alto grado de profesionalización, de conocimientos genéricos en dirección de proyectos, y también específicos sobre las características de las convocatorias y el funcionamiento de la "maquinaria de Bruselas".

Por ello, en muchas universidades, bien sea directamente o bien a través de entidades asociadas, como Fundaciones Generales o Parques Científicos, existe una estructura organizativa que apoya a los investigadores en todo lo relativo a su participación en proyectos europeos. Estas estructuras organizativas reciben distintos nombres como "Oficina de Proyectos Europeos", "Departamento Técnico de Apoyo a Proyectos Europeos", etc. Aunque inicialmente se concibieron como estructuras de apoyo a los proyectos de investigación, su éxito ha hecho que sus funciones se hayan extendido a otros tipos de proyectos europeos (Erasmus+, becas Marie Sklodowska-Curie, Interreg, etc.), así como a proyectos de convocatorias nacionales y regionales (aunque se conserve término "europeo").

La mayoría de estas oficinas prestan varios de estos servicios:

—Asistencia para orientar el proyecto y focalizarse en convocatorias alineadas con las actividades de investigación propias del grupo o instituto.
—Ayuda en la búsqueda de socios para proyectos.
—Asesoramiento en la redacción de la propuesta. Revisión final de la misma.
—Negociación, si es el caso, con los *project officers* de la Comisión.
—Firmas de contratos. Asesoría sobre cuestiones relacionadas con la propiedad intelectual e industrial.
—Soporte en las actividades de gestión.
—Soporte en la organización de reuniones, congresos y actividades de difusión.
—Apoyo en labores administrativas, realización de informes, cobros y pagos, etc.

La especialización en estas labores y la experiencia en la elaboración de propuestas se ha traducido en un mayor porcentaje de éxito y captación de fondos.

La mayor complejidad de las convocatorias europeas requiere de la participación de empresas, centros tecnológicos y asociaciones, así como de una orientación hacia la innovación y la obtención de resultados de impacto. Por ello, estos proyectos, requieren cada vez más de la realización de funciones de gestión de partes interesadas, de desarrollo de negocio, de gestión de la innovación, gestión de compras, etc.; en definitiva, labores asociadas a una dirección profesional de proyectos, que exceden la tradicional dirección científica "*pura*", que caracterizaba a los primeros Programas Marco.

Existen casos en la literatura que reportan el funcionamiento de este tipo de estructuras organizativas para gestionar proyectos internacionales, en algunos casos como germen de una PMO general de la universidad (Wedekind & Philbin (2018); Fernandes et al. (2021) o Philbin (2018).

4. Proyectificación en la gestión de la universidad

La gestión tanto estratégica como operativa de las instituciones de educación superior requiere de la realización de multitud de actuaciones. Muchas de ellas son claramente proyectos y como tales son abordados. Por ejemplo, todo lo relacionado con la gestión de infraestructuras, obras en edificios, construcción de nuevas instalaciones, etc. Otro caso típico es el de las Tecnologías de Información y Comunicaciones, sobre todo en lo concerniente al desarrollo y adaptación de nuevas aplicaciones software para el apoyo administrativo a la docencia y la investigación.

Pero existen muchas otras iniciativas relacionadas con la gestión fácilmente proyectizables, dado que cuentan con un objetivo singular claro (entregables), tienen principio y final, y su ejecución está sometida a restricciones económicas o de recursos. Algunos ejemplos pueden ser:

—Implantación de sistemas de aseguramiento de la calidad.
—Iniciativas para mejorar la prevención de riesgos laborales.
—Programas de internacionalización.
—Elaboración de planes estratégicos, tanto a nivel de universidad como de escuelas y facultades.
—Etc.

En este contexto cobra sentido impulsar la incorporación de metodologías y estándares que contribuyan a mejorar las competencias de la universidad a la hora de gestionar estos y otros proyectos.

El diseño e implementación de una estrategia clara por parte de las universidades constituye un factor decisivo en el éxito de las mismas (Shattock (2000); Stukalina (2014); Yureva et al. (2016). Por ello, las instituciones de educación

superior deberían acometer proyectos que sirviesen para desplegar la estrategia universitaria, es decir, realizar labores de gestión de carteras de proyectos.

Juntando ambas ideas (mejorar las competencias en dirección de proyectos e implementar carteras de proyectos que desplieguen la estrategia) nos lleva a sugerir que las universidades incorporen estructuras organizativas que desarrollen algunas de las labores típicas de las Oficinas de Dirección de Proyectos (PMO, *Project Management Office*) o también denominadas Centros de Excelencia en Dirección de Proyectos (CoEPM, *Center of Excellence in Project Management*), similares a las que tienen muchas empresas y administraciones.

No englobamos aquí a estructuras organizativas como las Oficinas de Proyectos Europeos tratadas en un apartado anterior, pues normalmente restringen su actuación a la búsqueda de socios y elaboración de las propuestas, sin asumir labores directas de dirección del proyecto durante su ejecución, ni tampoco funciones de gestión de carteras (elección y priorización de proyectos, despliegue de estrategias, etc.).

Pero, en la práctica ¿existen PMOs en las universidades, ya sea como estructura organizativa formal o como grupo de personas que realizan algunas de sus funciones?

No hemos encontrado al respecto literatura suficientemente amplia, pero siempre es posible indagar directamente en las páginas *web* de las universidades. Esta búsqueda, no exenta de cierto grado de informalidad, nos ha llevado a entender que:

—Algunas de las universidades consideradas por consenso de alto prestigio como Harvard o Stanford tienen PMOs.
—Las PMOs son más comunes en el ámbito anglosajón, por lo que una gran parte de las universidades con este tipo de estructuras están en Estados Unidos, Gran Bretaña y Canadá.
—Muchas PMOs están circunscritas a áreas o departamentos específicos, en la mayoría de los casos al de las tecnologías de información y comunicaciones (TIC).
—Dentro de las PMOs con una vocación global (no solo TIC), la función más destacada es la de selección de proyectos estratégicos, seguida de las labores de apoyo a la gestión mediante la introducción de metodologías en dirección de proyectos.

Fuera del ámbito anglosajón, es menos común encontrar este tipo de estructuras. En un estudio sobre las universidades brasileñas, Oliveira et al. (2017) muestran que la mayoría de las universidades carecen de PMO, y las que las tienen, suelen estar circunscritas a áreas concretas de ingeniería o de informática.

En este capítulo sugerimos que una PMO puede mejorar la gestión universitaria, contribuyendo a un mejor despliegue de la estrategia de la institución y me-

jorando la eficiencia con la que se gestionan los proyectos. Igualmente, postulamos algunas ideas acerca de su implementación. Algunas de estas reflexiones están basadas en las experiencias del autor como Director de Área de Proyectos y Estrategia de la Universidad de Valladolid, durante los años 2017 y 2018; consecuentemente, el lector debe ser consciente del riesgo de sesgo de algunas de las afirmaciones.

Dependiendo del Vicerrectorado de Planificación Estratégica y Calidad, el objetivo de la Dirección de Área de Proyectos y Estrategia era mejorar las competencias en dirección de proyectos de la institución, con el objetivo último de contribuir a un mejor despliegue e implementación de la estrategia de la universidad. Más que desarrollar formalmente una PMO, se trataba de crear un "germen" de la misma, comenzando por desarrollar algunas de las funciones típicas de este tipo de estructuras organizativas: despliegue de la estrategia a través de carteras de proyectos, establecimiento de prioridades en la ejecución de proyectos, coordinación de recursos, e introducción progresiva de metodologías en dirección de proyectos.

Se trataba de una PMO general, para dar servicio a todas las áreas estratégicas de la universidad, pero en la práctica, el mayor porcentaje de proyectos que se beneficiaron de las actuaciones estaban relacionados con las tecnologías de información y comunicaciones. De hecho, el despacho de la Dirección de Área se encontraba físicamente en el edificio del STIC (Servicio de las TIC), en lugar de en la ubicación habitual donde se situaban otras direcciones de área, más cerca del edificio central del Rectorado.

4.1. *Concepto y funciones de una PMO*

Una PMO universitaria comparte casi todas las características de las PMOs de cualquier otro tipo de organización como empresas o administraciones públicas.

La séptima edición del PMBOK (*Project Management Body of Knowledge*) define PMO como "*una estructura de gestión que estandariza los procesos de gobernanza relacionados con los proyectos, y facilita compartir el intercambio de recursos, herramientas, metodologías y técnicas*" (PMI, 2021).

Existen numerosos tipos PMOs atendiendo a las diferentes funciones que realizan. Estas funciones van desde el simple apoyo y asesoramiento a los directores y directoras de proyecto, hasta labores de gestión de carteras y de alineación de la estrategia corporativa con los proyectos, pasando por iniciativas de formación, o la misma dirección ejecutiva de los proyectos. Basados en encuestas realizadas a más de 500 PMOs, Hobbs, (2007) reportó hasta 27 tipos de funciones agrupables en 5 grupos funcionales: monitorización y control del proyecto; desarrollo de competencias y metodologías en dirección de proyectos; gestión multi-proyecto; gestión estratégica; y aprendizaje organizacional.

Una PMO puede ser una estructura formal o informal, en el sentido en que puede existir como tal dentro del organigrama, o bien existir un departamento o

sección que realice, en muchos casos a tiempo parcial, algunas de las funciones típicas de una PMO (Artto et al., 2011). También puede dar servicio a toda la organización o concentrarse en un área específica de la misma.

Uno de los objetivos comunes a casi todas las PMOs es mejorar las competencias organizativas de las áreas de la organización que realizan proyectos, promoviendo la utilización de metodologías y estándares. Esto se traduce en una mejor eficiencia en la realización de estos, con mejor cumplimiento de plazos, costes y alcance. Ello implica no solo promover iniciativas de formación, sino apoyar al personal dedicado a proyectos durante todo el ciclo de vida de los mismos.

Los proyectos son estructuras organizativas temporales (European Commission, 2021), por lo que una PMO sirve de nexo entre la organización permanente y las organizaciones temporales. Este hecho conlleva que la PMO pueda acometer funciones muy relevantes para una organización involucrada en proyectos. En primer lugar, la PMO puede servir de repositorio de lecciones aprendidas en proyectos anteriores, procesando errores y buenas prácticas, e incorporándolas en los activos metodológicos de la organización. En este sentido, las PMO pueden jugar un papel relevante en la gestión y mantenimiento del conocimiento de la empresa, no solo para su utilización en otros proyectos sino también para el resto de la organización permanente (Cunha et al., 2014) actuando como un verdadero *broker* de conocimiento (Pemsel & Wiewiora, 2013).

También gracias a este carácter de nexo entre lo permanente y lo temporal, las PMOs pueden contribuir a un mejor seguimiento de las carreras profesionales de las personas cuya actividad está ligada fundamentalmente a proyectos, para quienes los continuos cambios de "jefe o jefa" cuando finaliza un proyecto, dificulta un seguimiento continuado de su desarrollo profesional.

Una PMO avanzada realiza labores de gestión de carteras de proyectos, traduciendo la estrategia organizacional en un conjunto de proyectos, asignando y optimizando recursos, y estableciendo prioridades entre los proyectos.

4.2. *Despliegue de una PMO universitaria*

Lógicamente, es de esperar que cuanto mayor sea el alcance de una PMO universitaria, mejor será el conjunto de servicios que puede proveer. Pero entendemos que, en una primera fase, se deben abordar dos primeros objetivos interrelacionados: mejorar las competencias en dirección de proyectos, y realizar labores de gestión de carteras que liguen la estrategia de la universidad con los proyectos que realiza. En el esquema de Hobbs (2007) aludido anteriormente, se corresponde con las funcionalidades de desarrollo de competencias-metodologías y de gestión estratégica. Evidentemente, se pueden abordar otras funcionalidades posteriormente, dado que el proceso de crecimiento en la madurez organizacional en dirección de proyectos debe ser continuo. Pero entendemos también que estos dos objetivos

iniciales suponen una mejora sustancial de las competencias organizacionales, con respecto a la situación inicial de la mayoría de las universidades.

Ello implica actuar simultáneamente, con un enfoque doble:

—De arriba abajo (*top-down*): partiendo de la estrategia de la universidad, se debe implicar al equipo rectoral y a la dirección de departamentos de administración y servicios, pues es a este nivel en donde se tomarán decisiones relacionadas con los proyectos a realizar, prioridades en caso de restricciones de recursos, etc.

— De abajo a arriba (*bottom-up*): promocionar activamente entre los directores y directoras de proyecto las ventajas de adoptar metodologías y estándares en dirección de proyectos.

El establecimiento de una PMO universitaria debe plantearse como un proyecto en sí, definiendo objetivos, alcance, plazos, costes, partes interesadas, riesgos, etc. La decisión de llevar a cabo el proyecto debe ser tomada al máximo nivel rectoral, pues un factor clave de su éxito es el apoyo de la institución durante todo el proceso de creación de la PMO, así como durante su funcionamiento una vez operativa.

Actuación Top-down. De la estrategia universitaria a los proyectos

El planteamiento *top-down* presupone que la universidad tiene un plan estratégico actualizado y convenientemente aprobado por su Consejo de Gobierno. Puede ocurrir que no exista tal plan de forma explícita, pero en la práctica, la gran mayoría de las universidades cuentan con "*líneas estratégicas de actuación*" que afectan a los principales vicerrectorados. En cualquiera de los casos, es importante que los planteamientos estratégicos estén consensuados y hayan sido objeto de algún tipo de aprobación formal por algún órgano de gobierno de la institución.

Como en cualquier otro proyecto, es importante redactar un caso de negocio (*business case*) en donde se justifica la idoneidad de crear una PMO, especificando su necesidad y los beneficios que se esperan obtener. Pero en el caso de una institución pública compleja como la universidad, con multitud áreas de gestión e intereses, este documento tiene también las funciones de *dar publicidad de lo que se quiere hacer y convencer* a los distintos vicerrectorados y direcciones administrativas de las ventajas que proporcionará la creación de la PMO. En general, un factor de éxito para una PMO es que el resto de la organización conozca su existencia (Hobbs et al., 2008), y en el caso organizaciones grandes como una universidad, esto implica hacer un esfuerzo importante para que su existencia y los servicios que presta sean conocidos por todas la áreas de gestión.

Por ello, una vez que la decisión de implantar una PMO es firme, es conveniente organizar reuniones individuales con distintos responsables de área (vicerrectorados, direcciones de servicio, departamentos, etc.) pues estos van a ser partes

interesadas, de forma que una actitud reticente o negativa ante la PMO puede condicionar su éxito. Esto es así, porque entre las labores principales de la PMO universitaria, tal como la estamos planteando aquí, están algunas tan sensibles como dictaminar qué proyectos se realizarán, cuáles de ellos tendrán prioridad en tiempo y recursos, qué recursos deberán ser compartidos, quién liderará qué proyectos, etc.

Como afirmaban Hobbs et al. (2008), estas funciones tienen una componente relacionada con la "*política y corrientes de poder*". Por ello, en el caso de instituciones como las universidades, tradicionalmente menos jerarquizadas que las empresas privadas, el liderazgo para la implantación de la PMO debe estar basado en el logro de consensos, y en convencer a todas las partes interesadas de que la PMO no supone una pérdida de poder o influencia, sino un modo de canalizar los intereses para conseguir óptimos globales para la institución.

Cuando se cuenta con el consenso y apoyo de este primer nivel de decisión universitario, es conveniente organizar algún acto conjunto de difusión, en el que ahora asistan también responsables de las distintas áreas de gestión de la universidad.

Una vez conseguido el apoyo de todas estas partes interesadas tan relevantes, el resto de la implantación de la PMO es fácil, pues se trata abordar cuestiones más técnicas, comunes a cualquier PMO, existiendo abundante bibliografía al respecto (ver por ejemplo, Rad & Levin, (2002); Taylor & Mead (2016); Hill (2007); Crawford (2010)).

En cualquier caso, una vez creada, el funcionamiento a lo largo del tiempo de la PMO va a seguir requiriendo de un perfil de gestión orientado al consenso, pues van a producirse con toda probabilidad, conflictos de interés por la gestión de prioridades, utilización de recursos, etc. También pueden producirse tensiones porque la PMO puede tratar de uniformizar ciertos aspectos en la concepción y en la gestión de los proyectos, lo que muchas veces puede implicar cambios en la forma de trabajar y de relacionarse entre las personas de distintos departamentos.

Actuación Bottom-up. Mejorando las competencias en dirección de proyectos

Este grupo de actuaciones tiene como objetivo introducir estándares y metodologías en dirección de proyectos dentro de las distintas áreas de gestión de la universidad, sobre todo sobre aquellas en las que se van a desarrollar los proyectos de mayor carácter estratégico.

En general, el nivel de conocimientos sobre dirección de proyectos en las universidades no difiere del que existe en otros tipos organizaciones, tanto públicas como privadas. A excepción de sectores específicos en donde hay una especial sensibilidad hacia la excelencia en dirección de proyectos, el resto de los sectores muestran gran heterogeneidad en la adopción de estas metodologías. Así lo indican distintos trabajos como Golini et al. (2015) para proyectos de cooperación inter-

nacional al desarrollo, Garcia Escribano et al. (2022) para proyectos industriales en PYMES, Crawford & Helm (2009) en organizaciones del sector público, etc. Por ello, todo intento de incrementar la eficiencia a través de la proyectificación pasa por mejorar las competencias en dirección de proyectos de todo el personal; también en las universidades.

Como ocurre en muchos ámbitos técnicos, una prueba piloto que afecte a un número reducido de proyectos puede ser un buen comienzo. Una primera opción puede ser seleccionar un grupo de proyectos con alta componente estratégica, pero con complejidad moderada, y dentro de éstos, escoger aquellos en los que sus directores o directoras tengan cierta predisposición para abrazar nuevos retos y aprender nuevas formas de hacer las cosas.

Es necesario explicarles en qué consiste la prueba piloto, compartir conceptos básicos de dirección de proyectos, y explicar que la introducción de metodologías va a ayudar a gestionar mejor los proyectos y a tener menos problemas durante su ejecución.

Se puede optar por una formación específica si así se considera necesario, pero lo más probable es que las personas involucradas tengan cierta experiencia gestionando proyectos, por lo que no sea necesaria. En lugar de ello, puede ser más adecuado tener reuniones para sensibilizar sobre aspectos importantes sobre los que reflexionar en cualquier proyecto: definir claramente requisitos y objetivos, identificar partes interesadas y establecer cómo se van a gestionar las comunicaciones, identificar y gestionar riesgos, alcance, recursos, etc.

En estos primeros proyectos piloto es necesario acompañar a su director o directora en la mayor parte del proceso. Por ejemplo, tener una sesión en la que se identifican a las partes interesadas, razonando sobre a qué personas o departamentos les puede afectar el proyecto, con quién puede interferir, qué parte puede no parecer tener *a priori* un papel decisivo, pero es importante informar convenientemente, al menos durante las primeras fases del proyecto. Se deben trazar estrategias de comunicación con cada una de estas partes interesadas. Similares sesiones se pueden tener sobre alcance, riesgos, etc.

El resultado de estas sesiones suele ser muy satisfactorio, y en muchos casos, los implicados hacen comentarios del tipo: "ya entiendo por qué en un proyecto anterior tuvimos este o este otro problema", "estamos teniendo en cuenta muchos aspectos interesantes que antes no habíamos visto", etc.

Es en este momento en el que podemos empezar a introducir plantillas de documentos que facilitan los análisis anteriores, pues ahora se pueden entender como un medio para facilitar el análisis en lugar de verse como una carga administrativa (rellenar papeles).

Es aconsejable incidir inicialmente en aspectos como la gestión de partes interesadas o la gestión de riesgos porque suelen actúan como "quick winners", es decir, permiten una mejora rápida de los proyectos, suscitando una actitud positiva hacia incorporar nuevos elementos metodológicos.

5. Síntesis: oportunidades y retos de la proyectificación

En las últimas décadas, la universidad se ha vuelto mucho más competitiva y compleja. Debe competir por atraer estudiantes, y debe producir innovaciones tecnológicas útiles al entorno socioeconómico. En este capítulo hemos sostenido que, en este nuevo contexto, la proyectificación puede hacer que la universidad pueda ser mucho más eficiente y competitiva en el desarrollo de todas sus funciones.

En la docencia, puede ayudar a los académicos a organizar mejor el conjunto de actividades (heterogéneas) que constituyen la labor docente. En el ámbito personal, la filosofía que subyace tras la dirección de proyectos permite a los profesores *organizarse mejor*, algo especialmente útil en un contexto como el actual, en donde la docencia implica multitud de actividades que se realizan en un mismo periodo de tiempo. Metafóricamente, podríamos argumentar que el docente es un gestor de carteras de muchos pequeños proyectos.

Sin embargo, una excesiva proyectificación de la actividad docente puede afectar a la flexibilidad que requiere el proceso de enseñanza-aprendizaje. En última instancia, el receptor del proceso es el estudiante, y los ritmos de enseñanza (y en parte los contenidos) deben adaptarse, en la medida de lo posible, a sus capacidades e intereses. En esta línea, algunos académicos y directivos de empresas abogan por una educación en la que el estudiante tenga cierto margen para determinar los contenidos y el itinerario de su aprendizaje (Henri et al., 2018).

En la investigación, la incorporación de metodologías de dirección de proyectos permite introducir una dimensión complementaria a la labor tradicional de "*dirección científica*", centrada fundamentalmente en la toma de decisiones científico-técnicas de excelencia. La dirección de proyectos focaliza su atención en los objetivos y alcance del proyecto, en el plazo y en la gestión eficiente de los recursos. El balance entre estos dos puntos de vista enriquece al proyecto, contribuyendo a obtener soluciones más satisfactorias y eficientes.

La proyectificación ayuda redactar mejores propuestas de proyecto para concursar en convocatorias públicas, pues permite mostrar que los investigadores conocen las metodologías y herramientas necesarias para gestionar un proyecto con eficiencia. Y durante su ejecución, ayuda a poner el foco en aspectos críticos como la gestión de riesgos o la gestión de las comunicaciones con los distintos socios que forman el consorcio y que constituyen partes interesadas principales.

Las convocatorias públicas para financiar proyectos de investigación contribuyen a una racionalización de la investigación a través de la inclusión de algunas de las ventajas de la proyectificación. Pero también pueden condicionar qué se investiga y cómo se investiga. Basados en entrevistas en el mundo académico, Franssen et al. (2018) muestran que puede afectar a:

— El avance sustantivo del conocimiento. Proyectos disruptivos o con elementos muy innovadores tienen un alto riesgo y, por lo tanto, el temor a no conseguir

los resultados inhibe a los investigadores a abordarlos. Esto puede tener efectos muy negativos a largo plazo, dificultando avances disruptivos de la ciencia.

—Los temas de investigación financiados, pues deben ser acordes con las convocatorias. Evidentemente, es potestativo del organismo financiador establecer sus prioridades y, de hecho, las convocatorias permiten a las administraciones desplegar sus políticas económicas e industriales. Pero también es cierto que esta menor flexibilidad en cuanto a los temas de investigación puede dejar de financiar temas muy relevantes.

Consecuentemente, las administraciones públicas y las universidades deberían buscar un equilibrio entre la focalización de la investigación a prioridades concretas, y la tradicional flexibilidad y libertad del investigador.

La transferencia de conocimiento y la cooperación entre universidad y empresa son factores clave para el desarrollo económico de las regiones y los países. El lenguaje común que proporcionan los estándares en dirección de proyectos contribuye a reducir la "*brecha cultural*" entre academia y empresa, brecha que supone la principal barrera para la colaboración en proyectos de investigación y transferencia. El lenguaje común de la dirección de proyectos puede ser un punto de encuentro que permita "*trabajar juntos*", cada parte respetando las particularidades de la cultura organizativa de la otra. La dirección de proyectos reduce la complejidad de las interacciones al centrarse en objetivos finales claros, estableciendo cómo se conseguirán, cuándo y por quién. Metafóricamente, podríamos decir que la proyectificación proporciona un lenguaje de *bajo contexto,* en el sentido de la comunicación intercultural de Hall (1976), contribuyendo a reducir los malos entendidos y enfocando a las partes hacia la acción.

En el contexto actual tan competitivo, las universidades deben desplegar estrategias claras que establezcan "dónde ser quiere ir y cómo llegar". Como ocurre con otros tipos de organizaciones, la proyectificación puede ayudar a ejecutar esta estrategia defiendo un conjunto de proyectos que la desplieguen, fijando prioridades, coordinando la ejecución conjunta de los mismos y optimizando recursos. Muchas universidades, principalmente en el contexto anglosajón, cuentan con estructuras organizativas que realizan funciones de Oficina de Dirección de Proyectos o PMO (*Project Management Office*).

El proceso de creación y el funcionamiento de una PMO universitaria no es muy diferente del de la cualquier otra organización. Sin embargo, en una comunidad como la académica, con gran heterogeneidad de actores y unas jerarquías menos marcadas, la implantación de una PMO debe basarse en un liderazgo basado en la búsqueda de consensos. Esto es así, porque la PMO afecta a decisiones muy sensibles, como qué proyectos serán prioritarios, cuándo comenzarán o qué recursos se les asignará. Por ello, es necesario un proceso previo para dar a conocer qué hará la PMO y cuáles serán sus beneficios para toda la universidad.

Una vez resumidos los puntos positivos (y también las advertencias sobre alguno negativo) de la proyectificación en la universidad, cabe reflexionar acerca de cómo la cultura académica actual está alineada con las exigencias de la proyectificación.

En mundo académico es singular por un buen número de razones. Los investigadores y profesores universitarios son personas bien formadas, con titulación de doctorado, y expertos (o en vías de ser expertos, en el caso de investigadores jóvenes) en sus ámbitos científico-técnicos.

La cultura científica premia la excelencia, y más allá de otras motivaciones lógicas, el mundo académico es sensible al reconocimiento por parte de los colegas y la sociedad. El trabajo, fundamentalmente intelectual, requiere de espacio para la creatividad y la flexibilidad, con mentes suficientemente abiertas para poder generar nuevos paradigmas científicos que supongan avances disruptivos. No cabe duda de que esta cultura de excelencia está detrás de los avances tecnológicos y sociales que ha experimentado la humanidad, sobre todo durante los dos últimos siglos, justamente el periodo de mayor desarrollo e implantación de las universidades.

La proyectificación implica un enfoque más ejecutivo, que requiere incorporar en la cultura organizativa una serie de estándares y metodologías de dirección de proyectos. Se trata de una cultura que enfatiza la planificación y el control, los objetivos, plazos, costes, riesgos, partes interesadas, etc. Surge la pregunta, ¿está el mundo académico actual suficientemente familiarizado con estos estándares y metodologías? (evidentemente, exceptuando de la pregunta a los profesores de áreas afines a la dirección de proyectos).

Riol & Thuillier (2015)the literature reports friction between management and research. In this study, we investigate whether and to what extent academic research projects can be managed using classical project management (PM realizaron entrevistas entre académicos involucrados en proyectos para entender en qué medida se utilizaban las metodologías de dirección de proyectos. Concluyeron que no se utilizaban las herramientas y metodologías estándares típicas en la industria porque no eran conscientes de su existencia; en su lugar, los proyectos se ejecutaban de manera informal e intuitiva, aplicando *"conocimiento tácito"*.

En el caso de proyectos de investigación, los documentos de gestión utilizados suelen restringirse a los requeridos por la entidad pública financiadora, como cronogramas de actividades, estructuras de desagregación de tareas, presupuestos e informes de seguimiento del proyecto (Fowler et al., 2015). Y en muchos casos, una vez obtenida la financiación, no se vuelven a utilizar durante la ejecución del proyecto.

Esta falta de formación metodológica no debe sorprender, por cuanto los profesionales que coordinan este tipo de proyectos son expertos en sus ámbitos de conocimiento científico, y a dichos ámbitos han dedicado toda su carrera profesional. Salvo excepciones, la formación recibida en proyectos se ha limitado a

conocer las características de las convocatorias públicas a las que pueden acudir, y los requisitos administrativos de las mismas.

Concluimos, por tanto, que es necesario promover de forma generalizada la formación dirigida a toda la comunidad universitaria, tanto académicos como gestores. Bastaría, en una primera fase, con charlas y talleres que aborden conceptos fundamentales. Por muy simple que fuese esta primera formación, probablemente supondría un gran salto con respecto a la situación actual, y sentaría las bases para posteriores desarrollos. Esta formación debe incidir en los beneficios de la dirección de proyectos, remarcando que el posible mínimo incremento de la carga administrativa (*rellenar documentos*) se compensa con creces con el ahorro de tiempo y con la mayor seguridad de tener éxito en los proyectos.

6. Conclusiones

En este capítulo hemos visto como el mundo académico no es ajeno a la tendencia de proyectificación actual, que afecta a todas las organizaciones y a la sociedad en su conjunto. La proyectificación de las actividades de docencia, investigación y gestión, y la consiguiente introducción de metodologías y estándares en dirección de proyectos, contribuye a mejorar la competitividad de las universidades, de forma que puedan responder mejor a las demandas cada vez más exigentes de la sociedad.

La proyectificación ayuda a los académicos a organizar mejor el gran número de actividades que constituyen su labor docente, a preparar mejores propuestas y a gestionar mejor los proyectos de investigación.

A nivel de gestión, hemos defendido desarrollar estructuras organizativas tipo PMO que traduzcan las estrategias de la universidad en proyectos, fijen prioridades entre los mismos, los doten de recursos y los coordinen conjuntamente. El enfoque de la proyectificación permite materializar la estrategia en resultados tangibles concretos (entregables), con entregas en fechas determinadas y con recursos prefijados.

Como ocurre en cualquier otro tipo de institución, la proyectificación implica cambios culturales dentro de la organización, cambios que requieren de tiempo y paciencia. Y también de acciones de concienciación y formación, con objeto de mejorar las competencias organizativas en dirección de proyectos.

En cualquier caso, los procesos del cambio deben realizarse con el consenso de todas las partes, y los ritmos del cambio deben ser los adecuados para que la academia no pierda sus valores ancestrales de excelencia científica, flexibilidad y autonomía.

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Proyectificación y la Unión Europea

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RESUMEN

El objetivo de este capítulo es profundizar en el fenómeno de la proyectificación de la Unión Europea (UE). El artículo es de carácter conceptual y se basa en los resultados de varios proyectos de investigación realizados por los autores, que representan dos disciplinas: la gestión y las ciencias políticas. En el artículo explicamos qué distingue al proyecto de la UE. Como marco analítico, hemos adoptado tres niveles (micro, meso y macro) a partir de los cuales caracterizamos la proyectificación de la UE. El capítulo termina con un debate sobre los proyectos como herramientas de gobierno y las posibles futuras investigaciones sobre la proyectificación de la UE. Desde una perspectiva general de los resultados, afirmamos que es necesario ir más allá de la tendencia a despolitizar el uso de los proyectos de la UE como herramienta neutral y abrir debates más amplios sobre la política de los proyectos.

Palabras clave: Proyectificación, Unión Europea, proyecto de la UE.

1. INTRODUCCIÓN

La Unión Europea es una organización supranacional formada por 27 países europeos. Actualmente se basa en la noción de mercado único y los Estados miembros desarrollan políticas comunes en ámbitos como el clima, la investigación y la innovación y la migración. Aunque hay ámbitos políticos en los que se desarrollan marcos normativos comunes y vinculantes, también hay otros en los que la UE tiene poca o ninguna jurisdicción formal. En estos ámbitos políticos, que incluyen políticas como la política social, la educación, la inclusión social y el

desarrollo regional, la elaboración de políticas se desarrolla principalmente a través de acuerdos y entendimientos compartidos, y la gobernanza toma forma a través de procesos de coordinación flexible, armonización, normalización, aprendizaje y evaluación comparativa (por ejemplo, Kahn-Nisser 2014; Bernhard 2011). Estos modos no coercitivos de gobernar dependen de la voluntad activa y la participación de los actores nacionales y subnacionales, y una forma importante de incentivarlos, y crear condiciones para las asociaciones locales, es a través de la financiación de proyectos (Carlsson et al 2022; Mukhtar-Landgren & Fred 2018; Bruno, Jacquot, y Mandin 2006). Como resultado, la financiación de proyectos se ha descrito como "una parte integral de la formulación de políticas de la UE durante las últimas dos o tres décadas" (Büttner y Leopold 2016: 41).

Los proyectos comunitarios son uno de los principales instrumentos de aplicación de la política de cohesión de la UE. El objetivo de la política de cohesión es contribuir "a reforzar la cohesión económica, social y territorial en la Unión Europea", lo que incluye equiparar los desequilibrios entre regiones y cumplir las prioridades de la UE en el contexto del crecimiento y el desarrollo (página web, Comisión Europea 2022a). Para el actual periodo de programación (2021-2027), los fondos de la UE asignados a la política de cohesión ascienden a 392.000 millones de euros, que se distribuyen principalmente mediante la financiación de proyectos a través de cuatro fondos (página web de la Comisión Europea, 2022b)[1]. Los expertos en este ámbito han conceptualizado los efectos de la financiación de la UE en términos de un ecosistema creciente con una serie de organizaciones, individuos, agentes y de todas "las categorías profesionales de proyectos" (Kovách y Kučerová, 2006; Büttner y Leopold 2016; Mukhtar-Landgren y Fred, 2018). A raíz de la financiación de la UE, se han desarrollado nuevas profesiones para adquirir, gestionar, ejecutar, evaluar y valorar proyectos financiados por la UE, y difundir las mejores prácticas y los buenos ejemplos de proyectos en toda Europa (Büttner y Leopold 2016). Como consecuencia, la Unión Europea ha sido descrita como uno de los principales lugares y factores de empuje de la proyectificación (Godenhjelm, et al., 2015; Mukhtar-Landgren y Fred, 2018; Büttner y Leopold, 2019; Jałocha, 2019).

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1. El Fondo Europeo de Desarrollo Regional (FEDER) invierte en el desarrollo social y económico de todas las regiones y ciudades de la UE. El Fondo de Cohesión (FC), medio ambiente y transporte en los países menos prósperos de la UE. El Fondo Social Europeo Plus (FSE+), tiene por objeto "apoyar el empleo y crear una sociedad justa y socialmente integradora en los países de la UE". Por último, el Fondo de Transición Justa (FCT) "apoya a las regiones más afectadas por la transición hacia la neutralidad climática" (ref: https://ec.europa.eu/regional_policy/en/funding/available-budget/).

1.1. *Objetivo del capítulo*

En este capítulo intentaremos mostrar la complejidad del fenómeno de la proyectificación de la UE. El capítulo es de carácter conceptual y los autores, representantes de dos disciplinas científicas diferentes (ciencias de la gestión y ciencias políticas), comparten sus reflexiones a partir de la investigación interdisciplinar que llevan a cabo. Para abordar el problema principal que estamos debatiendo —¿qué es la proyectificación de la UE?—, nos basamos en los resultados de nuestras investigaciones anteriores (por ejemplo, Jałocha, 2012; Fred, 2018; 2020; Mukhtar-Landgren, & Fred, 2019; Jałocha, 2019).

Entendemos la proyectificación como un fenómeno complejo, no sólo de naturaleza organizativa. Al considerarla un concepto cultural (Packendorff, Lindgren, 2014), tenemos en cuenta las consecuencias de este fenómeno para los individuos, los grupos y las sociedades. Además, la proyectificación describe una tendencia dentro de la cual las vidas de los individuos, así como las actividades económicas de empresas y organizaciones, experimentan transformaciones constantes (Kalff, 2017). Por lo tanto, tomando su significado amplio, definimos la proyectificación como *la institucionalización de proyectos en la sociedad, en términos del proceso en el que los proyectos se integran en todos los niveles y ámbitos de la sociedad a través de creencias, normas, valores, estructuras y modos de comportamiento* (Jacobsson y Jałocha, 2021). Por lo tanto, suponemos que la proyectificación puede ser tanto un enfoque de gestión como una tendencia social, un estado humano y una cuestión filosófica (Jacobsson y Jałocha, 2021).

Una comprensión más amplia de la proyectificación nos permite ir más allá de la comprensión puramente mecanicista y organizativa de este fenómeno y someterlo a un análisis en diferentes niveles de las estructuras sociales. Por lo tanto, como marco analítico para nuestras consideraciones, hemos adoptado una tipología comúnmente utilizada de tres niveles en los que se puede observar el fenómeno de la proyectificación de la UE. Los niveles —micro, meso, macro— se utilizan para comprender los tipos de comportamiento que se producen en los distintos niveles y las interconexiones entre estos. Los niveles son analíticos e ideales-típicos, lo que significa que la proyectificación de la UE se considera un fenómeno que impregna varios niveles de la vida social y organizativa, aunque es posible discernir ciertos elementos característicos en cada nivel por separado. Nuestra ambición es caracterizar la proyectificación de la UE en los niveles micro, meso y macro y cómo se interrelacionan entre sí. *El nivel micro* se refiere a lo que ocurre en términos de proyectificación de la UE a individuos o grupos de individuos. *El nivel meso* tiene a la organización como unidad de análisis y se centra en cómo se transforman o adaptan las organizaciones debido a los proyectos de la UE. *El nivel macro* adopta una perspectiva global y se centra en sistemas completos y en las relaciones entre distintas organizaciones o Estados miembros y en cómo facilitan estas organiza-

ciones los sistemas de financiación de proyectos y los proyectos financiados por la UE. En la práctica, los niveles están interrelacionados, de modo que los cambios en la formulación de las políticas públicas o la organización de los mecanismos de financiación a nivel macro pueden tener consecuencias para los funcionarios que trabajan en proyectos financiados por la UE (a nivel micro).

El capítulo está organizado como sigue. En primer lugar, analizamos qué es un proyecto de la UE y en qué se diferencia de la concepción tradicional del proyecto como método de gestión. Aquí también desarrollamos la noción de proyecto de la UE como instrumento político utilizado para poner en práctica los objetivos de la UE. A continuación, analizamos la proyectificación de la UE basándonos en los tres niveles analíticos de observación. En esta sección, mostramos ejemplos de proyectificación de la UE principalmente de Polonia, Suecia y Finlandia. El capítulo finaliza con un resumen y una reflexión sobre los proyectos de la UE como vehículos para el desarrollo de las distintas políticas de la unión.

2. ¿Qué es un «proyecto-UE»?

Tanto en los debates académicos como en la formulación de políticas, los proyectos de la UE se entienden de forma más amplia que la que figura en la definición de los manuales de gestión de proyectos (por ejemplo, PMBoK, Prince2, PM²). Cuando se utiliza el término "proyecto de la UE", puede referirse a diversas formas de actividades, no necesariamente definidas como proyectos en un sentido más estricto. Godenhjelm (2016:36) afirma incluso que los principios de financiación de la UE refuerzan "la inclinación a definir casi todas las actividades de reforma como proyectos" (véase también Andersson, 2009). Aunque la metodología PM², una metodología oficial de la UE, define un proyecto como "una estructura organizacional temporal establecida para crear un producto o servicio único (entregable) con ciertas restricciones como tiempo, coste y calidad" (Comisión Europea, Dirección General de Informática, 2021, p.5), también se suele hacer referencia a otras formas como las subvenciones, las iniciativas de cofinanciación y las colaboraciones como proyectos. Esto significa que las prácticas de los proyectos en la UE no sólo se aplican a los proyectos típicos (definidos según metodologías de proyecto estrictas), sino también a las actividades de cuasi proyectos. Por consiguiente, cualquier acción puede convertirse en un "proyecto de la UE". En este sentido, es importante reconocer que el proyecto-UE es más que un proyecto acotado, es una forma de gobernanza dentro del objetivo más amplio de la cohesión social en y entre los Estados miembros de la UE.

Gobernanza (en) la UE: el papel de los proyectos-EU

Desde el punto de vista de la gobernanza, el proyecto de la UE puede considerarse un instrumento político utilizado por la Comisión Europea (CE). Los

proyectos de la UE se utilizan para aplicar políticas en ámbitos en los que la UE tiene poca o ninguna jurisdicción formal. En este sentido, los proyectos de la UE pueden considerarse una herramienta de gobierno o un instrumento político. Un instrumento político es una herramienta empleada por los políticos y por los responsables de la elaboración de políticas para aplicar políticas. Los instrumentos políticos suelen dividirse en dos categorías: (1) instrumentos políticos duros, incluidos los instrumentos jurídicos o normativos y los instrumentos fiscales, y (2) instrumentos políticos blandos, como la información, la producción de conocimientos y la organización (Carlsson & Mukhtar-Landgren 2019). La CE utiliza los proyectos y la financiación de proyectos de la UE como instrumento político en ámbitos en los que no tiene mandato legal, como la inclusión social, el desarrollo regional y las políticas culturales. Debido a que la UE no tiene jurisdicción formal en estas áreas, los proyectos y la financiación de proyectos de la UE se convierten en una forma de crear incentivos locales para implementar las políticas de la UE, así como una forma de utilizar la competencia (para la financiación de proyectos) como una forma de aumentar la calidad de los servicios. Como tales, los proyectos de la UE son una forma de incentivar a los actores nacionales y subnacionales para que participen en la consecución de los objetivos de la UE, incluida la formación de asociaciones (Carlsson et al 2022; Mukhtar-Landgren y Fred 2018; Bruno, Jacquot y Mandin 2006).

¿Qué puede decirse de los proyectos de la UE en el contexto general de la gobernanza multinivel de la UE? La política de cohesión y sus fondos se han descrito como el núcleo del sistema multinivel de la UE, basado en redes (Rhodes, 1996; Bache y Chapman 2009). Una práctica fundamental de legitimación es que los fondos se ejecutan en asociaciones y a través de proyectos a diferentes niveles gubernamentales en todos los Estados miembros. Como tales, los proyectos de la UE están estrechamente relacionados con el "principio de asociación", que ha sido una característica fundamental de la formulación de políticas en la UE desde finales de la década de 1980 (Bache 2010; von Bergmann-Winberg, 2010). El fundamento del principio de asociación es que la aplicación debe implicar a los agentes más relevantes en el desarrollo regional de los Estados miembros de la UE (Bache, 2008; Demidov, 2016; Potluka y Liddle, 2014). En consecuencia, una de las características fundamentales de la política de cohesión ha pasado a ser su énfasis en las redes, la ejecución local y las asociaciones. En otras palabras, los proyectos se convierten en un instrumento político delimitado y manejable y en una herramienta para aplicar políticas blandas de forma multinivel y colaborativa. Aunque cada fondo es diferente en contenido y alcance, existe una lógica y una estructura de ejecución establecida de financiación de proyectos que trasciende los diferentes ámbitos políticos (Büttner y Leopold 2016, 49), y que hace que los proyectos de la UE sean configuraciones clave, o incluso características centrales, de la gobernanza multinivel (Mukhtar-Landgren y Fred 2018).

Esta estructura multinivel y basada en la asociación ha sido cuestionada en los debates de ciencias políticas sobre la democracia. Los estudios sobre los Fondos Estructurales han abordado cuestiones como la distribución desigual del poder y la influencia sobre los recursos de los Fondos, sobre todo en lo que respecta a la mayor presencia de expertos y la creciente tecnocratización (véanse, por ejemplo, Davies 2007: 780; Olsson, 2003: 292). Otros han planteado cuestiones sobre la perspicacia y la transparencia en el trabajo de los Fondos Estructurales (Carlsson et al 2022; Hall et al 2009: 533). Por un lado, los esfuerzos de colaboración a todos los niveles están abiertos a agentes de varios sectores. De hecho, el modelo de asociación colaborativa es a menudo un requisito previo para la financiación. Por otro lado, esto significa que los proyectos de la UE también se hacen menos "públicos" e incluso se cierran al ciudadano y a audiencias externas, dejando las cuestiones de la rendición de cuentas y la distribución del poder un tanto esquivas o incluso ocultas. Más allá de las consecuencias más generales en términos de participación democrática y rendición de cuentas, la aplicación de la política de cohesión de la UE a través de asociaciones basadas en proyectos ha tenido varios efectos en los Estados miembros. Actualmente asistimos al desarrollo gradual de nuevos "roles para instituciones y entidades tanto existentes como de nueva creación" (Stephenson 2013, 828), incluyendo nuevas organizaciones, nuevas profesiones con el propósito de aumentar las oportunidades de financiación de la UE, así como de facilitar la colaboración, la coordinación y la creación de redes (cf. Mukhtar-Landgren y Fred 2018; Büttner y Leopold 2016, 42; Sánchez Salgado 2013). En consecuencia, los efectos de la proyectificación de la UE pueden ser considerables.

3. Los niveles micro, meso y macro de la proyectación de la UE

La proyectificación de la UE puede considerarse como un proceso que vincula actividades, recursos y actores, pero que también genera diferentes tipos de cambios a distintos niveles (Jałocha, 2018; Jacobsson y Jałocha, 2018). A nivel micro, la proyectificación de la UE es evidente en las restricciones, pero también en las oportunidades que los proyectos producen para los individuos que participan en (o están sujetos a) ellos. A nivel meso se pueden observar reestructuraciones y cambios de organizaciones tanto públicas como privadas debido a los proyectos de la UE, y a nivel macro estos cambios también constituyen transformaciones en industrias, sectores o ámbitos organizativos enteros, incluida la creación de organizaciones interconectadas de la UE, ya que se adaptan a los procesos de los proyectos de la UE y los facilitan.

3.1. *El nivel macro*

La UE es una fuente importante de actividades de proyectos en los países europeos y cuenta con aproximadamente 350 fondos y programas que financian

iniciativas de proyectos en toda Europa. Más del 60 % de todo el presupuesto de la UE se gestiona a través de diferentes sistemas de financiación de proyectos (Büttner y Leopold, 2016). Los fondos se dividen en ciclos de programación de 5 a 7 años a los que todos los Estados miembros deben adaptarse para recibir financiación (Jałocha, 2021). Sin embargo, no siempre ha sido así. Uno de los primeros fondos de la UE —el Fondo Social Europeo— comenzó con un enfoque retroactivo para compensar proyectos ya existentes, y la comisión "actuaba como un banquero, reembolsando a los Estados miembros la mitad de los costes de formación que implicaba la reinserción laboral de las personas" (Brine, 2002:29). Pero gracias a las reformas de los años setenta y ochenta, incluido el cambio del gasto con carácter retroactivo al apoyo de la financiación de programas, la introducción del principio de asociación y la firma del Acta Única Europea, se puede hablar de una normalización en todos los ámbitos de la elaboración de políticas de la UE y de un avance hacia una situación en la que todos los períodos de programación de los distintos ámbitos políticos se corresponden entre sí (Büttner y Leopold, 2016:11). Partes de este desarrollo se han debatido en la literatura en términos de *europeización* (Börzel y Risse, 2000), un concepto que pretende captar los ajustes de los Estados miembros a la regulación y la política de la UE, así como los procesos de homogeneización entre los Estados miembros (Olsen, 2002). Sin embargo, esta evolución de los periodos de programación correspondientes y la normalización, así como los procesos de homogeneización, son también en muchos aspectos procesos de ajustes en las relaciones con los proyectos de la UE. El paso del reembolso retroactivo a sistemas de financiación de proyectos con periodos de programación -incluida la creación de procedimientos de solicitud y rutinas administrativas para la documentación y la evaluación- son todas ellas consecuencias del proyecto de la UE, que afectan tanto a la organización de la UE como a los Estados miembros y sus organizaciones subnacionales. Para ajustarse al sistema de financiación de proyectos de la UE, cada Estado miembro tiene que crear entidades/organismos organizativos nacionales y/o regionales responsables de la gestión y ejecución de los distintos fondos, todo ello de acuerdo con el principio de asociación. La forma en que esto se organiza en los distintos Estados miembros difiere. En Polonia, por ejemplo, aparte de numerosas organizaciones intermedias que participan en la distribución de los fondos de la UE, existe un ministerio cuyo principal objetivo es gestionar y ejecutar los programas de la UE. En España, han organizado los fondos en función de regiones y organismos regionales ya existentes, mientras que Suecia, por el contrario, optó por crear nuevas regiones y nuevos organismos organizativos (Carlsson, 2019).

La identidad proyectizada del país también se configura en torno a mitos de proyectos cofinanciados por la UE. Estos proyectos son una especie de historia organizativa mimética sobre el éxito de un proyecto que merece la pena repetir, recrear y que además es posible. En Polonia, la Eurocopa 2012 fue un proyec-

to-mito legendario. Este proyecto demostró que todo el país era capaz de movilizar y proyectar temporalmente organismos públicos para llevar a cabo un acontecimiento intrincado y complejo. Para muchos otros países europeos, los grandes acontecimientos culturales, como la Capital Europea de la Cultura, crean historias míticas sobre el éxito de los proyectos de la UE (véase Wåhlin, Kapsali, Näsholm y Blomquist, 2016).

Sin embargo, la proyectificación de la UE no sólo repercute en el estilo de gestión general y en los sistemas organizativos de los Estados miembros, sino también, por supuesto, en el contenido de las políticas. Dado que la política de cohesión y sus diferentes fondos se centran en ámbitos políticos como la sostenibilidad, la integración y el desempleo, estos ámbitos también se convierten en objetivos de la proyectificación. Esto también incluye nuevas formas de formular o enmarcar los problemas políticos, donde las cuestiones relacionadas con la educación, por ejemplo, pueden traducirse en "aprendizaje permanente" y los problemas de desigualdad hablarse en términos de "exclusión social" (cf. Mukhtar-Landgren & Fred 2018).

Munck af Rosenschöld (2019), así como Godenhjelm, (2015) describen cómo se utilizan los proyectos de la UE en Finlandia para gestionar la política medioambiental y las cuestiones de sostenibilidad, y McGlinn (2018) describen el ámbito político del desempleo sueco como un campo muy influenciado por los proyectos de la UE, mientras que Wåhlin, Kapsali, Näsholm y Blomquist (2016) muestran cómo se aplican las políticas culturales a través del programa Capital Europea de la Cultura.

Se trata de ámbitos políticos amplios que implican una gran variedad de iniciativas e influyen en muchas organizaciones, instituciones y ciudadanos de todos los Estados miembros y, como tales, pueden generar transformaciones bastante importantes. La literatura más crítica describe la creciente dependencia de proyectos en ámbitos políticos como el desempleo o la integración como "soluciones a corto plazo para problemas a largo plazo" (Abrahamsson y Agevall, 2010; Öjehag-Pettersson, 2017; Mukhtar-Landgren y Fred, 2018). La financiación disponible en estos ámbitos políticos funciona como un incentivo para que los Estados miembros se centren en estos ámbitos específicos (generando posibles cambios en los objetivos políticos a nivel nacional y subnacional de los Estados miembros) y los organicen a través de proyectos.

3.2. *El nivel meso*

A nivel meso, la proyectificación de la UE conlleva tanto una proliferación de proyectos locales y regionales en toda Europa como la transformación y adaptación de las organizaciones y su entorno. La proliferación de proyectos de la UE se denomina a veces "mushrooming" de proyectos y se ve facilitada por la noción de *mejores prácticas*, un fenómeno común en la UE. Una buena práctica es un proyecto

que se considera exitoso de alguna forma "probada" y se supone que se distribuye a otros contextos de la UE (a través de conferencias, ceremonias de entrega de premios, páginas web y medios de comunicación social). A través de estas buenas prácticas, las ideas de proyectos viajan por toda la UE y se supone que tanto los requisitos organizativos como de financiación ya están "resueltos" o listos para ser utilizados en otros lugares.

Una característica interesante de los mecanismos miméticos que tienen lugar a nivel meso es que tipos muy diferentes de organizaciones se asemejan al adaptarse a los requisitos de los proyectos de la UE. Universidades, hospitales, oficinas y empresas privadas suelen crear unidades dentro de sus estructuras cuya principal tarea es adquirir y gestionar proyectos cofinanciados por la UE. Esta similitud entre organizaciones también facilita la transferencia de buenas prácticas o ideas de proyectos. Sin embargo, como debería ser evidente a estas alturas, la proyectificación de la UE implica algo más que muchos proyectos a nivel meso. También implica distintos tipos de cambios en las estructuras organizativas, los procesos de gestión estratégica y los métodos de trabajo. Esto está estrechamente relacionado con las conclusiones de los estudios de Midlers (1995) sobre cómo Renault pasó de ser un fabricante de automóviles clásico a una organización basada en equipos de proyecto autónomos. Esta transformación exigió adaptaciones en la organización circundante y en sus redes de suministro.

Del mismo modo, una organización de un Estado miembro de la UE puede transformar partes de su estructura (un ámbito político específico o una oferta de servicios) para que sean gestionadas por un proyecto o un sistema de financiación de proyectos en el que varios proyectos ocupen el lugar de las antiguas estructuras "permanentes" (de planes de acción o modelos empresariales) de dicha organización. Sin embargo, esta transformación suele conllevar la adaptación del entorno en el que operan estas organizaciones (y proyectos) (véase Fred, 2019). Un ejemplo de ello es la ya mencionada gobernanza y organización en torno a cuestiones de desempleo que, en muchos aspectos, han transformado varias organizaciones (ONG, proveedores de servicios y agentes públicos) debido a la proyectificación de la UE y han provocado procesos de adaptación en sus entornos (Véase McGlinn, 2018). Una forma específica de transformación que experimentan estas organizaciones es el desarrollo de capacidades. Con el fin de gestionar proyectos de la UE, las organizaciones forman a su personal en gestión de proyectos de la UE, contratan a estrategas de la UE, crean su propio modelo de proyecto o compran uno ya existente, sus economistas y administradores cambian sus rutinas para adaptarse a las solicitudes y proyectos de la UE, y las organizaciones, de forma lenta pero segura, adquieren fluidez con los conceptos, procesos e ideas de la UE (véase Fred, 2018). Se movilizan, podría decirse, para futuras actividades de proyectos de la UE. En relación con esto están los muchos actores de apoyo a proyectos de la UE que encontramos en toda Europa, como oficinas de la UE, especialistas de la UE

o estrategas de la UE en organizaciones públicas u oficinas de proyectos de la UE dentro o entre organizaciones públicas. Se trata de agentes dedicados a la difusión de las posibilidades de financiación de la UE y agentes que encuentran formas de poner en contacto la financiación de la UE con posibles agentes que se inscriban en proyectos de la UE, y son como tales facilitadores de la proyectificación de la UE (Fred & Mukhtar-Landgren, 2019).

3.3. *El nivel micro*

A nivel micro, observamos nuevas funciones profesionales y la aparición del gestor de proyectos públicos que, en muchos aspectos, puede relacionarse con la UE. En los últimos 30 años hemos asistido a un aumento de la demanda, sobre todo en el sector público, de gestores de proyectos o de personas con conocimientos en gestión de proyectos. De ser solo un extra en situaciones de contratación a mediados de los años 80, a finales de 2010 la gestión de proyectos "se percibía como un elemento natural en la organización del trabajo gubernamental" (Löfgren & Poulsen, 2013:75).

En el contexto de los proyectos financiados por la UE y el sector público, a menudo nos encontramos con lo que podríamos denominar líderes de proyecto. Se trata de personas comprometidas que trabajan duro para alcanzar objetivos concretos. Son expertos en conseguir financiación y coordinar el apoyo a su solución: ¡su proyecto! En la literatura más amplia sobre ciencia política encontramos a estas personas conceptualizadas en términos de emprendedores políticos (véase Kingdon, 2011) o activistas internos (Olsson y Hysing, 2012). En términos de proyectificación de la UE, estas personas son actores importantes en la difusión y promoción de las posibilidades de financiación de la UE. Sin embargo, los líderes no están solos. También existe, como se ha ilustrado anteriormente, un grupo emergente de funcionarios de toda Europa que cada vez son mejores en la gestión de proyectos. Gracias a la formación, que también se ofrece como parte de las ayudas de la UE en muchos países, el personal del sector público mejora su cualificación para los proyectos. En palabras de Kovách y Kučerová (2009), estas personas pueden considerarse parte de una evolución social más amplia: el surgimiento de una "categoría de profesionales de proyectos". El énfasis en los proyectos y la demanda de conocimientos especializados y capacidades de gestión locales refuerzan la legitimación de esta categoría, "convirtiéndola así no sólo en una clase de expertos, sino también en una categoría de gestión que forma parte de la ejecución de los programas de proyectos" (Kovách y Kučˇerová, 2006:4, véase también; Fred y Mukhtar-Landgren, 2019). Dado que esta categoría de profesionales suele desempeñar un papel de intermediario entre los responsables de la toma de decisiones y los beneficiarios, sus conocimientos especializados también podrían permitirles influir en la asignación de fondos.

Muchos de los proyectos de la UE son bastante pequeños en cuanto a recursos económicos, por lo que la mayoría de las personas sólo participan a tiempo parcial en ellos. En algunos casos, el empleo a tiempo completo de las personas se articula en torno a varios proyectos, y para las personas en las primeras fases de su carrera, los proyectos de la UE podrían ser una vía de acceso al mercado laboral. Sin embargo, estos contratos (a menudo de corta duración) a veces dificultan la obtención de un empleo más permanente. En Suecia, por ejemplo, un empleo se convierte normalmente en fijo después de dos años debido a la ley sueca de empleo (1982:80). Sin embargo, al vincular a una persona a uno o varios proyectos, el empresario puede "evitar" la titularidad para mantener al empleado durante más de dos años. Las consecuencias de la proyectificación de la UE a nivel individual pueden ser, como tales, empleos de corta duración.

En términos más generales, la investigación (Jałocha, 2021) también indica que la proyectificación puede provocar alteraciones en el equilibrio entre la vida laboral y personal de los empleados del sector público. Además, en algunos países (por ejemplo, Polonia), el trabajo fuera de horario se convierte en una norma oculta a la hora de emprender proyectos en organizaciones públicas. Se espera que los empleados que trabajan en proyectos estén disponibles y listos para empezar a trabajar después del horario laboral estándar, fuera del lugar habitual de trabajo, de forma remota. Con bastante frecuencia, la proyectificación personal también se ve reforzada por las tecnologías utilizadas, que se convierten en una herramienta para comprometer y, a veces, controlar a los trabajadores de proyectos.

4. Conclusiones

Como se muestra en el análisis anterior, la dinámica de los proyectos de la UE ha afectado sustancialmente no solo a la forma en que se implementan las políticas de la UE (cf. Büttner y Leopold 2016), sino también a un desarrollo institucional y organizativo más amplio en los Estados miembros de la UE, incluida la aparición de nuevas funciones (Stephenson 2013, 828) y nuevas formas de conceptualizar las políticas. Aunque la financiación de proyectos depende de la voluntad y la participación activas de los agentes nacionales y subnacionales, los procesos y efectos intencionados y no intencionados de la financiación de proyectos -aquí conceptualizados en términos de proyectificación- van más allá de los objetivos específicos de proyectos delimitados, ya que la proyectificación se desarrolla de diversas maneras en diferentes niveles.

Aunque la distinción entre los niveles micro, meso y macro es puramente analítica, podemos observar una evolución a lo largo del tiempo en todos los niveles. Esta evolución puede expresarse en términos de cambios institucionales, organizativos e individuales, en los que la UE -como organización internacional e intergubernamental multinivel- se ha proyectizado cada vez más. Sin embargo, la

revisión anterior también muestra que los efectos organizativos, de hecho, trascienden los proyectos: los organismos de financiación de proyectos a menudo exigen, o fomentan en gran medida, las asociaciones público-privadas, la colaboración y las redes —evidentes en todo, desde proyectos de investigación hasta el desarrollo de regiones transfronterizas más amplias—. Desde el punto de vista institucional, estos procesos de reestructuración organizativa conllevan cambios en términos de temporalidades en los Estados miembros de la UE. Los Estados, las regiones y los municipios tienen que adaptar sus procesos políticos y sus organizaciones a los periodos de programación, a las convocatorias de financiación y a la necesidad de pensar en ciclos de 1 a 3 años en la aplicación de las políticas. Este "cortoplacismo" forma parte de la esencia misma de los proyectos de la UE y puede afectar a la capacidad de planificación a largo plazo a escala nacional y subnacional (véase Sjöblom, 2009). Varios estudios han cuestionado cómo se abordan los problemas a largo plazo, como la sostenibilidad o la exclusión social, a través de proyectos de la UE y organizaciones temporales similares (véase, por ejemplo, Munck af Rosenschöld 2019; Brorström 2019).

Los proyectos como forma de gestión se perciben como herramientas que dan flexibilidad a las actividades y facilitan el control, lo que permite medir más fácilmente los resultados. Tal percepción de los proyectos ha contribuido a que se conviertan en una forma atractiva de gestión, promovida en los procesos de reforma del sector público en todo el mundo, principalmente bajo la influencia de la nueva gestión pública. La creencia en la ineficacia de las burocracias públicas monopolísticas y, por tanto, en la necesidad de abrirse a las prácticas del sector privado, hizo que los proyectos penetraran imperceptiblemente en todo tipo de organizaciones, incluidas las supranacionales, como la UE. Desde el punto de vista de la gestión, una "variable" clave de la proyectificación es el tiempo. La temporalidad que aportan los proyectos por su duración limitada, su falta de continuidad y su repetición es una interferencia significativa en los procesos habituales, especialmente en el sector público. Contradice la idea de repetición y durabilidad, que ha sido la base de la organización y el funcionamiento durante cientos de años en todo tipo de organizaciones. Aunque es fácil medir el resultado directo de un proyecto de la UE, sus resultados a largo plazo son difíciles de valorar y evaluar. La universalidad del diseño hace que perdamos la posibilidad de planificar y evaluar a largo plazo las actividades ejecutadas, lo que afecta negativamente a los procesos de gestión estratégica.

Más allá de las temporalidades, el abanico de actividades en torno a los proyectos también afecta a los Estados miembros de la UE. Estas actividades incluyen buenas prácticas, herramientas de evaluación y valoración del impacto y métodos para formar y organizar asociaciones. Estas herramientas también se han extendido a los Estados miembros, incluidos los gobiernos locales, que adoptan herramientas similares en sus propias organizaciones. En otras palabras, las organizaciones na-

cionales simplemente adoptan la forma de proyecto en la aplicación de su propia labor política, simplemente porque es una manera de trabajar -y de insertar la competencia- que resulta familiar para muchos municipios y regiones. Además, las organizaciones también crean una capacidad interna para trabajar con proyectos que se imitará en otras partes de la organización (Fred & Mukhtar-Landgren 2022). En este caso, la ejecución de proyectos de la UE no solo implica la evolución de nuevas competencias para los funcionarios de todos los niveles, sino también el desarrollo de nuevos agentes, funciones, especialización y profesiones, que van desde los conocimientos en materia de aplicación, dirección y evaluación de proyectos hasta las empresas de consultoría especializadas en ayudar a los municipios en estas tareas.

Por último, la proyectificación también puede observarse en el contenido de las políticas. Hasta la fecha, la financiación de proyectos impregna la gestión de ámbitos políticos amplios y bien definidos que abarcan desde la integración, la cohesión social, la cultura, la investigación, las cuestiones medioambientales y el desempleo hasta la innovación y el desarrollo regional. En investigaciones anteriores, hemos descrito esto en términos de re-compartimentación, que es un proceso en el que los Estados miembros reformulan sus políticas para adaptarlas a las oportunidades de financiación de la UE (Mukhtar-Landgren & Fred 2018). Esto incluye hablar de "aprendizaje permanente" en lugar de educación, y de "exclusión social" en lugar de desigualdad. Esto es especialmente evidente en los ámbitos políticos que están fuertemente proyectificados, tanto en términos de dependencia de la financiación de la UE como en la imitación del formato de proyecto en la formulación de políticas nacionales. Un ejemplo de ello es el desempleo de larga duración (Dahlstedt 2009) y la integración de los inmigrantes (McGlinn 2018).

En conjunto, puede decirse que la evolución en los niveles macro, meso y micro ha conducido al desarrollo de un "mundo de proyectos" de la UE, un gran ecosistema con muchas organizaciones, individuos, agentes y nuevas "categorías de profesionales de proyectos" (Kovách y Kučerová, 2006; Mukhtar-Landgren y Fred, 2018). Como tales, los proyectos impregnan todos los aspectos de la elaboración de políticas, desde su contenido hasta las temporalidades de las iniciativas y las empresas de desarrollo.

Aunque existen debates en curso sobre las políticas de la UE en cuanto a su contenido y objetivos políticos, su aplicación a través de proyectos no se debate ni se cuestiona en el contexto de la UE. Por el contrario, se tiende a considerar que la forma de proyecto es neutral o incluso apolítica. Con algunas excepciones (por ejemplo, Abrahamsson y Angevall, 2010; Öjehag-Pettersson, 2017), la lógica del trabajo por proyectos en la UE y la aplicación de las políticas de desarrollo y cohesión a través de proyectos no se cuestiona ni se niega. Si acaso, más bien se percibe como un cambio positivo, una característica de la forma moderna de gobernar una organización supranacional. Al mismo tiempo, las investigaciones realizadas en el

ámbito de las ciencias de la gestión y los estudios de proyectos abordan cada vez más las consecuencias negativas de los proyectos, como el estrés crónico, la sobrecarga de trabajo y el agotamiento entre los trabajadores de proyectos, y muestran el "lado oscuro" de la proyectificación (por ejemplo, corrupción, sexismo, blanqueo de dinero, esclavitud moderna) (Hodgson & Cicmil, 2006; Aguilar Velasco & Wald, 2022; Locatelli, Konstantinou, Geraldi, & Sainati, 2022).

Volviendo a debates más generales sobre la inclusión democrática y la transparencia, la proyectificación se ha descrito como ejemplo de "tendencias macropolíticas más amplias hacia acuerdos organizativos descentralizados y 'posburocráticos'" (Bailey, Hodgson y Checkland, 2019; cf. Mukhtar-Landgren 2021; Fred 2020; Ettelt y Mays 2019). Esta evolución tiene consecuencias en términos de inclusión en redes/asociaciones, así como de capacidad desigual para participar en el desarrollo debido a las diferencias en recursos y competencias para obtener financiación de proyectos. Por ello, es necesario ir más allá de la tendencia a despolitizar el uso de los proyectos como herramienta neutral y abrirse a debates más amplios sobre la política de los proyectos.

5. Líneas futuras de investigación

Reflexionando sobre las futuras líneas de investigación sobre la proyectificación de la UE, cabe señalar que, a pesar del corto periodo de interés científico por esta cuestión, cada vez somos más conscientes de este fenómeno y de sus consecuencias. Numerosos trabajos en curso nos permiten comprender mejor lo que caracteriza a los procesos de proyectificación de la UE. Al mismo tiempo, la concentración de la investigación en torno a cuestiones sobre la naturaleza de los proyectos de la UE y su gobernanza, que se repite en numerosos trabajos, puede suscitar cierta inquietud. ¿La homogeneidad de los temas y la convergencia de opiniones conducen a una "deriva académica"? Para evitarlo pueden tomarse dos medidas. En primer lugar, es importante abordar nuevos problemas de investigación. En segundo lugar, es necesario llevar a cabo investigaciones interdisciplinarias y transdisciplinarias. Actualmente, en la investigación sobre la proyectificación de la UE, el diálogo interdisciplinar es indiscernible. Los académicos de distintas tradiciones científicas que se interesan tanto por las cuestiones de la UE como por la proyectificación, rara vez publican textos conjuntos y realizan investigaciones conjuntas. La combinación de diferentes perspectivas ontológicas y epistemológicas puede hacer más profunda nuestra investigación sobre la proyectificación de la UE y abrir nuevos campos de investigación.

Además, como han demostrado nuestras consideraciones, los proyectos de la UE como método de aplicación de políticas públicas, así como método de gestión de organizaciones, son ambivalentes. Quizás la universalidad y escalabilidad del proyecto como método lo hacen muy atractivo —por un lado, permite la imple-

mentación de objetivos muy complejos a nivel de toda la comunidad europea, por otro— la implementación de micro cambios en comunidades locales. Sabiendo que los proyectos no son "inocentes" y tienen un "lado oscuro", cabe preguntarse si otras formas de cooperación podrían sustituirlos. ¿Sería posible construir y gestionar la comunidad europea sin proyectos o con un número limitado de ellos? ¿Qué otra forma participativa podría sustituir a los proyectos de la UE? La pregunta que, en nuestra opinión, merece la pena plantearse en el futuro es si la desproyectificación es posible en el espacio de la comunidad europea y, en caso negativo, cómo podría reducirse el impacto negativo de la proyectificación de la UE y reforzarse el positivo.

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Factores determinantes de los aspectos negativos de la proyectificación

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Resumen

Por lo general, la proyectificación tiene implicaciones positivas y se considera una estrategia innovadora y progresista para alcanzar eficazmente los objetivos empresariales; sin embargo, numerosos miembros de equipos de proyecto sufren estrés, sobrecarga de trabajo y fatiga. Este capítulo pretende investigar los factores determinantes de los aspectos negativos de la proyectificación y sus efectos en diversos niveles. Para ello, se realizó una revisión de la bibliografía para explorar las limitaciones de la proyectificación y sus implicaciones en los trabajadores de proyectos. Los estudios existentes concluyen que la proyectificación tiene inconvenientes en múltiples niveles, incluidos la sociedad, las organizaciones, los proyectos y los individuos, que se examinarán en este capítulo.

Palabras clave: Proyectificación; Personal; Bienestar; Aspectos negativos; Inconvenientes.

1. Introducción

El concepto de proyectificación se describe en gran medida como la institucionalización de proyectos en la sociedad. Ya en 1995 Christophe Midler creó este término al presentar un interesante examen de la proyectificación organizativa en su estudio sobre Renault (Midler, 1995). Con el tiempo, el nivel de examen y el alcance del estudio sobre este tema se ha ampliado y, en la actualidad, la investigación sobrepasa la proyectificación de las empresas industriales y el ámbito de la gestión de proyectos, donde comenzó inicialmente el término (Jensen et al., 2016). Junto con esta creciente preocupación, se han puesto de manifiesto los factores que propician y las consecuencias de la proyectificación en varios niveles. A raíz de esta evolución, se ha argumentado que la noción de proyectificación merece más atención.

En los últimos años, la definición de proyectificación ha evolucionado y ahora se describe como el uso generalizado de proyectos y sus "consecuencias desestabilizadoras en las logísticas perpetuas de la empresa, incluidas las clasificaciones de tareas, las regulaciones jerárquicas y las relaciones con los proveedores" (Schoper et al., 2018).

La proyectificación tiene implicaciones para el sistema financiero de la empresa y la sociedad, ya que empuja a los trabajadores a incorporar el trabajo por proyectos, gestionar su vida privada como un proyecto y posicionarse a sí mismos y a los demás como proyectos (Henning y Wald, 2019).

Las organizaciones utilizan proyectos para gestionar el trabajo con el objetivo de mejorar el rendimiento y la imagen de la organización (Lloyd-Walker et al., 2018). El impulso de la proyectificación ha dado lugar a una necesidad sustancial de empleados experimentados, conocedores y competentes (Yang et al., 2017). Las personas deben ser ágiles, flexibles y estar bien organizadas, ya que la proyectificación conlleva plazos ajustados, una elevada carga de trabajo, variedad de tareas y una enorme presión sobre el personal (Henning y Wald, 2019). Lo anterior podría suponer riesgos para la salud y el bienestar de los empleados, lo que conduciría a efectos contraproducentes, a saber, infelicidad, nerviosismo, insatisfacción y rotación de personal, entre otros efectos negativos (Schoper et al., 2018).

2. PROYECTIFICACIÓN Y TRABAJADORES DE PROYECTOS

Como se ha expuesto anteriormente, la proyectificación denota un cambio de la acción monótona al trabajo en proyectos únicos, por lo que requiere una comunicación continua entre las partes y la disposición a trabajar horas extraordinarias, en estructuras matriciales, sacrificando con frecuencia la estabilidad de la vida laboral. En este sentido se puede establecer una similitud de las consecuencias negativas derivadas de la proyectificación y otras situaciones. Así, en muchos estudios se destacan los efectos adversos de la proyectificación en grupos desfavorecidos o susceptibles, como pacientes, inmigrantes o trabajadores precarios (Henning y Wald, 2019, Schoper et al., 2018, Yang et al., 2017). Ver el efecto de la proyectificación sobre el ser humano contrasta claramente con sus reconocidas ventajas a nivel de gestión, que demuestran la influencia positiva del trabajo por proyectos en las empresas.

En cuanto a las consecuencias negativas de la proyectificación, los estudios existentes se centraban principalmente en la desigualdad, la inseguridad profesional y el desempleo (Sage, 2016). Söderlund y Bredin (2011) identificaron como principales inconvenientes de la proyectificación el riesgo de re-burocratización, el descuido de la necesidad de integración de los proyectos en programas o carteras, el tiempo limitado para el desarrollo de conocimientos, el estrés por los plazos agobiantes y la falta de confianza.

Jerbrant (2014) subrayó que la proyectificación está ciertamente impulsada por implicaciones aparentes, en el sentido de que cada reestructuración posterior resuelve algunas dificultades pero genera nuevos problemas.

Sobre la base de lo anterior, hay cuatro categorías principales de factores determinantes de los efectos negativos de la proyectificación en los individuos: factores ambientales, factores organizativos, factores del proyecto y factores individuales, que se examinarán en detalle en las subsecciones siguientes.

2.1. *Factores medioambientales*

Entre estos factores se incluyen los aspectos sociales que influyen en la organización y su personal, por ejemplo, la cultura, las diferencias socioeconómicas, los sistemas jurídicos y políticos y las instituciones formales e informales (Jalocha, 2019). Los factores a nivel social desempeñan un papel importante en la determinación de políticas y procedimientos.

Diversos autores consideraron la proyectificación como el resultado de varios tipos de mecanismos en el lugar de trabajo que desafían sin cesar a la organización (Lundin, 2016). Las influencias externas al lugar de trabajo, como los conflictos trabajo-familia, también afectan al bienestar de los trabajadores de proyectos (Lundin, 2016) y los exponen a un mayor riesgo de agotamiento (Singh et al., 2012). Además de lo anterior, las características del sector son otros factores que afectan al impacto de la proyectificación en las personas. Por ejemplo, la industria de la construcción es una industria de alto riesgo, y el trabajo de los directores de proyectos de construcción es a menudo muy estresante, debido a las presiones de tiempo, las incertidumbres y la estructura social dinámica implicada en los proyectos de construcción. Estudios anteriores demostraron que el estrés laboral por objetivos reduce el rendimiento en las tareas de los directores de obra, y que el rendimiento interpersonal se maximiza con un nivel moderado de estrés por objetivos.

Además, la proyectificación rompe el equilibrio familia-trabajo, ya que exige largas jornadas laborales, flexibilidad y disponibilidad. Sin embargo, la familia y los amigos y otros apoyos no relacionados con el trabajo son muy importantes para aliviar la tensión psicológica. Love y Edwards (2005) examinaron la capacidad predictiva del modelo completo de estrés laboral para directores de proyectos de construcción con el fin de evaluar el bienestar psicológico de los empleados en términos de salud laboral y satisfacción en el trabajo. Sus conclusiones revelaron que el apoyo social (familia y amigos) tiene efectos significativos en el bienestar psicológico, y que el apoyo no relacionado con el trabajo es más significativo que el apoyo laboral para aliviar la tensión psicológica.

Todo lo anterior confirma los resultados de Lundin (2016), según los cuales la expansión del trabajo por proyectos está generando más oportunidades laborales, aunque el éxito está relacionado con la disponibilidad y la flexibilidad. Las perso-

nas están empezando a sacrificar sus planes a largo plazo y la presión social para terminar sus tareas, lo que indica que la proyectificación está afectando no solo a la forma de trabajar de los empleados, sino también a cómo viven su vida privada (Lindgren y Packendorff, 2006).

2.2. *Factores organizativos*

Estos factores tienen que ver con el contexto organizativo de los proyectos que repercuten en las prácticas de gestión y en los trabajadores. Por ejemplo, un entorno de carrera profesional, una estructura organizativa deficiente y la dualidad de roles afectan tanto al estrés psicológico como al rendimiento de los empleados (Naoum et al., 2018). Asimismo, los entornos laborales pueden producir emociones como la ira a la hora de alcanzar los resultados deseados. Lindebaum y Fielden (2011) sugirieron que las emociones negativas del líder influyen en una variedad de resultados negativos de los seguidores.

Sumado a lo anterior, muchas organizaciones están utilizando sistemas de control de comportamiento presupuestario basados en la retórica de la profesionalización mediante la promoción de conductas de compromiso de tipo empresarial, como la autodisciplina, la autodirección, la automotivación, la autorrealización y la autoexplotación (Legault y Chasserio, 2012). Sin embargo, a pesar de las reivindicaciones de autonomía y autodeterminación en el trabajo, los directivos establecen controles bastante estrictos a través de la gestión y la retórica de la profesionalidad. La posición de fuerza del cliente anula el control directo del empresario, transfiriendo una parte importante del riesgo inherente a la Gestión en Proyectos a los demás empleados. Las largas jornadas de horas extraordinarias no planificadas y no remuneradas son el obstáculo más importante al que se enfrenta la mano de obra en las empresas proyectificadas y afectan a la satisfacción de los empleados. Además, las empresas consiguen dedicaciones extra de los empleados i inculcando en los trabajadores un profundo sentido de compromiso individual con los objetivos y valores de la empresa y un sentido de autosuficiencia sobre sus carreras y vidas (Gaim et al., 2019). Sin embargo, los trabajadores no se benefician de la extremada autonomía laboral, sino que priorizan el trabajo sobre su salud (Asquin et al., 2010).

Sobre la base de lo anterior, dentro de la categoría de factores organizativos, hay un grupo de subcategorías que podrían identificarse, a saber, estructura y clima organizativos (por ejemplo, complejidades, dilemas éticos), cultura organizativa (por ejemplo, culturas en paralelo) y mecanismos de control (por ejemplo, prácticas discursivas).

Las prácticas de gestión de recursos humanos (GRH), los contratos y las prestaciones también son motivos de depresión y ansiedad si no se abordan bien. Por ejemplo, los empleados que no están satisfechos con las prácticas de GRH de su

empresa y con las recompensas/castigos laborales tienen una menor satisfacción laboral. Asimismo, los empleados con contratos de corta duración tienen más probabilidades de sufrir depresión y ansiedad (Aguilar Velasco y Wald, 2022).

Los factores estresantes de la organización afectan a los proyectos y a los empleados. Existe una relación directa con las tensiones y prácticas contradictorias (Gaim et al., 2019), las lógicas organizativas contrapuestas y las limitaciones de recursos (Arvidsson, 2009), la burocracia y los diferentes puntos de vista de los responsables de la toma de decisiones (Ng et al., 2005) que no tienen en cuenta el bienestar de los empleados como principales raíces contextuales del malestar psicológico en el trabajo de proyectos.

Por lo tanto, un factor que contribuye a los efectos negativos de la proyectificación es la tecnocratización de la organización. En las organizaciones proyectificadas, los individuos se ven inmersos en el proceso y pierden su capacidad para desafiarlo o entablar un debate sobre su situación. Cicmil et al. (2016) sugirieron que los discursos sobre proyecto pueden tener consecuencias existenciales de mayor alcance para los trabajadores de proyectos y pueden crear condiciones difíciles de sobrellevar, difíciles de justificar y difíciles de controlar.

Ekstedt (2009) escribió que, debido a esta tendencia, el riesgo (por ejemplo, en relación con los ingresos obtenidos) puede transferirse de las empresas a los individuos.

2.3. *Factores del proyecto*

Estos factores comprenden características relacionadas con el proyecto que afectan a los resultados laborales y al bienestar de los miembros del proyecto (Darling y Whitty, 2020). Entre estos factores, la demanda de trabajo y los problemas de recursos laborales encabezan la lista.

La escasez de oportunidades de descanso, las rutinas inadecuadas, los recursos de tiempo limitados y los numerosos proyectos simultáneos provocan reacciones de estrés psicológico, un menor desarrollo de las competencias y desviaciones del plazo (Chang et al., 2013). Del mismo modo, el estudio de Singh et al. (2012) sobre los desarrolladores de software que se enfrentan a la ambigüedad de rol extra, el conflicto de roles, la presión del horario, los turnos irregulares, la falta de cooperación del grupo, la vulneración del contrato psicológico y el conflicto trabajo-familia. Todo ello demostró una relación directa con el riesgo de agotamiento laboral. Los trabajadores de proyectos son propensos al agotamiento laboral, ya que realizan múltiples proyectos y, por lo tanto, deben hacer frente a plazos difíciles, largas jornadas de trabajo y clientes que cambian sus demandas. Además, los trabajadores están sometidos a tareas monótonas y repetitivas, conflictos de equipo, nerviosismo por la pura competencia, preocupación por la motivación y ambición superiores y expectativas familiares.

Además, los problemas de trabajo en equipo (por ejemplo, conflictos y rotación de personal) son otro factor determinante. Los comportamientos y estilos de liderazgo de los jefes de proyecto pueden influir en la intención de rotación de los trabajadores del proyecto. El estilo de liderazgo tiene un impacto sustancial en el bienestar de los trabajadores y en el rendimiento de la organización. Existen relaciones significativas entre el comportamiento de los líderes, el bienestar de los trabajadores y los resultados organizativos, como el liderazgo actual, la satisfacción laboral, el compromiso organizativo y la intención de rotación. Por lo tanto, los directivos deberían intentar construir una situación laboral colectiva sólida y entusiasta y centrarse más en la satisfacción de los empleados, así como en los estilos de liderazgo para reducir las rotaciones.

La cultura del proyecto es otro factor del proyecto. Una cultura sólida basada en la aceptación de la incertidumbre (por ejemplo, en los roles, las relaciones de poder, las rutinas y las prácticas organizativas) puede promover el desarrollo de una mano de obra leal, comprometida y eficaz, y sostener una forma fluida y flexible del proyecto trabajando horas extras. De forma crítica, la incertidumbre permite a los individuos sostener múltiples identidades como "experto" y "consultor" (Chawl et al., 2018).

Algunos estudios analizaron los factores estresantes del proyecto que afectan a los miembros del proyecto y descubrieron que los individuos con posibles conflictos de intereses, personalidades difíciles, plazos, gestión de personas de diferentes disciplinas y disonancia emocional generan condiciones difíciles de tratar, explicar y gestionar (Cicmil et al., 2016).

2.4. *Factores individuales*

Estos factores están relacionados con las características del personal y los aspectos psicológicos que influyen en la mejora de las respuestas al estrés laboral, como una mayor satisfacción bajo el efecto de las elevadas exigencias del trabajo (Caniëls, et al., 2012).

Entre estos factores, las características demográficas encabezan la lista. El compromiso organizativo y profesional tiene un doble efecto en el rendimiento de la empresa: efecto complementario y efecto contradictorio. Los efectos de estos compromisos en la satisfacción laboral, el rendimiento en el trabajo y los problemas laborales son especialmente importantes en un entorno laboral. El estudio de Chawla et al. (2018) en un entorno laboral de carácter burocrático demostró que el compromiso organizacional tiene un impacto sustancial e inmediato en la satisfacción laboral y el rendimiento laboral y una influencia inversa considerable en los problemas laborales. La mejora de la satisfacción, y la mejora del rendimiento, pero también el aumento de los problemas con los directivos se correlacionaron con una mayor permanencia en la organización (Chawla et al., 2018).

Adicionalmente, se encontró que el capital humano (empleados que conocen su oficio/habilidades) y el capital social (empleados que se conocen entre sí/relaciones) son fundamentales para el progreso profesional basado en proyectos. En este sentido, el capital humano y el capital social forman un ciclo de competencias profesionales que se refuerza a sí mismo y que impulsa a una persona a través de proyectos sucesivos. Por tanto, los recursos personales y los rasgos de personalidad, así como los estados emocionales, son determinantes clave.

Weiss (1983) examinó el estrés organizativo entre los directivos, los síntomas de tensión resultantes y si el apoyo social puede reducir los síntomas de tensión. Sus resultados mostraron que el estrés laboral está ciertamente relacionado con las tensiones psicológicas y fisiológicas.

En un estudio similar, Berg y Karlsen (2013) descubrieron que la comunicación positiva con uno mismo, la visualización, los objetivos claros, la retroalimentación, el empoderamiento y la resiliencia son herramientas valiosas y eficaces que ayudan a reducir y afrontar el estrés laboral. Asimismo, Lindgren et al. (2014) examinaron los procesos emocionales asociados al discurso de la gestión de proyectos y descubrieron que el discurso se invoca de manera que hace que las personas interioricen estados emocionales relacionados con el caos y la ansiedad, al tiempo que atribuyen sentimientos de certeza y confianza a normas y procedimientos organizativos externos.

Los temas más estudiados relacionados con los factores individuales son la motivación laboral, las diferencias/retos de género y las estrategias de superación. Los estudios anteriores en esta categoría investigaron no sólo los factores individuales, sino también diversas combinaciones de características de personalidad, emociones y percepciones de los procesos del trabajo y la empresa que desencadenan que los individuos respondan de forma diferente a los factores estresantes. Por ejemplo, la desigualdad o la injusticia de género repercuten en los estados emocionales y las respuestas conductuales de los empleados y afectan a su compromiso (Chaudhry et al., 2020). Asimismo, pruebas empíricas demuestran que factores como la edad y el nivel educativo de los empleados influyen decisivamente en la forma en que las personas afrontan el estrés (Haynes y Love, 2004) y la falta o el desajuste de competencias pueden contribuir a la sobrecarga y a la angustia en los proyectos (Chaudhry et al., 2020; Gustavsson, 2016; Cerne, y Jansson, 2019).

3. EXAMEN MULTINIVEL DE LOS ASPECTOS NEGATIVOS DE LA PROYECTIFICACIÓN

En esta sección, se presentan de forma integrada los factores determinantes de los aspectos negativos del trabajo en proyectos y sus efectos en las personas. A diferencia de la sección anterior, en la que los determinantes se han centrado en el nivel individual, la bibliografía ha identificado los determinantes de los aspectos negativos en distintos niveles. En consecuencia, esta sección se centrará en dife-

rentes niveles interrelacionados para examinar los factores determinantes: macro (medioambiental/social/país/industria), meso (organización y proyecto) y micro (individuos). Además, terminaremos la sección haciendo hincapié en los posibles mediadores que pueden afectar a las relaciones entre los aspectos no deseados de la proyectificación y las consecuencias individuales.

3.1. *Micro Nivel*

En este nivel, se presentan las diferencias entre las personas, por ejemplo, las diferencias demográficas, las habilidades y capacidades, los recursos individuales y la orientación de la gestión, que repercuten en la forma en que los empleados actúan y afrontan los factores estresantes del proyecto (Jerbrant, 2014). Las mujeres, por ejemplo, sufren más fatiga emocional que sus colegas masculinos. Asimismo, los rasgos individuales determinan cómo se emplean la experiencia y las competencias en un escenario, la forma en que los empleados reaccionan al trabajo en equipo y los indicadores de fatiga laboral (Chang et al., 2013). Las consideraciones de motivación, como las recompensas, también pueden influir en la productividad de los trabajadores.

Aparte de las políticas de la empresa, las personas que aspiran a hacer carrera en un proyecto suelen ser personas muy dedicadas y abnegadas; participan de buen grado en el trabajo de proyectos de forma rutinaria, ya que estas personas no pueden imaginarse haciendo otra cosa (Cicmil et al., 2016). No obstante, todos los empleados están expuestos a situaciones laborales estresantes, que pueden agravar los resultados relacionados con el trabajo, la salud y el bienestar a largo plazo.

3.1. *Meso Nivel*

En este nivel, los factores organizativos afectan al proyecto y a sus miembros. Por ejemplo, las organizaciones matriciales empujan a los trabajadores a navegar entre unidades funcionales y proyectos y esperan un rendimiento superior en ambos (Dube, 2014). En entornos estructurales tan dinámicos y densos, pueden surgir variaciones en el proyecto debidas a la ambigüedad, políticas internas (por ejemplo, agendas ocultas, planes sesgados) y pueden disminuir la motivación y la eficiencia de los miembros del proyecto. Estas dinámicas se vuelven más complejas con las continuas modificaciones, los plazos poco viables y las intensas presiones (Cerne, y Jansson, 2019).

Además, los trabajadores podrían enfrentarse a problemas éticos como las diferencias de género y la deshonestidad (Kvalnes, 2014). La estructura de gobierno afecta al modo en que los trabajadores afrontan y reaccionan ante tales problemas. Las circunstancias desfavorables, como la falta de comunicación, influyen negativamente en el compromiso y la motivación de los trabajadores (Mysore et al., 2021) y en la productividad de los empleados (Samimi y Sydow, 2021). Además,

una "empresa proyectificada perfecta tiene una cultura de gestión particular que se transmite en el fomento de los empleados, el trabajo en equipo, la mejora continua y la orientación al cliente y al empleado" (Chaudhry et al., 2020). En un entorno laboral tan exigente, los ejecutivos se ven obligados con frecuencia a "hacer más con menos", lo que da lugar a comportamientos de supervisión excesivos que afectan de forma destructiva al bienestar de los miembros del proyecto y provocan la rotación de personal.

Además, la normalización del trabajo temporal genera nuevas relaciones laborales y alteraciones en el diseño de los procesos de gestión de recursos humanos (Prouska y Kapsali, 2021). En las organizaciones basadas en proyectos, las prácticas de gestión de recursos humanos son competencia del director del proyecto y no de los directores de línea o del departamento de gestión de recursos humanos (Keegan et al., 2012).

Las necesidades del puesto, los problemas del trabajo en equipo, el estilo de liderazgo de los gestores y la cultura del proyecto son facetas de la proyectificación que pueden convertirse en factores estresantes en función de los rasgos personales y los recursos personales. Además, los proyectos pueden tener exigencias contradictorias debido a la mayor necesidad de eficacia y flexibilidad para hacer frente a un entorno complicado y en desarrollo (Havermans et al., 2019). Incluso si las habilidades, la flexibilidad y el conocimiento están disponibles, los Directores de Proyecto pueden tener que hacer frente a dificultades para cumplir con los resultados del proyecto, ya que ocasionalmente tienen que gestionar plazos poco prácticos y limitaciones de recursos. Una carga de trabajo extrema puede deberse en parte a tareas paralelas que requieren una profunda priorización junto con la inadecuación de recursos, la pérdida de control, la falta de retroalimentación, la ausencia de mejora continua y los continuos cambios de un proyecto a otro, lo que requiere conexiones sociales con numerosas partes interesadas (Patanakul et al., 2016).

Estas situaciones crean una sobrecarga en los trabajadores de proyectos, que se asocia a reacciones de estrés, bajo rendimiento laboral y enfermedad (Weiss, 1983; Zika-Viktorsson et al., 2016; Brathen et al., 2021). Así pues, el trabajo en proyectos expone a los miembros del equipo a amenazas de compromiso y dedicación extremos, y al deterioro de la personalidad (Havermans et al., 2019). Los comportamientos de los directivos también pueden afectar negativamente a los resultados de los proyectos de los subordinados. Por ejemplo, los gestores pueden trasladar tensiones a los miembros del proyecto, causando altos niveles de estrés, y que podrían afectar emocionalmente al entorno natural del proyecto en su beneficio.

Además, la cultura del proyecto puede ser utilizada por los directivos para conseguir una mayor implicación de los empleados, lo que a su vez conduce a más logros (Aronson y Lechler, 2009). Sin embargo, en los proyectos con horarios de trabajo prolongados, imponer determinados comportamientos puede desencadenar el agotamiento laboral y causar depresión (Caniëls, et al., 2012).

Los anteriores efectos negativos a nivel meso ponen de relieve la importancia de un diseño adecuado del puesto de trabajo y de una cultura psicológica protectora en el lugar de trabajo para garantizar una atención adecuada a los trabajadores.

3.2. *Macro Nivel*

Los factores ambientales, como lo son el contexto socioeconómico, político, institucional y cultural, influyen en todos los demás factores a todos los niveles. En este nivel, las organizaciones normalizan, organizan y fomentan la difusión de una vida laboral "proyectificada" que implica la segregación del trabajo (Samimi y Sydow, 2021).

En este contexto, la proyectificación se ve como una cuestión filosófica, o como un cambio metafísico en la percepción del tiempo y del trabajo, donde la semántica del proyecto se cuela en nuestro diccionario cotidiano, en la sociedad y en la rutina diaria.

Por lo tanto, la proyectificación, a este nivel, es un fenómeno socialmente transformador con resultados complicados. Las limitaciones evolutivas de la proyectificación se describen desde un punto de vista filosófico. Cabe mencionar que el método basado en tareas de emplear la proyectificación no es simplemente una forma organizativa, sino que define los enfoques para dar forma a la cooperación y las relaciones sociales (Jensen, 2012). Por lo tanto, variables fundamentales como el tiempo y el espacio han variado y afectado tanto a las empresas como a los individuos.

Además, varios científicos han subrayado que la existencia del entorno de trabajo por proyectos es una distopía amenazadora en la que todo se proyectifica.

3.3. *Mediadores potenciales*

El atractivo de la proyectificación, con sus previsibles resultados satisfactorios y su eficacia en la consecución de objetivos empresariales en comparación con los enfoques habituales, ha llevado a la adopción generalizada de este fenómeno en las tres últimas décadas en muchos sectores de la sociedad. Las organizaciones que trabajan en sectores que tradicionalmente no han incorporado la gestión de proyectos, como la gestión sanitaria, el trabajo social, el desarrollo, la banca o la industria manufacturera, están adoptando esta tendencia e incluso están creando oficinas de gestión de proyectos, lo que indica su compromiso a largo plazo con la proyectificación. Sin embargo, las tres últimas décadas de adopción de la proyectificación han traído consigo consecuencias negativas, tal y como se ha expuesto en las secciones anteriores, y han demostrado que la proyectificación no es del todo una panacea.

Probablemente, la repercusión negativa más notable de la proyectificación es su impacto en las personas. Al centrarse en completar el alcance del proyecto con un

plazo y un presupuesto determinados, esto se lleva a cabo y a expensas del equipo del proyecto. Se espera que los empleados hagan sacrificios. Trabajar muchas horas bajo estrés por la inminencia de los plazos, a veces sin recibir compensación por horas extra, aceptar empleos de corta duración mientras dure el proyecto, la inestabilidad laboral son prácticas habituales en las personas que trabajan en proyectos. Todo esto ha tenido un alto coste que está dando lugar a graves problemas que van desde problemas de salud hasta la ruptura del equilibrio entre la vida laboral y familiar y la fragmentación de las familias.

Revisar la forma de ejecutar los proyectos teniendo en cuenta el bienestar de las personas se considera ahora imprescindible si el planteamiento es que la proyectificación perdure. Las asociaciones de gestión de proyectos ya han iniciado este esfuerzo y se puede observar que cada vez se presta más atención a las personas. La séptima y última edición del PMBoK del PMI ha intentado llamar la atención sobre las personas. Comienzan a verse términos como autoautonomía o equipos autónomos, entre otros, que fomentan el importante papel del individuo. Sin embargo, estos esfuerzos siguen siendo tímidos a la hora de abordar los problemas reales.

Los posibles mediadores para mitigar los efectos negativos de la proyectificación en el individuo deben explorar nuevos enfoques en tres contextos principales: 1) diseño del puesto de trabajo, 2) contratos y 3) gestión del conocimiento.

El primer mediador, y el más importante, es el diseño del puesto de trabajo. El diseño del puesto de trabajo debe tener en cuenta, si no priorizar, el bienestar de los miembros del proyecto. La gestión de proyectos ha establecido desde hace tiempo que los tres objetivos principales de los proyectos son el alcance, el tiempo y el coste, y el diseño del trabajo o los planes del proyecto se desarrollaron simplemente para lograr estos objetivos.

Ahora estos objetivos deben incluir el bienestar de los miembros del proyecto, si no explícitamente, sí implícitamente. Para lograrlo, deben establecerse políticas de recursos humanos que garanticen que las prácticas atípicas en el trabajo de proyectos —como la jornada laboral de 12 horas— no se normalicen. En las organizaciones matriciales o mixtas suelen existir este tipo de políticas de gestión de recursos humanos, pero no son aplicables a los equipos de proyecto debido al carácter "urgente" del mismo. Tales políticas deben basarse en la voz de los miembros del equipo de proyecto y pueden incorporar un tope de horas de trabajo, un tope de sobrecarga admisible, días de descanso garantizados por periodo de trabajo, horas extraordinarias remuneradas, selección y asignación adecuadas.

Una vez establecidas y difundidas las políticas, los directores de proyecto y los miembros del equipo deben atenerse a ellas en el diseño del trabajo o los planes del proyecto. Las técnicas de gestión de proyectos incluyen una serie de herramientas que pueden utilizarse, como la nivelación de recursos o los topes en las cadenas críticas.

Los contratos en la gestión de proyectos es otra de las variables que se puede mejorar. Muchas organizaciones, intencionadamente o no, han utilizado los contratos de los trabajadores en proyectos como una instrumento legal para "abusar" del empleado. Estos contratos deben redactarse de nuevo para tener en cuenta los derechos básicos del empleado. Por lo general, estos contratos se redactan en el mundo de los proyectos en beneficio exclusivo del proyecto, mientras que muchos derechos y prestaciones debidos se pasan por alto debido a la naturaleza temporal del proyecto. Además de garantizar los derechos y beneficios, los términos de estos contratos deberían considerar formas de compensar la inestabilidad laboral.

La tercera y última variable es la gestión del conocimiento. La mejora en este contexto beneficiaría en última instancia al individuo y a la organización tanto a corto como a largo plazo. La formación continua y el desarrollo profesional de los miembros del proyecto han demostrado su eficacia para mejorar la satisfacción de los empleados. Los empleados y la retención de conocimientos son fundamentales para el éxito empresarial sostenible. Esta importante área se ha descuidado durante mucho tiempo en el mundo de los proyectos debido, una vez más, a la naturaleza temporal de los mismos.

Las mejoras para mitigar las repercusiones negativas de la proyectificación en el individuo pueden aplicarse también a muchos otros contextos, pero mejoras en el diseño de los puestos de trabajo, los contratos y los contextos de gestión del conocimiento pueden ayudar sin lugar a dudas a mitigar las consecuencias negativas de la proyectificación.

4. Conclusiones

Este capítulo presenta una revisión bibliográfica sistemática y exhaustiva e integra los distintos elementos relacionados con los aspectos negativos de la proyectificación y sus efectos en los individuos en un análisis multinivel.

El examen de la bibliografía demostró que el nivel de análisis ha pasado de reconocer la proyectificación únicamente como una trayectoria estructural en la reestructuración organizativa, a considerarla un fenómeno fundamentalmente de cambio social con consecuencias complejas. Como era de esperar, puede observarse cómo las definiciones de la proyectificación han seguido una trayectoria similar.

Más allá de estas observaciones descriptivas, se ha analizado y debatido sobre los factores determinantes de los aspectos negativos de la proyectificación en tres niveles diferentes: micro, meso y macro, donde cada nivel representa una visión especial del trabajo por proyectos con algunas características predominantes. Estas características ponen de relieve algunos rasgos comunes de cada uno de los niveles, pero también implican que la forma de entender la proyectificación cambia en función de la perspectiva paradigmática adoptada por el investigador, el momento y el lugar en que se realizó la observación y el nivel de observación. Como se ha

destacado al presentar esta conceptualización, la proyectificación como fenómeno se caracteriza por una especie de fluidez y amorfismo; el fenómeno no tiene límites claros y "cae en cascada" por toda la sociedad con consecuencias negativas variables.

5. Líneas futuras de investigación

En este capítulo se analizaron los factores determinantes negativos de la proyectificación en varios niveles y sus implicaciones para las personas. Para comprender sistemáticamente los efectos de la proyectificación en los individuos, se necesita una visión más holística y sistemática de la proyectificación que abarque más niveles.

Esta investigación apenas ha expuesto la capa superficial de la proyectificación y ofrece una primera aproximación de los factores determinantes negativos. Las investigaciones futuras deberían ampliarse para examinar la pertinencia de las teorías sociológicas y psicológicas en relación con los factores estresantes de los proyectos y sus efectos en el bienestar de los participantes. Los futuros investigadores también podrían evaluar cómo influye el trato laboral en el estrés laboral. Otro tema en evolución es la "proyectificación personal", que implica los caracteres, actitudes, capacidades y experiencias de un empleado y las consideraciones psicológicas que afectan a la reacción ante las facetas adversas del trabajo por proyectos (por ejemplo, Yip et al., 2008).

Los resultados de la fragmentación de la vida personal y los avances profesionales a causa de los proyectos requieren igualmente de estudios adicionales.

Finalmente, sería interénte el estudio de las relaciones entre el entorno institucional y los comportamientos de los empleados.

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Proyectificación de la sociedad, una perspectiva sociológica

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Resumen

Hasta ahora, la investigación en el campo de la proyectificación se ha dedicado principalmente al fenómeno intraorganizativo de la creciente prevalencia de los proyectos en el mundo empresarial y la transformación que ésta conlleva. Son cada vez más los investigadores que se centran también en la evolución a nivel macroeconómico o social. Las primeras investigaciones empíricas ponen de relieve, tomando Alemania como ejemplo, que la proyectificación también está ganando protagonismo en ámbitos de la sociedad ajenos a la economía. Sin embargo, apenas se ha investigado por qué los individuos quieren participar en proyectos, qué papel desempeñan los proyectos en la configuración de los procesos sociológicos y qué marcos institucionales pueden influir en estos procesos. A lo largo de este capítulo se ilustrará que los proyectos ofrecen una oportunidad ideal para la autorrealización a través de una intensa colaboración con otras personas. Esto es más probable que ocurra sobre una base cultural-cognitiva apropiada y es menos probable que se logre a través de reglamentos, normas o estándares. Igualmente se indica cómo puede fomentarse la proyectificación para dominar mejor los múltiples retos sociales del futuro.

Palabras clave: Proyectificación; Sociología; Teoría Institucional; Sociedad Proyectual.

1. Introducción

En este capítulo se aplicará una perspectiva sociológica al fenómeno de la proyectificación, cada vez más estudiado en la investigación durante los últimos años. Los estudios iniciales de este fenómeno en el fabricante de automóviles Renault (Midler, 1995) mostraron que la proyectificación se asociaba principalmente a su creciente

prevalencia en las empresas y a la transformación de las estructuras, procesos y culturas organizativas que la acompañaba. Así pues, los estudios sobre el desarrollo y el statu quo de la proyectificación se centraron en la economía. Más allá de eso, la investigación sobre el impacto de la proyectificación en otros ámbitos de la sociedad sigue siendo escasa (Wagner, 2022). Especialmente en tiempos de crecientes retos sociales, es interesante que todos los responsables de la toma de decisiones en nuestra sociedad comprendan qué pueden hacer para utilizar mejor las facultades creativas de las personas en los proyectos. El capítulo muestra que los proyectos son una forma adecuada de aprovechar la necesidad de autorrealización de los individuos en cooperación con otras personas. Sartre (1984) afirma, por ejemplo, que la realización de proyectos es una expresión de la libertad de las personas, que mediante el uso de proyectos, la realidad está sujeta a una transformación continua, y que "actuar" significa modificar la forma del mundo o podría verse como una manera de disponer los medios para un fin.

Hasta ahora, los proyectos y la gestión de proyectos se han entendido principalmente en el entorno empresarial como la realización racional y más eficiente posible de objetivos predeterminados. Con una mirada a la psicología, la sociología y la filosofía, salen a la luz otros aspectos de los proyectos y su realización. No se trata tanto de la gestión eficaz de los procesos de entrega, sino más bien de la cooperación co-creativa de las personas, que tiene su origen en un conjunto de necesidades intrínsecas. Hay suficientes ejemplos de esta forma de colaboración, por ejemplo, en las artes y la cultura, el desarrollo comunitario o el polifacético voluntariado de los ciudadanos de nuestra sociedad.

El objetivo de este capítulo es, por un lado, contribuir a repensar la gestión de proyectos e inspirar la investigación correspondiente en estos campos menos estudiados. Por otro, pretende mostrar cómo se puede avanzar en la proyectificación de nuestra sociedad en su conjunto. En última instancia, también pone de manifiesto la necesidad de tender puentes entre la disciplina de la gestión de proyectos y disciplinas no técnicas que van desde la psicología y la sociología hasta la filosofía, por citar sólo algunas.

Tras la introducción, se muestra qué papel desempeñan los proyectos en nuestras vidas y qué perspectivas son pertinentes para analizarlos. A continuación, se analiza el fenómeno de la proyectificación, que abarca desde el micronivel de nuestro entorno inmediato hasta el macronivel de los procesos sociales. Por último, se analizan tres perspectivas de la proyectificación: la individual, la sociológica y la institucional. El capítulo se cierra con una serie de conclusiones y unas futuras líneas de trabajo vinculadas a los temas estudiados.

2. El papel de los proyectos en nuestras vidas

Los proyectos han existido desde los albores de la humanidad (Morris, 2013). Aunque no sepamos mucho sobre los proyectos de los primeros tiempos, existen

las primeras narraciones sobre proyectos en el siglo XVII, que incluso se caracterizó como "la era de los proyectos". En aquella época, los proyectos eran algo exótico que requería habilidades casi inhumanas para lograr un resultado. Por ello, en estos relatos la atención se centra sobre todo en las personas implicadas y sus características. Daniel Defoe (1697:18), por ejemplo, describió al "proyectista" como "aquel que, habiendo llevado mediante principios justos y llanos de sensatez, honradez e ingenio cualquier artificio a una perfección adecuada, consigue lo que pretende, no roba a nadie, pone su proyecto en ejecución y se contenta con el producto real como beneficio de su invención". Los proyectos de esta época estaban relacionados con el avance de la sociedad, como la mejora de la sanidad, la educación o la modernización de las infraestructuras.

Con el inicio de la industrialización y la prosperidad económica basada en el progreso tecnológico, los aspectos relacionados con la productividad y la eficiencia de los procesos basados en la división del trabajo se convirtieron en el centro de atención. Los proyectos y más tarde también la gestión sirvieron para optimizar los procesos de creación de productos. Las personas desempeñaban en ello un papel secundario. Destacados representantes de la época, como Max Weber, Henri Fayol o Frederick Winslow Taylor, desempeñaron sin duda un papel esencial a la hora de allanar el camino para la gestión de proyectos, que se aplicó por primera vez en proyectos de defensa de los Estados Unidos de América tras el final de la Segunda Guerra Mundial (Hodgson & Muzio, 2012).

Hoy en día, la conciencia sobre los proyectos y la gestión de proyectos se ha generalizado en muchos sectores de la sociedad. Antonio Nieto-Rodríguez (2019: 3) habla incluso de una "revolución de los proyectos" afirmando que "desde nuestra vida personal a la profesional, desde las corporaciones a los gobiernos, desde los individuos a las naciones, los proyectos son la nueva realidad." A menudo se plantea la cuestión de cómo pueden delimitarse claramente los proyectos, qué puede designarse realmente como proyecto y qué empresas es mejor no ejecutar en forma de proyecto.

Suele haber acuerdo en que los proyectos están orientados al futuro e implican una serie de actividades para lograr objetivos específicos. Sin embargo, hay un gran margen de interpretación a la hora de responder a una serie de preguntas de importancia fundamental. Por ejemplo, la cuestión de si iniciamos y ejecutamos proyectos de forma autodeterminada, o si lo hacemos por encargo de otra persona, a saber, un cliente o un patrocinador.

También la cuestión de si somos libres en la ejecución del proyecto o tenemos que seguir un plan predeterminado desempeña un papel central en un contexto en constante cambio. ¿Estamos solos en la ejecución del proyecto o colaboramos con otras personas de un modo u otro? ¿Hasta qué punto es único lo que estamos realizando con el proyecto, o ha habido iniciativas similares cuyo planteamiento podemos intentar reproducir?

Responder a estas y otras preguntas depende fundamentalmente del alcance de los proyectos. En las empresas, los proyectos tienden a estar determinados externamente, hay menos libertad para el individuo, todo el mundo trabaja de acuerdo con un plan de proyecto preparado de antemano y sigue las instrucciones de un director de proyecto (Jensen et al., 2017). En cambio, en la creación artística y artesanal, un proyecto se construye a partir de las instrucciones de un artista, que aporta todas sus habilidades a la realización de un objeto sin requerir necesariamente la colaboración de otros (Gratton y Sheringham, 2005). Los proyectos que producen productos técnicos perfeccionados se centran en la mejora incremental y la consecución de las máximas economías de escala, mientras que los proyectos destinados a cambiar la cultura organizativa tienden a centrarse en la consecución y el mantenimiento de esa nueva cultura al tiempo que obtienen la máxima participación de las partes interesadas.

Aunque la diversidad de proyectos ha aumentado considerablemente en los últimos años, se han desarrollado enfoques, procesos y métodos estándar para la gestión de estos proyectos. Aunque esto es conveniente para lograr un cierto grado de confianza en la aplicación repetida de enfoques probados en territorios inexplorados de proyectos, muchos de ellos fracasan simplemente por la razón de que no existe un enfoque "de talla única". Por ello, Winter y Szczepanek (2009: 28) proponen siete imágenes diferentes para los proyectos y enfoques adaptados para su gestión (véase la figura 1), de modo que "se logre una comprensión mucho mayor, para los proyectos muchas otras cosas a un mismo tiempo, por lo que las imágenes múltiples contemplan más de lo que está sucediendo. También pueden ayudar a gestionar los proyectos en conjunto con los propios conocimientos y experiencia".
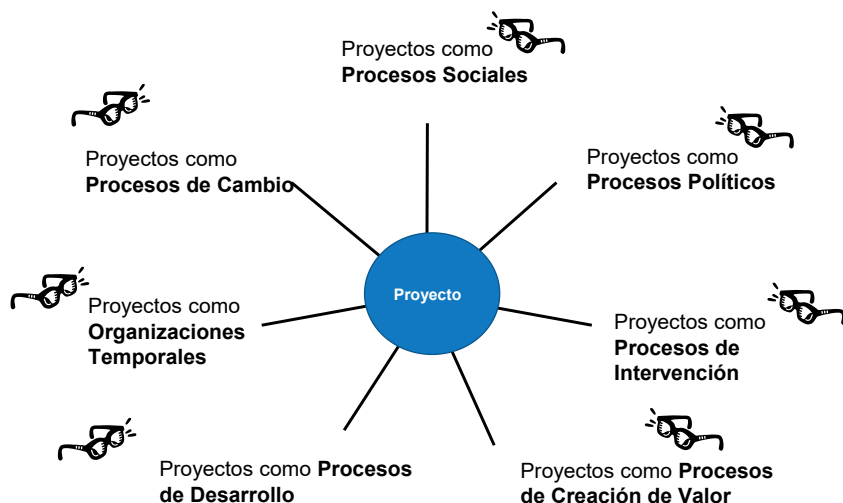

Figura 1: Imágenes del marco conceptual de los proyectos (Winter & Szczepanek, 2009: 29)

Turner et al. (2010), por su parte, abordan la cuestión desde una perspectiva teórica y desde distintas escuelas de gestión de proyectos. Presentan nueve perspectivas que se basan en las orientaciones teóricas disponibles en el campo de la gestión de proyectos de las que un gestor de proyectos puede extraer ideas cuando trabaja en un proyecto.

Una de estas perspectivas es el proyecto como sistema social en el que personas trabajan con otras personas en proyectos para personas. En estos proyectos, uno de los factores que desempeñan un papel crucial en la práctica es la capacidad de seleccionar y contratar a los miembros del equipo adecuados para el proyecto, así como de proporcionar un liderazgo apropiado. Para ello se requieren, sobre todo, competencias en el trato con las personas. Además, se abordan cuestiones importantes, como por qué querríamos participar nosotros mismos en un proyecto, qué expectativas tenemos de los resultados y el trabajo del proyecto, y qué papel queremos desempeñar.

No cabe duda de que hoy en día los proyectos desempeñan un papel preeminente en la economía y en todos los demás ámbitos de la sociedad. En el pasado, sin embargo, la literatura sobre gestión de proyectos se ha ocupado principalmente de los proyectos en las empresas y los demás ámbitos de aplicación en la sociedad recibían menos atención. La atención prestada a los aspectos técnicos y metodológicos de la gestión de proyectos ha ocultado, por un lado, nuestra visión de los aspectos sociales de los proyectos y, por otro, nuestro interés por los proyectos en el ámbito social.

No ha sido hasta que se inició la investigación sobre la proyectificación de la sociedad y las primeras publicaciones sobre una sociedad de proyectos cuando comenzó el redescubrimiento de los proyectos fuera del ámbito económico.

3. Proyectificación – desde el nivel micro al macro

La electrificación de nuestra sociedad hace ya más de 125 años, a medida que avanzaba la revolución industrial, ha supuesto un enorme progreso. Está por ver si es posible un desarrollo social similar con la proyectificación, pero es una tendencia que comenzó con las observaciones de Christophe Midler (1995) en el fabricante de automóviles Renault. Midler observó en Renault que, con el paso de los años, no sólo aumentó el número de proyectos, sino que la organización cambió significativamente debido a la mayor importancia de los proyectos. El papel de los gestores de proyectos se hizo cada vez más importante, y algunos de ellos dependían directamente del consejo de administración. Diversas estructuras orientadas a los proyectos, como las oficinas de gestión de proyectos (PMO), les prestaban apoyo. Las estructuras organizativas, los procesos y la cultura de la empresa se vieron influidos en gran medida por los proyectos. Desde la primera publicación sobre el tema en 1995, la investigación se ha dedicado intensamente

a la proyectificación, analizando diversas facetas de la cuestión en varios niveles de observación.

Jacobsson y Jalocha (2021: 1583) identifican cuatro imágenes distintas de la proyectificación, en concreto "la proyectificación como enfoque de gestión, la proyectificación como tendencia social, la proyectificación como estado humano y la proyectificación como cuestión filosófica". Mientras que el primer tipo de investigación sobre la proyectificación examina el cambio organizativo a nivel meso a medida que los proyectos adquieren más importancia, la investigación sobre la proyectificación de la sociedad se ocupa más del cambio social e institucional a nivel macro. Las otras dos formas de proyectificación, como estado humano y cuestión filosófica, sólo han recibido atención en los últimos años, abordando aspectos intrigantes desde los efectos más micro de la proyectificación en el individuo hasta los efectos macro de la proyectificación en el desarrollo de la sociedad.

Las primeras publicaciones se centraron en el fenómeno de la proyectificación, sus causas y efectos (Kuura, 2020). Más tarde siguieron los estudios empíricos (Schoper et al., 2017), pero relacionados principalmente con la economía en determinados países. En todos los estudios se pudo demostrar que la proyectificación en la economía ya está relativamente avanzada y sigue en claro aumento. En dichos estudios se pusieron en evidencia diferencias interesantes entre el desarrollo en los distintos países e industrias. La investigación sobre la proyectificación desde una perspectiva no sólo económica se ha llevado a cabo hasta ahora únicamente en unos pocos trabajos de investigación. Wagner et al. (2021: 10) destacan que "la proyectificación de la sociedad está cobrando importancia y matizándose cada vez más".

Un estudio empírico realizado en Alemania en 2021 muestra claramente las diferencias entre la influencia de la proyectificación de la economía en comparación con otros ámbitos de la sociedad (véase la figura 2). Tanto el sector público como el ocio, el deporte, las artes, la cultura y el compromiso cívico van a la zaga de la economía, aunque la difusión de proyectos en ellos también ha sido notable en los últimos años y se espera que siga creciendo en el futuro.
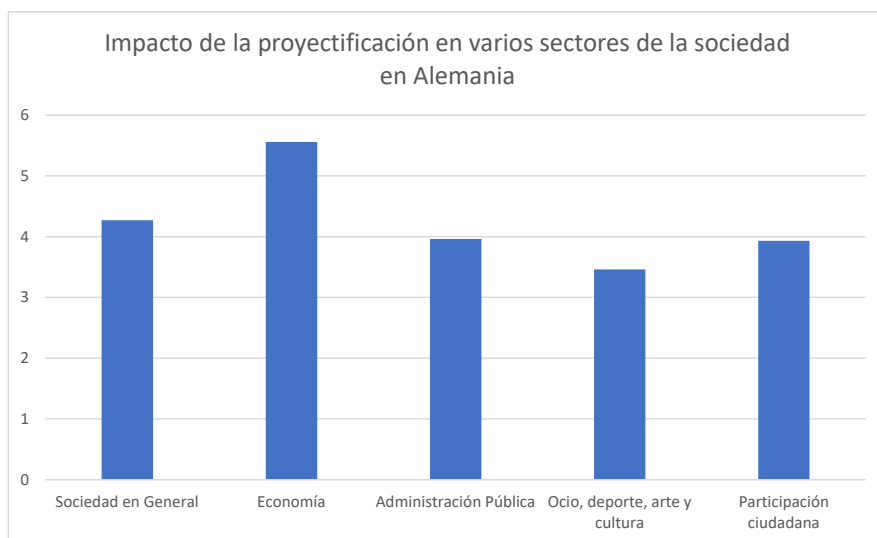
Figura 2:Proyectificación de la sociedad. Valor 0 (ningún impacto) 7 (muy alto impacto). (Wagner et al., 2022)

Lundin et al. (2015) sostienen que la generalización de los proyectos en la sociedad se debe a que los enfoques exitosos de la economía también se están adoptando en otros ámbitos de la sociedad. Uno de los argumentos es que los proyectos son conocidos por ser una forma eficiente y eficaz de lograr resultados, lo cual es deseable también en otros sectores. Incluso esbozan el camino hacia una sociedad de proyectos. Jensen et al. (2016: 22) argumentan en la misma línea, basándose en conceptos clásicos de la filosofía para describir los proyectos como una "condición humana" que tiene un "impacto duradero en nosotros como individuos y sociedad." En la sociedad de proyectos, argumentan los autores, los proyectos determinan lo que hacemos, desde cuándo hasta cuándo lo hacemos, dónde y con quién. Así, el tiempo, el espacio, la actividad y las relaciones determinan nuestras vidas como individuos, como comunidad y como sociedad en su conjunto. Filósofos como Sartre establecen un vínculo directo entre el impulso humano de autorrealización y el compromiso, que se orienta hacia la configuración del futuro a través de proyectos y, por tanto, es en última instancia una expresión de nuestra libertad (Crittenden, 2014). Con las actividades de proyecto, "se descubre el acto fundamental de la libertad; y es éste el que da sentido a la acción particular que puedo ser llevado a considerar. Este acto constantemente renovado no es distinto de mi ser; es una elección de mí mismo en el mundo y por la misma razón es un descubrimiento del mundo" (Sartre, 1984: 594).

Sin embargo, Jacobsson y Söderholm (2022: 315) sostienen que la imagen de la sociedad del proyecto cambia los supuestos ontológicos sobre los individuos

que actúan. A saber, de un 'homo economicus' que actúa racionalmente con pleno conocimiento de las alternativas disponibles para la toma de decisiones a un 'homo projecticus' centrado en proyectos, que se guía por la noción de que "la vida está organizada dentro de múltiples contextos temporales que se suceden y existen en paralelo".

Este flujo continuo de proyectos temporales también lleva a las personas a relacionarse con personas siempre nuevas, que realizan un proyecto juntas, luego se dispersan de nuevo y posiblemente vuelven a encontrarse en otro proyecto. Jensen (2012) utiliza la metáfora de un baile para describir la sociedad de proyectos, en la que las personas se encuentran una y otra vez en forma de proyectos, en diferentes momentos, en diferentes lugares y a través de diferentes formas de relación. Estas relaciones se forman a través de las actividades de los proyectos y pueden incluso profundizarse a largo plazo. Para Boltanski y Chiapello (2018: 104), esto es incluso constitutivo de la sociedad de proyectos: "El proyecto es la ocasión y la razón de la conexión. Reúne temporalmente a un grupo muy dispar de personas, y se presenta como una red de trabajo activada durante un período de tiempo que es relativamente corto, pero permite la construcción de vínculos más duraderos que quedarán en suspenso mientras permanezcan disponibles."

Por tanto, para comprender mejor y dar forma al desarrollo de la proyectificación en nuestra sociedad, es necesario examinar las distintas facetas de la proyectificación, empezando por los individuos, pasando por el tejido social de los numerosos participantes en el contexto de proyectos dentro de una misma organización, hasta llegar a la sociedad en su conjunto.

4. Perspectivas multifacéticas de la proyectificación

Aunque la proyectificación se ha analizado muchas veces en la investigación y se ha descrito en la bibliografía desde distintos ángulos, aún no está claro cómo se produce exactamente el proceso de proyectificación, qué actores participan en él y qué factores fomentan u obstaculizan este proceso (Wagner et al., 2021). Por este motivo, a continuación se examinarán más detenidamente tres perspectivas de la proyectificación, a saber, la de los individuos que, como actores clave en los proyectos y a través de ellos, impulsan la proyectificación. A continuación, desde la perspectiva de la sociología, cómo colaboran estos actores en la red de proyectos. Por último, todo ello se complementará con la teoría institucional y cómo el trabajo institucional da forma a la proyectificación de la sociedad.

5. La perspectiva del individuo

Mientras que antes de la revolución industrial los héroes (en su mayoría hombres) de los proyectos estaban en el centro de las narraciones populares, posteriormente las personas que actuaban fueron desapareciendo del foco de atención. La

gestión, con su planificación detallada y su sofisticado control, debía garantizar que los resultados deseados se alcanzaran de la forma más eficiente posible dentro de los plazos, presupuestos y requisitos de calidad prescritos. Las personas implicadas en el proyecto debían cumplir fielmente tanto las especificaciones como las instrucciones de los directivos superiores. Los proyectos en la industria se describen a menudo como la única alternativa para tareas complejas en un entorno estrictamente jerárquico basado en la división del trabajo. Sin embargo, recurriendo a Foucault (1977), el régimen de planificación y control en la gestión de proyectos recuerda más bien a estar disciplinado y no al trabajo autodeterminado. Curiosamente, son precisamente estos mecanismos organizativos los que se siguen utilizando en muchos proyectos hoy en día. No dan a las personas mucha autonomía a la hora de realizar sus tareas. Sin embargo, sin esta autonomía será difícil realizar tareas novedosas y exigentes (Lindgren y Packendorf, 2006).

No sólo los requisitos actuales de los proyectos, sino también las necesidades de las personas a la hora de contribuir a los proyectos, ya sea en la economía o en la sociedad civil, demuestran claramente que es poco probable que este tipo de imposición disciplinaria produzca el éxito deseado. La sociedad de proyectos necesita personas con iniciativa. Las descripciones del mundo del arte muestran una imagen menos racional, pero sobre todo emocional, de la participación en proyectos. Bayly (2013: 162), por ejemplo, escribe que "el proyecto en sí ha proliferado como el modo básico de trabajo productivo hasta el punto de que se ha convertido en un principio organizador de la vida y el trabajo, de la vida como un trabajo" y continúa afirmando que "los aspectos esenciales de la autorrealización y la relación social en los proyectos pueden ser vistos como parte de estos desarrollos." Dos características esenciales desempeñan un papel importante en la creación de proyectos artísticos, a saber, el tiempo y el espacio. Un proyecto denomina una "actitud temporal o modo temporal, donde la finalización ya está implícita en la proyección del futuro.... en el tiempo proyectivo en el que los artistas se mueven a través de proyectos realizados y muchos no realizados, tienen que imaginar constantemente el futuro aún por venir" (Kunst, 2012: 65). Para la mayoría de los artistas el espacio del proyecto se convierte en un lugar de interacción, "una interfaz entre lo abstracto y lo concreto, el arte y la ciencia, lo material y lo intangible, lo mental y lo físico y, en última instancia, lo humano y lo inhumano." (Gratton y Sheringham, 2005: 15).

El espacio (temporal) del proyecto también sirve a los artistas para desincronizarse del mundo que les rodea, para autoimponerse un aislamiento con el fin de centrarse por completo en el acto creativo, porque "todo proyecto parecería prosperar únicamente con la esperanza de su resincronización con la marcha general de las cosas. El proyecto se considera un éxito si esta resincronización consigue orientar el curso de las cosas en la dirección deseada. Y se considera un fracaso si el curso de las cosas no se ve afectado por la realización del proyecto" (Groys, 2010:80).

Por ejemplo, un grupo activista llamado "La Última Generación" intenta actualmente llamar la atención de los gobernantes sobre la contaminación ambiental con acciones espectaculares, como manchar cuadros en museos o bloquear carreteras, y mostrar lo importante que es actuar con rapidez. A los activistas no les interesa destruir obras de arte o paralizar el tráfico, sino concienciar a los políticos de las consecuencias del cambio climático. La proyectificación de nuestra sociedad se ve así impulsada por estas actividades que han sido elegidas por los propios individuos. Estas actividades crean un potencial no imaginado para hacer avanzar nuestra sociedad. "La Sociedad de Proyectos se parece más a una dinamo: es la actividad la que abre el espacio, el tiempo y las relaciones, y cuando la actividad se detiene, el espacio se apaga, el tiempo se apaga y las relaciones se detienen" (Jensen et al., 2017: 4).

Queda por tratar la cuestión de qué necesidades tienen los individuos y cómo los proyectos pueden ayudar a satisfacerlas. La Teoría de la Autodeterminación (TAD) aporta ideas interesantes y "sugiere que tanto el rendimiento de los empleados como su bienestar se ven afectados por el tipo de motivación que tienen para sus actividades laborales" (Deci et al., 2017: 20). En la TAD se mencionan tres necesidades esenciales de los individuos. La primera es tener la mayor autonomía posible en la ejecución de las actividades, lo que debe fomentar el autoapoyo y la apropiación. En segundo lugar, se trata de actuar con competencia y así ser eficaz y reconocido por los demás. Por último, los individuos también quieren experimentar una cierta relación a través de sus actividades, en las que por un lado sientan un sentimiento de pertenencia e implicación, pero por otro lado también les gustaría ser capaces de proporcionar este sentimiento a los otros individuos implicados (Ryan y Deci, 2017).

En la visión de Boltanski y Chiapello de una 'Projective Cité' (2018), los proyectos proporcionan la autonomía necesaria para que los individuos aporten su experiencia y se autorrealicen colectivamente con los demás. La vida se entiende como una secuencia continua de proyectos dedicados a aspectos muy diferentes de la existencia. En este proceso, las fronteras entre trabajo, ocio y voluntariado también se difuminan. A esta visión más bien eufórica pueden añadirse también perspectivas críticas. Al menos en una perspectiva a corto y medio plazo, la planificación y el control habituales en los proyectos para garantizar la consecución de los objetivos no pueden descartarse tan rápidamente. "El yo proyectificado... es conflictivo: se apoya en la autonomía y sin embargo se disuelve, pero manteniendo esta tensión ambivalente, el régimen proyectificado produce una estructura de poder y constituye *una oscura antinomia de previsibilidad y flexibilidad*" (Kalff, 2017: 21). Una posible autoexplotación, un abuso del individuo para los fines de un proyecto o la incertidumbre de lo que sigue a un proyecto son aspectos a los que hay que prestar especial atención desde la perspectiva del individuo y de la sociedad (Jensen et al., 2016). En la sociedad de proyectos, los individuos pueden autorrealizarse

de diversas maneras para enriquecer sus vidas con una secuencia de proyectos. Sin embargo, también deben dedicar una buena cantidad de energía a estos proyectos, comprometerse continuamente con ellos y demostrar adaptabilidad (Barondeau y Hobbs, 2019). En una sociedad proyectizada, los individuos participan en un tejido de proyectos muy unido y contribuyen a evitar que ese tejido se deshaga.

6. La perspectiva sociológica

En la literatura sobre gestión de proyectos, el compromiso social ha tendido a estar representado hasta ahora sólo por la gestión sistemática de las partes interesadas. El hecho de que la causa, el propósito y el factor determinante de los proyectos tengan un origen social puede observarse mejor en el desarrollo comunitario. Los proyectos surgen de la comunidad con la intención de mejorar el estado de la comunidad en su conjunto o en un aspecto concreto mediante la acción colectiva. Esto ocurre en el contexto específico (incluidas las relaciones de poder, la historia, la cultura) y en el marco de los objetivos autoimpuestos con los recursos disponibles (Cicmil y O'Laocha, 2016). Los gestores de proyectos no se entienden en este contexto como instrumentos de la gestión más eficiente del proyecto hacia un objetivo predeterminado, sino como facilitadores de la interacción social. Más bien son vistos en la sociedad de proyectos como facilitadores, entrenadores o intermediarios para ayudar a las personas a trabajar en red en el contexto de un proyecto, estableciendo "la colaboración entre personas de diferentes disciplinas o profesiones, pertenecientes a diversos departamentos, instituciones o empresas" (Boltanski y Chiapello, 2018: 117).

Desde una perspectiva sociológica, los proyectos pueden entenderse como redes complejas, en gran medida autoorganizadas, de individuos que desean comprometerse con una causa común y lo hacen por motivación intrínseca y no porque se vean obligados a ello. En la sociedad hay, sin duda, suficientes campos de actividad, desde el micronivel del entorno social inmediato (por ejemplo, la familia y los amigos, así como la comunidad) hasta las distintas organizaciones o instituciones sociales (por ejemplo, los partidos políticos, la Iglesia y las instituciones de bienestar), pasando por las instituciones estatales o públicas de carácter general.

La compleja interacción entre proyectos, personas e instituciones en una esfera social también se denomina en la literatura "Ecologías de proyecto". "Este espacio relacional abarca capas sociales en múltiples escalas, desde el nivel micro de las redes interpersonales hasta el nivel meso de la colaboración intra e interorganizacional y el nivel macro de entornos institucionales más amplios" (Grabher e Ibert, 2012: 176). Además de las organizaciones profesionales de los sectores público y privado, existen redes personales latentes que pueden utilizarse para resolver tareas difíciles en forma de proyectos. Por ejemplo, expertos en gestión de proyectos del mundo empresarial se reúnen en el marco de una asociación de gestión de pro-

yectos y elaboran colectivamente normas nacionales o internacionales de gestión de proyectos. O se ponen en marcha proyectos sociales para la integración de refugiados (Wagner, 2018). "Aparentemente, los proyectos operan en un entorno de colaboración recurrente que, tras varios ciclos de proyecto, llena una reserva de recursos y se "gelifica" en redes latentes... Tales cadenas de cooperación repetida se mantienen unidas (o se cortan) por la reputación que los miembros ganan (o pierden) en colaboraciones anteriores" (Grabher, 2002: 208).

De esta manera se describe la interacción entre la colaboración sólo temporal en el proyecto y las oportunidades de colaboración más duraderas que se extienden más allá. Los proyectos posibilitan más proyectos al generar y ampliar la confianza entre los agentes, que pueden asociarse repetidamente y aportar las capacidades adquiridas en proyectos anteriores para iniciar otros nuevos. La comunalidad y la conectividad en redes o comunidades fomentan los proyectos y, en última instancia, alimentan la proyectificación de la sociedad.

Jensen (2012) afirma que en la sociedad de proyectos, el poder importa cada vez menos. Por tanto, los proyectos no los impone alguien de arriba y luego los ejecutan empleados o contratistas; en su lugar, la persona que primero toma la iniciativa da el primer paso y reúne suficientes seguidores para materializar la idea es la que realmente impulsa el proyecto. El objetivo principal es, por tanto, convencer a los demás para que se unan al proyecto. Utilizar una estrategia de "tirar" en lugar de "empujar". Por ejemplo, crear una visión compartida del proyecto, destacar los puntos en común en cuanto a los objetivos y hacer hincapié en la finalidad del proyecto puede ser útil para lograr la alineación y el compromiso de los participantes (van der Hoorn y Whitty, 2017).

La proyectificación de la sociedad describe así la creciente incrustación de los proyectos en las estructuras sociales de la sociedad. Los proyectos se entienden como parte de la transformación de la sociedad que pretende resolver los retos actuales y mejorar la vida de la humanidad en general (Jacobsson y Jalocha, 2021). Esto va mucho más allá de la transformación de las estructuras corporativas de Christophe Midler en el caso de Renault. Packendorff y Lindgren (2002) sostienen que es necesario adoptar aquí una visión mucho más amplia, que considere la proyectificación como un fenómeno cultural y discursivo, y los proyectos como respuestas habituales, legítimas y performativas a los retos contemporáneos. Desgraciadamente, el proceso de proyectificación en el ámbito de la sociedad todavía se conoce muy poco, y la investigación sobre el tema es muy reciente (Wagner et al., 2022). Por lo tanto, aún quedan muchas preguntas sin respuesta: ¿Quiénes son los actores de la proyectificación? ¿Qué avances ha logrado la proyectificación en diferentes sociedades? ¿Qué condiciones marco son favorables y cuáles perjudiciales? Por último, queda por investigar cuál es el lado oscuro de la proyectificación en nuestra sociedad (Locatelli et al., 2022).

7. LA PERSPECTIVA INSTITUCIONAL

Los actores implicados en la gestión de proyectos trabajan en un entorno social que se ve afectado por normas, valores y reglas sociales que es necesario comprender si se quiere analizar el proceso de proyectificación en la sociedad. La teoría institucional se considera fundamental para explorar y comprender el proceso de proyectificación (Wagner et al., 2021). La teoría aborda "las cuestiones fundamentales del orden social, el cambio social y la construcción de sistemas de significados compartidos" (Scott, 2012: 29). El comportamiento en una parte de la sociedad puede ser fundamentalmente diferente del comportamiento en otra parte de la sociedad si, por ejemplo, sus circunstancias regulativas, normativas o culturales-cognitivas son diferentes (Scott, 2014). Por ejemplo, en algunos países de Europa existen normas legales que obligan a los gestores de proyectos a poseer un certificado de gestión de proyectos para poder ser asignados a un proyecto público. En otros países, existen requisitos claros para la adopción de normas y estándares de gestión de proyectos que deben tenerse en cuenta durante la ejecución del proyecto. Si no se aplican, el director de proyecto se expone a la acusación de no actuar profesionalmente, lo que -dependiendo del contexto- también puede tener consecuencias jurídicas. Por último, también es importante tener en cuenta las condiciones culturales-cognitivas del entorno social. Por ejemplo, el entorno cultural-cognitivo para la ejecución de proyectos en el sector público alemán difiere significativamente del sector privado. El primero se orienta hacia la estabilidad a largo plazo y el trabajo rutinario, mientras que el segundo se entusiasma con la realización eficaz de proyectos de cambio complejos e invierte mucho tiempo y dinero en la profesionalización del personal de proyectos.

La investigación hasta la fecha ha concluido que son principalmente las instituciones regulativas y normativas las que ejercen el mayor impacto en el avance de la proyectificación en la sociedad (Wagner et al., 2021). Esto se atribuye a la coerción que las instituciones reguladoras, con sus posibles sanciones, ejercen sobre los agentes. Aunque las instituciones normativas no tienen por qué tener llegada a determinados entornos sociales, en un entorno profesional, como en la ejecución de proyectos con escasos recursos, existe la opinión de que es mejor aplicar normas y estándares para tener éxito. Esto ilustra la inercia de un entorno social o, en otras palabras, sus "fuerzas isomórficas". "Si todo el mundo sigue el mismo modelo de organización, se proporciona a los actores una solución que establece una asunción de la forma en que deben comportarse las organizaciones" (Sydow y Söderlund, 2023: 89). Esto contrasta claramente con las características de una sociedad de proyectos descritas anteriormente, en la que un proyecto no está impulsado por "la imposición de disciplina al profesional" (Hodgson, 2002) mediante la coerción y la instrucción, sino por la necesidad de autorrealización de los actores. A través de los proyectos, las propias instituciones pueden convertirse en el objetivo del cambio,

por ejemplo, mediante el proyecto que da forma a una historia o narrativa de éxito que es adoptada por otros proyectos, difundiendo y guiando así la acción en otros casos (Söderlund y Sydow, 2019).

Por ejemplo, el análisis del papel de la Asociación Alemana de Gestión de Proyectos (GPM) en Alemania para la proyectificación en la sociedad ha demostrado que la asociación ni tiene una influencia directa en la proyectificación ni ha tenido éxito con sus esfuerzos anteriores por "impulsar" la proyectificación a través de actividades normativas y reguladoras. Esto sólo puede lograrse indirectamente, moldeando positivamente la percepción cultural-cognitiva de los proyectos, por ejemplo, reconociendo los proyectos de éxito mediante un premio (Wagner et al., 2022). Esto también se aplica a la imitación del comportamiento empresarial, como en el ejemplo del desarrollo innovador y extremadamente rápido de la vacuna Covid-19 por parte de la empresa alemana Biontech (Miller et al., 2021). Así pues, para seguir proyectificando la sociedad, se necesitan relatos y modelos de éxito que puedan llamar la atención del público y, de este modo, se influya positivamente en el comportamiento de los demás agentes del proyecto. Los intermediarios, como las asociaciones de gestión de proyectos, los educadores, los formadores, los consultores y otros, también pueden influir en el sentimiento positivo hacia los proyectos (Boltanski y Chiapello, 2018).

8. Conclusiones

Hasta ahora, la investigación y la literatura se han ocupado principalmente de la proyectificación de las organizaciones y menos de la perspectiva sociológica. Sin embargo, esta perspectiva es cada vez más necesaria, dados los múltiples retos de nuestra sociedad y la incapacidad de los estados e instituciones para resolverlos por sí solos. Basándose en disciplinas como la psicología, la sociología y la filosofía, hasta ahora poco mencionadas en la bibliografía pertinente, el capítulo demuestra que éstas también tienen un importante papel que desempeñar. Numerosas fuentes demuestran que los proyectos también se entienden como una forma contemporánea de actividad, lo que abre perspectivas completamente nuevas que se alejan de la literatura tradicional sobre gestión de proyectos. Aunque estudios aún no presentan un enfoque programático ni un concepto coherente, queda claro que existen numerosas referencias a la realización de proyectos también desde una perspectiva sociológica. Sin embargo, en este contexto los proyectos no se entienden tanto como la ejecución eficiente de un encargo, como ocurre en el ámbito empresarial, sino más bien como una empresa que surge de la determinación de una persona por autorrealizarse y que se ejecuta en el tiempo y el espacio para alcanzar el objetivo autoimpuesto, ya sea en solitario o en conjunto. Al mismo tiempo, se plantea la cuestión de quién puede hacer qué para promover el proceso de proyectificación en la sociedad. Recurriendo a la teoría institucional, se ha descrito que la necesidad de

las personas de llevar a cabo proyectos no se consigue tanto mediante un "empuje" de las instituciones reguladoras o normativas, sino sobre todo mediante un "tirón" de las narrativas cargadas de positividad y los modelos de proyectos exitosos.

En el futuro, la investigación en este campo deberá explorar con más detalle esta interrelación y ofrecer orientaciones a los profesionales y a los responsables de la toma de decisiones en todos los niveles de la sociedad. El trabajo conjunto y fructífero entre las disciplinas aquí mencionadas es también una tarea que la investigación deberá seguir abordando en el futuro. Existen analogías apasionantes en el tratamiento del tema y mucho que aprender unos de otros. También podría ser tarea importante de las asociaciones profesionales de gestión de proyectos facilitar el intercambio entre disciplinas, sectores sociales y países. Al fin y al cabo, una cosa está cada vez más clara: los proyectos son una parte fundamental de nuestras vidas, de nuestra sociedad, y contribuyen a forjar nuestro futuro.

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Sobre el autor

Reinhard Wagner lleva más de 35 años trabajando en el ámbito del liderazgo relacionado con proyectos en los sectores privado, público y civil. Como director general de Tiba Group Services GmbH, una consultoría líder en gestión de proyectos con sede en Múnich/Alemania, ayuda a los ejecutivos de sus clientes a transformar sus empresas en organizaciones orientadas a proyectos, adaptables y de éxito sostenible. Ha publicado 40 libros y varios cientos de artículos y entradas de blog en el ámbito de la gestión de proyectos. En sus más de 25 años de compromiso voluntario, ha desempeñado diversas funciones directivas en la Asociación Alemana de Gestión de Proyectos (GPM) y en la Internacional Project Management Association (IPMA) (incluidas las de Presidente y Director) y, por su compromiso internacional, ha sido nombrado Miembro Honorario de la IPMA y de varias de sus asociaciones miembros. Reinhard es Profesor Asistente en la Universidad Europea Alma Mater y enseña gestión de proyectos en el Programa de Estudios de Doctorado en Gestión de Proyectos.

CAPÍTULO 8

Cuestiones clave en la gestión
de la organización basada en proyectos[*]

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Resumen

En el pasado he intentado desarrollar un modelo exhaustivo de cómo gestionar la organización basada en proyectos dentro de la sociedad proyectificada. Mi investigación ha desarrollado elementos esenciales para la gestión de la organización basada en proyectos. En este capítulo describo varios elementos. Hago una breve historia del desarrollo del pensamiento sobre su contribución a la proyectificación y una breve reseña de su aportación.

1. La gestión de la organización basada en proyectos

Hay muchas palabras que se utilizan para describir a las organizaciones que realizan una parte importante de su trabajo en forma de proyectos (Miterev, Mancini &Turner, 2017). Anne Keegan y yo utilizamos la expresión "organización basada en proyectos" (Turner y Keegan, 2000, 2001), mientras que en el trabajo que hemos realizado con Martina Huemann (Huemann, Keegan y Turner, 2007) utilizamos la expresión "organización orientada a proyectos". Podemos diferenciar entre ambas (Miterev, Mancini &Turner, 2016). La basada en proyectos es ascendente. El trabajo que una organización realiza para sus clientes la obliga a adoptar formas de trabajo basadas en proyectos como sus principales procesos empresariales; está basada en proyectos a la fuerza. Por otro lado, la orientación a proyectos es descendente. La organización toma la decisión estratégica de adoptar la gestión de proyectos como forma de hacer negocios y de adoptar una cultura de proyectos;

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[*] Se ha respetado el estilo de redacción en primera persona del autor, ya que el capítulo recapitula todas sus investigaciones relacionadas con la gestión de proyectos.

está orientada a proyectos por elección. Ambas deberían encontrarse en un punto intermedio; una organización basada en proyectos debería elegir estar orientada a proyectos, y una organización sólo debería elegir estar orientada a proyectos si está basada en proyectos. Sin embargo, no siempre es así.

Anne Keegan y yo, en los artículos que figuran en el Cuadro 1, nos fijamos el objetivo de desarrollar una teoría integral para la gestión de la organización basada en proyectos. En realidad, desarrollamos teorías para muchos elementos (Tabla 1), pero la teoría global se nos escapó. Maxim Miterev y yo, (con la ayuda de Mauro Mancini), hemos retomado el desafío, (Miterev, Turner & Mancini, 2017; Turner & Miterev, 2019). A continuación, cubro elementos del modelo, dando una breve historia, y a veces una mayor explicación.

Tabla 1: Elementos de la teoría de la gestión de la organización basada en proyectos

Elemento	Referencia
Gobernanza	Turner & Keegan (1999, 2001)
Control operativo	Turner & Keegan (1999, 2000)
Aprendizaje	Keegan & Turner (2001)
Innovación	Keegan & Turner (2002)
Gestión de recursos humanos	Keegan & Turner (2000)

2. Gobernanza

La primera vez que vi las palabras gestión de proyectos y gobernanza juntas en la misma frase fue en artículos míos y de Anne Keegan (1999, 2001). En aquella época se escribía mucho sobre gobernanza en la literatura general sobre gestión y era natural que quienes investigaban la gestión de proyectos se preguntaran si era relevante en nuestro campo. Estoy bastante seguro de que David Shannon, que fundó el Grupo de Interés Especial en la Gobernanza de la Gestión de Proyectos de la Asociación para la Gestión de Proyectos, llegó a la idea al margen de mí (Association for Project Management, 2004). Al igual que Leibniz y Newton, que inventaron el cálculo de forma independiente, la personas trabajan en el contexto de un mismo debate y llegan por separado a la misma idea. Yo llegué a la gobernanza porque pensaba que un efecto que Anne Keegan y yo habíamos observado era una problemática de costes de transacción. Susan Foreman (1996) me había introducido en el análisis de los costes de transacción. Leí los libros de Oliver Williamson (1995, 1996) y dieron como resultado los artículos míos y de Anne Keegan (1999, 2001).

Más tarde me di cuenta de que el trabajo que hice con Reza Peymai (Turner & Peymai, 1995) se refería a la gobernanza. Nos dimos cuenta de que la gobernanza

difería según se tratara de suministros rutinarios o de proyectos. En el suministro rutinario, para las transacciones externas (mercados), la estructura de gobierno se alinea con la transacción, pero para las transacciones internas la estructura de gobierno se alinea con la organización perpendicular a la transacción (jerarquías) (Williamson, 1975). En los proyectos, la estructura de gobierno siempre está alineada con el proyecto, que es la transacción, tanto para el suministro interno como externo. Turner & Peymai (1995) lo habían observado efectivamente.

Roland Gareis ha dicho que no cree en la gobernanza de los proyectos. Dice que sólo se puede tener la gobernanza de una organización permanente. En mi escrito más reciente sobre la gobernanza de proyectos (Turner & Müller, 2017), me he ido al otro extremo. Me metí de lleno en la idea de la gestión organizativa de proyectos. Hay tres organizaciones principales implicadas en la gestión de proyectos: el inversor, el proyecto y el contratista. Las tres requieren gobernanza, al igual que las tres interfaces entre ellas (Turner & Müller, 2017). Anne Keegan y yo investigamos la gobernanza de la interrelación entre el inversor y el contratista (2001). El proyecto puede estar implicado en varias organizaciones más: la cartera de inversión anual en el inversor; un programa en el inversor; la cartera de trabajo en el contratista; y una red de proyectos. Todas requieren gobernanza (Turner & Müller, 2017).

2.1. *Relación entre el promotor y el contratista*

La tesis doctoral de Ralf Müller (2003) trataba de la comunicación entre el director del proyecto y el promotor, lo que nos llevó a considerar la relación promotor-contratista entre ambos (Turner & Müller, 2003, 2004). También comparamos los costes de transacción y los costes de agencia. Asistí a un taller sobre la investigación "Repensar la gestión de proyectos", organizado por la Universidad de Manchester. Stephen Ward, de la Universidad de Southampton, estaba escribiendo algo en un rotafolio y escribió las palabras "principal" y "agente". Se lo comenté después y me dijo que, en su opinión, las tres cuestiones más importantes de la gestión de proyectos eran el problema de la selección inadecuada, el problema del riesgo moral y la gestión del riesgo.

2.2. *Gestión de programas y carteras*

También he desarrollado investigaciones sobre la gestión de programas y carteras, Turner (2016). Yo no inventé la idea. Asistí al seminario de expertos de la IPMA sobre multiproyectos en 1988, que incluía una ponencia de David Ferns, publicada posteriormente en la revista International Journal of Project Management, (Ferns, 1991). Pero encendí una mecha que se consumía lentamente. Lo que hizo que la gestión de programas y carteras despegara en el Reino Unido y en Estados Unidos fue el trabajo de un Grupo de Interés Especial dirigido conjunta-

mente por la Association for Project Management y la British Computer Society. Ese SIG fue creado y dirigido inicialmente por Geoff Rees. Geoff me dijo una vez que mi artículo (Turner & Speiser, 1992) le animó a fundar el SIG. Dijo que se dio cuenta de que era un tema importante que nadie estaba investigando. Ahora se reconoce la importancia de la gestión de programas y carteras para ayudar a las organizaciones a alcanzar sus objetivos estratégicos (Koch & Gemünden, 2023; Vadake, 2023).

3. Comportamiento organizativo

A principios de este año, escribí un ensayo para la revista International Journal of Project Management sobre 40 años de investigación sobre el comportamiento organizativo en la gestión de proyectos (Turner, 2022).

3.1. *Liderazgo*

Hasta que Ralf Müller y yo investigamos el liderazgo de proyectos a mediados de la década de 2000, la literatura sobre el éxito de los proyectos ignoraba sistemáticamente al gestor de proyectos como factor de éxito en los proyectos (Turner & Müller, 2005). Se elaboraron listas de factores de éxito que no incluían la competencia del gestor de proyectos. La más famosa es la de Pinto y Slevin (1988). Una vez pregunté a Jeffrey Pinto al respecto y me dijo que su metodología consistía en entrevistar a los gestores de proyectos, y que la mayoría de ellos eran demasiado modestos para mencionarse a sí mismos como factores de éxito en sus proyectos. Jim Johnson (2006) sí incluye la competencia del gestor de proyectos como uno de los 10 factores de éxito.

Ralf Müller y yo (2007a) investigamos cómo influye el estilo de liderazgo del director de proyecto en el éxito del proyecto con varios objetivos:

1. Determinar si la competencia del director del proyecto es un factor de éxito en los proyectos;
2. Determinar si el estilo de liderazgo del director de proyecto influye en el éxito del proyecto;
3. Determinar si varía en función del tipo de proyecto;
4. determinar si los jefes de los jefes de proyecto tienen en cuenta la competencia y el estilo de liderazgo del jefe de proyecto a la hora de nombrar a los jefes de proyecto.

Encontramos varios resultados clave: La competencia del director de proyecto y, en particular, su estilo de liderazgo influye en el éxito del proyecto. Utilizamos un modelo de liderazgo compuesto por tres competencias de liderazgo: inteligencia emocional, competencia directiva y competencia intelectual (Dulewicz &

Higgs, 2005). Las tres competencias comprendían 15 habilidades. En la mayoría de los proyectos, la inteligencia emocional del director de proyecto influye en el éxito. Aunque se trata de un hallazgo esperable, fuimos los primeros en aportar evidencias. Posteriormente, otras personas investigaron la inteligencia emocional del gestor de proyectos. Sin embargo, también descubrimos que en los proyectos en los que el coste es importante, la competencia de gestión del director de proyecto influye en el éxito. De las 15 competencias de nivel inferior, distintos perfiles de estas eran importantes en distintos tipos de proyectos. La comunicación y la concienciación eran importantes en muchos proyectos. Recibimos 400 respuestas a nuestra encuesta y Dulewicz y Higgs recibieron 1.000 respuestas de directores generales, por lo que pudimos comparar a los directores de proyectos con los directores generales (Turner, Müller & Dulewicz, 2009). Descubrimos que los jefes de proyecto eran más concienzudos que los directores generales (en media desviación estándar), pero menos buenos en comunicación (en un cuarto de desviación estándar). En cuanto a los proyectos más complejos, los directivos intentaron adecuar la competencia del jefe de proyecto al proyecto. Pero volverá a surgir cuando hable de la gestión de los recursos humanos. Muchas organizaciones carecen de una estructura de carrera profesional para los jefes de proyecto, por lo que no tienen una forma lógica de adecuar el jefe de proyecto a los proyectos.

3.2. *Partes interesadas*

He intentado sustituir la gestión de las partes interesadas por el compromiso con las partes interesadas (Derakhshan & Turner, 2022; Turner, 2014). Hay un programa en la televisión británica llamado "Un hombre y su perro". Trata sobre pruebas con perros pastores. El pastor envía a su perro para que reúna a las ovejas, las haga hacer algunos ejercicios y, a continuación, las lleve a un corral, donde el pastor cierra la puerta. Creo que algunas personas ven la gestión de las partes interesadas de la misma manera: reunir a las partes interesadas, meterlas en una habitación, cerrar la puerta y luego ir a hacer el proyecto sin ellas. En cambio, deberíamos comprometernos con los interesados, presentarles el proyecto, hacer que lo acepten y que crean que el beneficio del proyecto para ellos es mayor que el valor que otorgan a su participación (Turner y Lecoeuvre, 2017). Huemann, Eskerod y Ringhofer (2016) hablan de gestión para los interesados frente a gestión de los interesados. "De" es meterlos en la habitación y cerrar la puerta. "Para" es desarrollar el proyecto para que sea beneficioso para las partes interesadas, consiguiendo así que acepten el proyecto y se comprometan con él (Turner y Lecoeuvre, 2017). Por lo general, "para" es lo correcto, pero en ocasiones "de" es lo correcto. También he intentado vincular el compromiso de las partes interesadas con el liderazgo (Derakhshan y Turner, 2022). El compromiso con las partes interesadas es, por supuesto, una función de liderazgo. Pero también he intentado mostrar

cómo la inteligencia emocional del gestor de proyectos puede mejorar la implica-
ción de los interesados (Turner, 2014).

3.3. *Ética*

Mi primera introducción a la ética en la gestión de proyectos fue cuando uno
de mis estudiantes de máster, Alistair Godbold, escribió su trabajo de fin de máster
sobre el tema (Godbold, 1999). Godbold, hoy en día, sigue dando charlas sobre
la ética en la gestión de proyectos. Ralf Müller, Jingting Shao, Erling Andesen y
Øvynd Kvalnes y yo (2014, 2016) hemos estado investigando la ética en las organi-
zaciones temporales, y la influencia de la estructura de gobierno. Los objetivos eran:

1. Determinar la naturaleza de los problemas éticos a los que se enfrentan
   los directivos en las organizaciones temporales, incluidos los proyectos y
   programas;
2. Determinar cómo influye la naturaleza de la estructura de gobernanza en la
   naturaleza de los problemas éticos a los que se enfrentan y en la forma en
   que los gestores de proyectos responden a ellos.

El modelo de la estructura de gobernanza que utilizamos es uno desarrollado
por Ralf Müller (2009), basado en dos dimensiones, si la organización controla por
comportamiento u objetivos, y si la organización tiene una orientación accionarial
o de partes interesadas. Identificamos que los tres principales problemas éticos a
los que se enfrentan los gestores de proyectos son:

1. Cuestiones de optimización: ¿optimiza el proyecto para el cliente o para el
   contratista?
2. Problemas de transparencia: se miente sobre los progresos.
3. Problemas de relación: los miembros del equipo del proyecto tienen rela-
   ciones inapropiadas con otras partes interesadas.

Descubrimos que la naturaleza de la estructura de gobierno influye en la
naturaleza de los problemas éticos encontrados. Cuando las organizaciones con-
trolan por resultados, el personal está motivado para inflar los avances. Cuando las
organizaciones se centran en los accionistas, el director de proyecto está motivado
para optimizar el proyecto para su organización y no para el cliente. Cuando la
organización controla en función de los resultados con un enfoque centrado en las
partes interesadas, es menos probable que el director del proyecto busque ayuda,
pero sí la buscará en el comité de dirección. Cuando la organización controla en
función de los comportamientos y se centra en los accionistas, es más probable
que el gestor del proyecto busque ayuda, pero la solicitará a su supervisor. Cuando
la organización se centra en las partes interesadas, los usuarios finales son la parte

interesada clave y existe una mayor confianza entre el equipo del proyecto y las partes interesadas externas. Cuando la organización se centra en los accionistas, el patrocinador, que representa a los accionistas, es la parte interesada clave y hay menos confianza entre el equipo y las demás partes interesadas.

3.4. *Gestión de recursos humanos*

La atención a la gestión de los recursos humanos surgió de forma natural en el trabajo que Anne Keegan y yo realizamos a finales de la década de 1990 (2000). Como he dicho antes, nuestro objetivo era desarrollar un modelo integral para la gestión de la organización basada en proyectos. Eso se nos escapó, pero identificamos los cinco elementos clave enumerados en la tabla 1, e identificamos cómo debían gestionarse esas cinco cosas. Sin embargo, no pensábamos que hubiésemos identificado lo suficiente las prácticas de gestión de recursos humanos como para escribir un artículo académico, hasta que nos asociamos con Martina Huemann. Con Martina Huemann, llevamos a cabo un proceso de cuatro etapas para investigar la Gestión de Recursos Humanos en la organización orientada a proyectos. Realizamos una revisión bibliográfica (Huemann et al., 2007), seguida de dos rondas de entrevistas y una serie de estudios de casos (Huemann, Turner y Keegan, 2004). Identificamos una serie de cuestiones clave:

1. Los directores de proyecto, los directores de línea y los directores de recursos humanos tienen la responsabilidad de la Gestión de Recursos Humanos en las organizaciones orientadas a proyectos. La Gestión de Recursos Humanos está cada vez más extendida y conectada en red, abarcando tanto la parte permanente como la parte temporal de la organización. No solo los gerentes de línea asumen tareas de Gestión de Recursos Humanos, sino también los Gerentes de Proyecto, (Keegan, Huemann & Turner, 2012).

2. En una organización matricial, el individuo es asignado desde la organización de línea al proyecto. La Gestión de Recursos Humanos debe practicarse tanto en la línea como en el proyecto. La línea es responsable de la incorporación del individuo a la organización, la evaluación, la recompensa y el desarrollo en la misma, y su salida de la organización. El proyecto es responsable de asignar al individuo al proyecto, la evaluación, el desarrollo y la recompensa en el proyecto, y la salida del proyecto. La evaluación, el desarrollo y la recompensa más importantes suelen tener lugar en la línea, ya que la organización necesita centrarse en una escala temporal más larga que el proyecto para el desarrollo de la carrera del individuo y el desarrollo de la capacidad organizativa. Sin embargo, la evaluación del proyecto es importante y las organizaciones deben asegurarse de que la evaluación de la línea se basa en las evaluaciones del proyecto. Las recompensas y el desarrollo en el proyecto tienden a ser específicos del proyecto. Es importante que los dos

conjuntos de prácticas de gestión de recursos humanos sean coherentes y se apoyen, lo que significa que las prácticas en la línea deben adaptarse a partir de las utilizadas en las organizaciones de gestión clásica, y las prácticas en el proyecto deben desarrollarse para apoyar a la línea (Huemann, Turner y Keegan, 2004).

3. A medida que las personas son liberadas del proyecto y de la organización de línea, es necesario captar sus conocimientos (Turner & Keegan, 2004).

4. El tratamiento ético de las personas es una cuestión importante en las organizaciones orientadas a proyectos (Turner, Huemann & Keegan, 2008). Si las personas trabajan en varios proyectos, puede resultar difícil equilibrar su carga de trabajo.

3.5. *Competencia, capacidad, aprendizaje e innovación*

Lynn Crawford hizo su doctorado sobre la competencia del gestor de proyectos (Crawford, 2001). Ella y yo hemos trabajado juntos en menor medida en la competencia de gestión de proyectos, pero sobre todo en la capacidad de gestión de proyectos de las organizaciones (Crawford & Turner, 2007). Anne Keegan y yo habíamos estudiado el aprendizaje y la innovación en organizaciones basadas en proyectos (Keegan & Turner, 2001, 2002). Identificamos que las prácticas estándar de gestión de proyectos tienden a limitar la innovación, con un fuerte enfoque en el control y el seguimiento de las normas. Identificamos ciertas trampas de competencia, por las que las prácticas de gestión de proyectos tienden a encerrar a las personas en las formas tradicionales de trabajar, en lugar de intentar cosas nuevas. El modelo estándar de aprendizaje en gestión consta de tres pasos: variación, selección y retención. Las personas prueban nuevas formas de trabajar, deciden cuáles conducen a un mejor rendimiento y las retienen en el repositorio de aprendizaje. En las organizaciones basadas en proyectos tiene que haber un cuarto paso, la distribución. La variación se produce en los proyectos, la retención en el repositorio central y la reutilización en otro proyecto. Esto crea una complejidad adicional para la gestión del conocimiento en las organizaciones basadas en proyectos (Turner y Keegan, 2004).

4. Contingencia

La gobernanza y el comportamiento organizativo son las dos vertientes principales de mi investigación. Una tercera vertiente se sitúa en el campo de la contingencia y la categorización. Hanisch & Ward (2012) me muestran como uno de los cuatro autores más significativos en la teoría de la contingencia en la gestión de proyectos. Un hito significativo en la investigación fue el trabajo sobre sistemas de categorización de proyectos con Lynn Crawford y Brian Hobbs, (Crawford, Hobbs & Turner, 2005, 2006).

4.1. *Objetivos y métodos*

Ralf Müller y Jingting Shao (2013) dijeron muy amablemente que mi artículo con Robert Cochrane (1993) inició el desarrollo teórico en la categorización de proyectos. Turner y Cochrane (1993) señalaron que los proyectos requieren distintos enfoques de gestión en función de lo bien definidos que estén los objetivos y los métodos para alcanzarlos.

4.2. *Proyectos en pequeñas y medianas organizaciones, PYMEs*

He investigado proyectos en dos extremos, megaproyectos (Drouin y Turner, 2022) y proyectos en organizaciones pequeñas y medianas. Los megaproyectos reciben mayor atención en la literatura en general, pero ambos representan alrededor del 20% del PIB. Sólo los proyectos pequeños quedan fuera de la atención. Ann Ledwith, John Kelly y yo (2009) identificamos que, en Europa, los proyectos suponen un tercio de la facturación de las PYME, y las PYME representan el 70% del PIB, por lo que alrededor del 20% del PIB son proyectos en las PYME. En 2008, cuando realizamos la investigación, el PIB mundial era de 50 billones de dólares, por lo que, extrapolando globalmente, en 2008 se gastaron 10 billones de dólares en proyectos en PYME. Si se pudiera mejorar un 20% reduciendo el coste, terminando antes o aumentando el beneficio, eso generaría 1 billón de libras. Esa fue la cantidad de dinero puesta a disposición ese año por los países del G20 para salvar la economía mundial. Una mejora del 10 % en los proyectos de las pymes es dinero suficiente para salvar la economía mundial.

Anne Ledwith y yo (2017) descubrimos que:

1. Las PYMEs realizan proyectos más pequeños que las grandes organizaciones, por lo que requieren prácticas de gestión más sencillas y menos burocráticas. Muchas PYMEs adaptan sus prácticas de forma inteligente. Pero para las empresas que se inician en la gestión de proyectos, el conocer el cuerpo del conocimiento y como aplicarlo puede ser muy desalentador. Las empresas que se inician en la gestión de proyectos necesitan un manual para empezar.

2. Muchas PYMEs son contratistas. Las normas profesionales tienden a estar escritas para organizaciones más grandes que son clientes. La contratación es un área de conocimiento, pero no la obtención y gestión de contratos.

3. Las PYMEs se centran mucho en las personas. Hemos observado que en Europa tiende a producirse una crisis de crecimiento a partir de las 50 personas, el límite entre las organizaciones pequeñas y medianas. A medida que las organizaciones crecen por encima de las 50 personas, tienen que pasar de trabajar en equipos multidisciplinares con un estrecho contacto entre las personas y los directivos, a trabajar como especialistas con mandos intermedios.

4. En las PYMEs, los gastos generales de gestión de proyectos son mayores desde el punto de vista porcentual. En los grandes proyectos, la gestión de proyectos representa alrededor del 5% del coste del proyecto, mientras que en las PYMEs puede llegar al 30%. La eficiencia en el uso de los recursos es una cuestión importante en las PYMEs. Sin embargo, las PYMEs perciben que el beneficio de utilizar la gestión de proyectos es mucho mayor que el coste.

4.3. *Megaproyectos y proyectos complejos*

He realizado algunos trabajos en el otro extremo, sobre megaproyectos (Drouin & Turner, 2022). John Eweje (2010) hizo su doctorado sobre cómo las decisiones tomadas por los gestores de proyectos afectan al valor estratégico aportado por los megaproyectos en la industria del petróleo y el gas. Él, Ralf Müller y yo publicamos un artículo conjunto. Descubrió varios resultados interesantes, pero los que más me interesan son:

1. De las variables independientes, la información sobre la satisfacción de las partes interesadas fue la que tuvo mayor impacto ion el valor estratégico. Este es uno de los muchos elementos de la investigación que he desarrollado en los últimos años y que demuestra que uno de los factores de éxito más importantes en los proyectos es la satisfacción de las partes interesadas, lo que ilustra dos cosas más
   –la necesidad del marketing de proyectos (véase más adelante) y de la participación de las partes interesadas (véase más arriba)
   –los proyectos deben centrarse en las partes interesadas y no en los accionistas.
2. De las variables moderadoras, una influyó y la otra no. Los altos directivos influyeron, pero el tiempo que una persona llevaba como gestora de proyectos no mejoró su toma de decisiones.

Nathalie Drouin y yo (2022) incluimos un estudio de caso en cada capítulo. La mayoría de ellos tuvieron éxito. Encontramos que los megaproyectos de éxito tienen cinco características en común:

1. Adaptaron la gestión de proyectos para hacer frente a la complejidad, como se ha descrito anteriormente.
2. Eligieron al contratista económicamente más ventajoso en lugar del más barato. El contratista que con la oferta económica más baja es el más mentiroso. Desgraciadamente, a los contratistas les lleva tiempo y esfuerzo presentar ofertas económicamente ventajosas, y a los clientes les lleva tiempo y esfuerzo evaluarlas. A menudo se toman atajos.

3. Establecen una relación contractual de colaboración en lugar del modelo tradicional promotor-contratista. Desde hace un cuarto de siglo se sabe que los contratos de promotor-contratista sólo funcionan en proyectos sencillos, y que en proyectos más complejos se necesitan contratos de colaboración (Davis et al, 1997), pero los viejos hábitos son difíciles de perder.
4. Trabajaron estrechamente con las partes interesadas internas y las trataron con respeto.

Hay personas que se consideran empresarios exigentes y piensan que eso significa que deben elegir al contratista más barato y exprimirlo hasta casi provocar pérdidas. Utilizan la contratación de agente principal para controlar estrechamente a los contratistas y tratar de intimidarlos hasta la sumisión. También intimidan a las partes interesadas externas. Cuando el proyecto fracasa, como sin duda ocurrirá, no puede ser culpa suya porque son empresarios exigentes. Así que buscan en lo que se ha escrito sobre por qué fracasan los megaproyectos y llegan a la conclusión de que debe ser por fragilidad. "No es culpa mía, soy un hombre de negocios duro y exitoso".

Nathalie Drouin y yo (2022) ponemos el ejemplo de la línea de metro Norte-Sur de Ámsterdam. Ese proyecto iba con retraso y se gastó más de la cuenta. Sin embargo, cambiaron la relación entre el cliente y el contratista de promotor-contratista a colaborador, convirtiendo al contratista en un departamento dentro de la organización del cliente. También empezaron a tratar a los habitantes de Ámsterdam con mayor respeto, adoptando una política denominada BLVC, en neerlandés *Bereikbaarheid, Leefbaarheid, Veiligheid y Communiatie*, (accesibilidad, habitabilidad, seguridad y comunicación). El resto del proyecto se completó en los plazos y costes previstos. Ejemplo de esto también son los túneles de aguas pluviales construidos en Sydney antes de los Juegos Olímpicos de 2000. Hubo un problema con un conducto de ventilación. Si se hubiera recurrido a la contratación de promotor-contratista, los contratistas habrían dicho al cliente: "Nos vamos hasta que solucionéis el problema", y el proyecto habría fracasado en ese momento. Como estaban utilizando la contratación de colaborador, los contratistas compartieron la solución del problema.

Turner y Xue (2018) ofrecieron una interpretación novedosa del éxito en los megaproyectos. Lo importante es que los megaproyectos deben producir un beneficio social, pero deben producir ese beneficio social en un momento y a un coste que haga que merezca la pena. Turner & Xue (2018) dijeron que los megaproyectos complejos no son lineales, lo que significa que pequeños cambios en los insumos pueden conducir a grandes cambios en los resultados. Así que cualquiera que afirme que puede predecir con precisión el tiempo y el coste hasta la finalización de un megaproyecto al principio es un tonto, un mentiroso o un estafador. Turner & Xue dan muchos ejemplos de megaproyectos que llegaron con cierto retraso y/o gastaron más de la

cuenta, pero aun así produjeron un beneficio social digno de mención, y basándose en ese beneficio social producen un valor actual neto positivo. Utilizan el ejemplo de la barrera del Támesis. Se gastó entre un 30% y un 300% más de lo previsto, según cómo se haga el cálculo; mis cálculos sugieren que se gastó un 100% más de lo previsto. También se retrasó un 100%: ocho años en lugar de cuatro. Pero, al evitar las inundaciones en Londres, se ha amortizado con creces. Sin embargo, también ilustra la importancia de la suerte. No hubo inundaciones en los ocho años de retraso; si las hubiera habido, habrían cambiado los cálculos económicos.

Nathalie Drouin y yo (2022) ponemos el ejemplo del túnel de base de San Gotardo, un túnel que atraviesa los Alpes suizos y conecta Milán con Zúrich. Debido a graves problemas geológicos, el proyecto se retrasó y se gastó más de la cuenta. Pero una vez terminado, el proyecto produjo un beneficio social sustancial, permitiendo a la gente viajar entre Milán y Zúrich más rápida y cómodamente. También transfirió importantes cantidades de mercancías de la carretera y el avión al ferrocarril. El proyecto también obtuvo un valor actual neto positivo, por lo que fue un éxito de inversión.

Nathalie Drouin y yo (2022) también decimos que, por desgracia, la población tiende a fijarse en las primeras estimaciones. Ponen el ejemplo de la Betuweroute, una línea ferroviaria de mercancías entre el puerto de Rotterdam y Alemania. Se hizo una primera estimación del coste antes de que se realizara el diseño. El proyecto se excedió en un 30%. En cambio, sólo se sobrepasó en un 6% la estimación realizada después del diseño inicial. Desgraciadamente, la opinión generalizada es que el proyecto fracasó.

5. Nueve escuelas

Llegamos a las Nueve Escuelas de Gestión de Proyectos, (Turner, Huemann, Anbari & Bredillet, 2012). Nuestro objetivo era elaborar una versión para la gestión de proyectos del libro de Gareth Morgan, *Images of Organization*, (Morgan, 2006), o del libro *Strategy Safari*, (Mintzberg, Ahlstrand & Lampel, 2008). La diferencia con el libro de Gareth Morgan era que muchas de sus imágenes se excluían mutuamente: una organización puede ser una máquina, un organismo o un cerebro, pero no una mezcla de ellos. Con nuestras perspectivas, las nueve se aplican a todos los proyectos. Nuestra tesis era que existen varias "escuelas" de investigación en el campo de la gestión de proyectos, y que a esas escuelas corresponden imágenes o perspectivas sobre los proyectos. Nuestra sugerencia era que los gestores de proyectos, en lugar de limitarse a pensar que tienen que gestionar el tiempo, el coste y la calidad mediante la gestión del valor ganado, deberían decidir qué perspectivas son relevantes para su proyecto, acudir a las escuelas adecuadas para encontrar métodos que les permitan gestionar las cuestiones importantes de su proyecto y desarrollar una metodología específica para su proyecto.

Hemos identificado nueve escuelas o perspectivas, que se enumeran a continuación. Nos basamos en los trabajos de Frank Anbari (1985), Christophe Bredillet (2004) y Jonas Söderlund (2002). Estos identificaron cinco, siete y siete escuelas respectivamente. A las suyas añadimos escuelas y dividimos escuelas para llegar a nuestras nueve. ¿Por qué nueve? El psicólogo George Miller (1956) sugirió que la gente procesa mejor la información en listas de siete: siete días de la semana; siete pecados capitales; siete maravillas del mundo; etc. Así que sugirió listas de siete más o menos dos. Mintzberg et al. (2006) afirmaron que las personas que trabajan en estrategia son más inteligentes que la población general, por lo que podrían procesar diez escuelas. Nosotros pensamos que podíamos sugerir que las personas que trabajan en gestión de proyectos son aún más inteligentes y podrían ocuparse de doce. Podríamos haber dividido las escuelas de gobernanza y comportamiento como se indica a continuación. Pero al final concluimos que las personas que trabajan en gestión de proyectos son más modestas que las que trabajan en estrategia, por lo que decidimos tener nueve. Podríamos haber reducido el número a siete fusionando optimización y modelización y proceso y decisión. No fusionamos optimización y modelización porque, aunque la optimización y la modelización de sistemas rígidos van de la mano, la modelización de sistemas flexibles no encaja con la optimización. No fusionamos proceso y decisión porque queríamos mantener el proceso separado. La escuela de sistemas (optimización) y la escuela de procesos son dos ramas importantes de la gestión de proyectos que queríamos reconocer. Las nueve escuelas son:

1. Éxito: el proyecto como empresa
2. Gobernanza: el proyecto como entidad jurídica
3. Comportamiento - el proyecto como sistema social
4. Marketing - la valla publicitaria del proyecto
5. Proceso - el proyecto como algoritmo
6. Decisión - el proyecto como un ordenador
7. Modelización - el espejo del proyecto
8. Optimización - el proyecto como máquina
9. Contingencia - el proyecto como camaleón.

Incluir la contingencia como escuela la convierte en un espejo que se auto refleja. Las nueve escuelas son un modelo de contingencia, que incluye la contingencia como escuela.

La gobernanza podría haberse dividido en la organización temporal, la gobernanza de la gestión del proyecto y la gestión del contrato. Christophe Bredillet (2004) incluía gestión de contratos y no gobernanza. El comportamiento podría haberse dividido en comportamiento organizativo y gestión de recursos humanos.

6. Marketing

Hace varios años impartí un seminario sobre las nueve escuelas en SKEMA Business School, y algunas personas dijeron que el marketing no es una escuela y no es relevante para la gestión de proyectos. Pero la investigación en marketing de proyectos tiene más de veinte años. Encargué el capítulo de Susan Foreman (1996) hace un cuarto de siglo, y Bernard Cova y Robert Salle llevan trabajando en el marketing de proyectos un tiempo similar (Cova, Mazet & Salle, 1996). Muchos gestores de proyectos no creen que tengan una función de marketing, pero no, tienen un papel importante, (Turner, Lecoeuvre, Sakaran & Er, 2019). El papel del marketing de proyectos lo comparten los gestores estratégicos, los gestores de cuentas y los gestores de proyectos, como sugerimos Anne Keegan y yo (2001) en nuestro trabajo sobre Gobernanza.

Más recientemente, he situado el marketing de proyectos en el contexto de la gestión organizativa de proyectos (Turner & Lecoeuvre, 2017). Hay tres organizaciones implicadas en la gestión de proyectos: el inversor, el contratista y el propio proyecto. Las tres tienen que hacer marketing. El inversor tiene que comercializar la inversión a lo largo de todo el ciclo de vida de la inversión, implicando a financiadores, contratistas, operadores y cliente. El contratista tiene que comercializar su competencia y fiabilidad para captar nuevos clientes. Y el proyecto tiene que promocionarse a sí mismo ante las partes interesadas. Tiene que convencer a los interesados de que el beneficio que obtendrán del proyecto es mayor que el coste que supondrá su participación, y para ello debe comunicarse con ellos en su lugar de trabajo (4P). Roya Derakhshan y yo (2022) también relacionamos el marketing con la gestión de las partes interesadas.

7. Éxito

Llevo escribiendo sobre el éxito de los proyectos tanto tiempo como sobre la gestión de proyectos (Andersen, Grude, Haug y Turner, 1987). En la primera edición de mi libro (Turner, 2014), establecí una diferencia entre lo que Terry Cooke-Davies (2001) denominó posteriormente éxito del proyecto y éxito de la gestión de proyectos. Desde la primera edición de mi libro, he tenido la manía de que el día antes de que comience el proyecto, el criterio de éxito clave es que debe ofrecer un valor actual neto positivo; (éxito del proyecto), el día después de que comience, todo en lo que se centra el gestor del proyecto es en el tiempo, el coste y la calidad, (éxito de la gestión del proyecto). Si el VAN positivo es importante antes de que empiece el proyecto, también debería serlo a lo largo de todo el proceso. Esa fue una idea explorada por Roxanne Zolin y yo, (2012). Durante el proyecto, el gestor de proyectos no debería (solo) controlar si el proyecto terminará a tiempo, con el coste y la calidad previstos, sino si ofrecerá el resultado deseado en los meses posteriores al proyecto, y los objetivos empresariales deseados en los años

posteriores al proyecto. Y si el proyecto entra en dificultades, es más importante optimizar el resultado y los objetivos empresariales que optimizar el tiempo, el coste y la calidad.

Roxanne y yo también desarrollamos el concepto de indicadores clave de rendimiento. Los indicadores clave de rendimiento son medidas de los criterios de éxito que se supervisan a lo largo del proyecto para asegurarse de que tiene probabilidades de alcanzar los objetivos deseados. Los indicadores de resultados principales son medidas de los factores de éxito supervisados a lo largo del proyecto para garantizar que es probable que se consigan los resultados deseados. Nueve de los once indicadores principales de rendimiento que identificamos se referían a la satisfacción de las distintas partes interesadas, lo que corrobora lo que he dicho antes al hablar del trabajo de John Eweje, que los gestores de proyectos deben adoptar la perspectiva de las partes interesadas y no la de los accionistas. Pedro Serrador y yo (2015) también exploramos la relación entre el éxito del proyecto y el éxito de la gestión de proyectos.

Ralf Müller y yo (2007b) realizamos un trabajo relacionado. Pedimos a 900 gestores de proyectos que clasificaran la importancia de diez criterios de éxito para el proyecto y luego medimos su rendimiento con respecto a los diez criterios de éxito y al proyecto en general. Así pudimos establecer una correlación entre la importancia que concedían a los diez criterios, el grado de cumplimiento de cada uno de ellos y el éxito global del proyecto. El criterio que más influyó en el éxito fue:

7.1. *Satisfacción del equipo*

Como sigo diciendo. "¿Nos sorprende?" La satisfacción del equipo es lo que más influye en el éxito del proyecto y, sin embargo, ¿cuántos directores de proyecto se centran en otro criterio? El criterio que tuvo el segundo mayor impacto fue la satisfacción del usuario y el que tuvo el tercer mayor impacto fue la satisfacción del cliente. Una vez más, los tres criterios más importantes de los diez estaban relacionados con la satisfacción de las partes interesadas, lo que corrobora los resultados de Turner y Zolin (2012). Uno de los tres que NO tuvo impacto fue:

7.2. *Terminado en coste, tiempo y calidad*

Si quieres que tu proyecto tenga éxito, céntrate en la satisfacción de las partes interesadas. El tiempo, el coste y la calidad se cuidarán solos.

Como ya he dicho, me alegro de que Terry Cooke-Davies creara el sencillo constructo del éxito del proyecto y el éxito de la gestión del proyecto. Pedro Serrador y yo medimos la correlación entre ambos. 60%. Si un proyecto termina a tiempo, con el coste y la calidad previstos, el 60% de las veces alcanzará sus objetivos empresariales, pero el 40% de las veces no. Y si termina tarde y se excede en los gastos, el 40% de las veces alcanzará sus objetivos empresariales.

7.3. *Valor para el inversor*

Proyectos para el valor de los accionistas es lo que considero que ha sido mi "podría haber sido". Me interesaba evaluar la contribución de los proyectos al valor para el inversor de la organización patrocinadora (Mills y Turner, 1995) e intentar averiguar cómo variaba esa contribución en función de los distintos coeficientes financieros de la organización (Turner, 1998). Esperaba que eso indicara en qué ratios financieros podía ser más importante el acabado a tiempo, el coste o la calidad. En la Universidad Erasmus tuve un estudiante de doctorado que estudiaba cómo utilizar el análisis del valor para los accionistas en la evaluación de proyectos (Akalu, 2003).

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El lado oscuro de la Proyectificación racionalizando, flexibilizando y responsabilizando al yo proyectizado

Yannick Kalff

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Resumen

El proceso de proyectificación transforma las organizaciones económicas y las instituciones sociales al aumentar la importancia de la lógica y la estructura del proyecto. Este proceso afecta también a los individuos, con un fuerte énfasis en la autorresponsabilidad, la autoorganización, el cumplimiento de los plazos, la temporalidad y la eficiencia, y crea una nueva forma de subjetividad: los individuos se convierten y tienen que actuar como seres proyectados. La proyectificación transforma los diseños vitales y los patrones biográficos individuales para adaptarlos a la lógica de los proyectos. Para los individuos, los proyectos ofrecen una promesa normativa de eficiencia que va de la mano de la idea de controlabilidad y planificabilidad racionales mediante el uso de técnicas de gestión específicas. Sin embargo, la proyectificación es ambivalente. Sus promesas de autonomía, autorrealización y autoeficacia esconden un lado oscuro, no necesariamente malo, pero potencialmente peligroso para los individuos. Este capítulo analiza las raíces de la proyectificación -flexibilización, responsabilización y racionalización- como efectos clave de la gobernanza neoliberal. Para los yos proyectificados, estas raíces equivalen a una estructura biográfica que controla las nuevas libertades individuales y permite a los individuos justificar sus elecciones vitales siempre que aumenten el valor de sus propios proyectos. La estructura biográfica proyectificada —por último— aumenta las vulnerabilidades que potencialmente conducen a vidas precarias y perturbadas.

Palabras clave: Proyectificación; Yo proyectado; Precariedad; Flexibilización; Racionalización; Responsabilización.

> "Mi opinión no es que todo sea malo, sino que todo es peligroso,
> que no es exactamente lo mismo que malo"
>
> Michel Foucault (1982a)

> "En realidad, la Luna no tiene lado oscuro; de hecho,
> está toda oscura. Lo único que la hace parecer clara es el sol"
>
> Gerry O'Driscoll

1. Introducción

Este capítulo presenta y analiza el lado oscuro de la proyectificación para los individuos proyectificados. El proceso de proyectificación describe que las formas y lógicas de los proyectos -por ejemplo, la autorresponsabilidad, la autoorganización, la limitación temporal, la temporalidad o la eficiencia- estructuran contextos sociales. Junto a los diseños de vida individuales y como patrón estructural biográfico (Berglund et al., 2020; Kalff, 2017b), los proyectos se convierten en la característica designada de las organizaciones económicas y la estructuración de las instituciones sociales (Lundin et al., 2015). Los proyectos ofrecen una promesa normativa de eficiencia, control racional y planificación garantizada cuando se aplican técnicas de gestión específicas. Este tipo de esfuerzos son ambivalentes: sus promesas de autonomía, autorrealización y autoeficacia esconden un lado oscuro, no necesariamente malo, pero potencialmente peligroso para las personas vulnerables a la precariedad.

Las organizaciones son un fenómeno moderno. Max Weber vio la sociedad moderna como un mundo permeado de burocracias administrativas (Weber, 1958, 1978). Partiendo del diagnóstico de Weber sobre la burocratización, que él interpretaba como procesos modernos de racionalización, numerosos autores han destacado la importancia de las organizaciones en y para la sociedad: Presthus (1962) examinó "la sociedad organizativa" y sus individuos. Adorno habló del mundo administrado que se basa en procesos burocráticos alienantes al tiempo que garantiza un trato objetivo y equitativo (Adorno, 1953/2003). Perrow examinó el siglo XX como una "sociedad de organizaciones" en la que toda la vida tiene lugar sucesivamente en organizaciones, está regulada por organizaciones y depende de organizaciones (Perrow, 1991).

La importancia de la organización y la administración es ininterrumpida. Sin embargo, desde mediados del siglo XX, la forma de organización cambia. Se impone una lógica organizativa diferente, que moldea cada vez más nuestros estilos de vida, biografías y organizaciones (Ekstedt et al., 1999; Grey, 1994; Jacobsson y Lundin, 2019; Jensen, 2012). La sociedad y las organizaciones siguen estando estrechamente interrelacionadas, pero estas últimas se han transformado en organizaciones temporales flexibles que han sustituido a las grandes burocracias admi-

nistrativas permanentes (Lundin et al., 2015). En un proceso de "proyectificación" (Midler, 1995), las primeras corporaciones transforman las lógicas organizativas estructurales-funcionales jerárquicas hacia proyectos autónomos con mecanismos de control indirecto. Así, el uso de proyectos delimitados se ha convertido en una estrategia central que se utiliza para alcanzar objetivos corporativos flexibles con respecto a mercados y clientes (Herbst, 1976).

Casi 30 años después del diagnóstico fundamental de Midler sobre el proceso de proyectifica-ción en Renault, la lógica de proyecto se ha expandido de forma ubicua en la sociedad (Lundin et al., 2015; Lundin, 2016; Midler, 1995). La lógica del proyecto sugiere una estructura específica que cambia nuestra relación con la sociedad, las organizaciones y, en última instancia, con nosotros mismos. La promesa de autonomía y flexibilidad que encierran los proyectos libera a la sociedad de la "Jaula de Hierro" que, según Max Weber, imponía la racionalidad formal. Sin embargo, esta liberación de las viejas estructuras de poder y dominación ha dado lugar a nuevas formas de gobernanza: la lógica de los proyectos emplea el autocontrol y la autogestión para racionalizar un comportamiento basado en códigos de conducta y libertades personales (Foucault, 1982b, 1988). Estos modos indirectos de control se convierten en premisas y consecuencias de la autonomía. Tras el fin de la "Jaula de Hierro", nuevas formas de control y gobernanza específicas de los proyectos se han integrado en las organizaciones, así como en la forma de nuestras biografías. La proyectificación no es una trayectoria liberadora per se que nos libere de antiguas limitaciones. Implica nuevas dependencias y prácticas de subjetivación. La proyectificación constituye una subjetividad neoliberal que he denominado el yo proyectificado (Kalff, 2017b). Inculca "seres humanos autocontroladores, auto-mejoradores, autocomercializadores, compartimentadores de la vida y orientados a los plazos" (Berglund et al., 2020, p. 367).

Este artículo arroja luz sobre el lado oscuro de la proyectificación como modo neoliberal de gobernanza de los individuos. Para ello, explora las siguientes cuestiones: ¿Cómo afectan los efectos estructurales de la proyectificación al yo proyectificado? ¿Dónde reside el lado oscuro de la proyectificación para el sujeto individual? El capítulo elabora los colaterales de los procesos de proyectificación en la sociedad y la economía para ofrecer una perspectiva más matizada sobre cómo las lógicas organizacionales impregnan la sociedad y los individuos. La proyectificación representa un tipo específico de razón instrumental que aborda ciertos retos poniendo en marcha otro proyecto y proporcionándonos los instrumentos para hacerlo.

Para empezar, es interesante recurrir al término del lado oscuro. En primer lugar, la metáfora del "lado oscuro" describe las cualidades negativas de un fenómeno por lo demás positivo. Inevitablemente, las características positivas y negativas se encuentran en una disyuntiva. En segundo lugar, la metáfora sugiere que las relaciones entre las características positivas y negativas de un fenómeno son insepa-rables. En tercer lugar, el término describe que algunos aspectos de un fenómeno

están iluminados mientras que otros permanecen en la sombra. Ciertas cualidades siguen siendo inconcebibles en comparación con las que están en el punto de mira. Así, para llevar la luz al lado oscuro necesitamos girar el objeto, iluminarlo de otra manera o entrar en la oscuridad y acostumbrarnos a ella para poder reconocerlo. En los debates científicos, el tópico del lado oscuro sirve sobre todo para destacar los lados negativos y los peligros que forman parte de las características positivas de los objetos de investigación. Vemos el lado oscuro de la planificación, la digitalización, las organizaciones éticas, la modernidad o las ideas occidentales de progreso e Ilustración, todas las cuales proponen características inicialmente positivas de soluciones racionales y eficientes para los problemas sociales y de la sociedad (por ejemplo, Alexander, 2013; Flyvbjerg y Richardson, 2002; Mignolo, 2011).

A continuación, el lado oscuro sacará a la luz lo desapercibido y lo negativo de la proyectificación. Para ello, en primer lugar, se ofrece una visión general sobre el surgimiento de la lógica del proyecto y sobre la proyectificación. A continuación, se describe brevemente las investigaciones existentes que utilizan el tema del lado oscuro de la proyectificación. En la segunda sección, se analiza la lógica de la proyectificación en las sociedades neoliberales en las tres transformaciones estructurales -flexibilización, responsabilización y racionalización- para mostrar cómo la proyectificación las necesita, pero también las facilita. En la sección tres, se presenta una discusión sobre estas transformaciones estructurales y su impacto en el yo proyectificado, en lo que respecta a la subjetividad, su legitimidad y su potencial precariedad. Por último, el ensayo concluye con una observación sobre la neutralidad valorativa de los proyectos y el carácter instrumental de la proyectificación.

2. Proyectos, Lógica Proyectual Y Proyectificación

2.1. *La aparición de la lógica proyectual*

Los orígenes de los proyectos y la lógica de los proyectos modernos ya han sido tratados en detalle en otras publicaciones (Bröckling, 2016: 172-177; Kalff, 2017b: 14-15, 2018: 33-49). Los proyectos aparecieron por primera vez en un estudio de Daniel Defoe (1697). Un "proyectista" era una persona deshonesta, un impostor que prometía la luna. Desde entonces, los proyectos y sus correspondientes portadores, ejecutores, planificadores o interesados se han transformado profundamente y se han convertido nada menos que en el arquetipo moderno de la gestión (Gaddis, 1959). El término proyecto y los gestores de proyectos asociados experimentaron un cambio de imagen positivo. Thomas (2006) subraya cómo la gestión moderna de proyectos tomó forma primero en el complejo militar-industrial de los años cuarenta a los ochenta, y luego se profesionalizó y extendió a las economías occidentales. Los proyectos prometen medios racionales y eficaces para alcanzar con éxito objetivos complejos y singulares que conllevan un alto grado de incertidumbre. Para ello, el objetivo global se desglosa en multitud de pequeñas

subtareas individuales que -en sí mismas- son manejables y relativamente fáciles de completar. Así, es posible gestionar y respetar dimensiones críticas como el tiempo, la mano de obra, la calidad o el presupuesto.

Los proyectos contienen implícitamente la promesa positiva de que cualquier cosa puede gestionarse con éxito cuando la convertimos en un proyecto y aplicamos adecuadamente los conocimientos correctos de gestión de proyectos en forma de herramientas, procesos o estrategias. Los proyectos son un medio para alcanzar objetivos complejos, y la gestión de proyectos garantiza las herramientas adecuadas y su uso. Sin embargo, esta visión funcionalista-positivista enmascara profundas ambivalencias y ambigüedades que hacen del fracaso del proyecto una opción viable y realista (Pinto y Kharbanda, 1996). Thomas vio un "ejemplo prototípico de la racionalización y tecnocratización de la gestión" (Thomas, 2006: 103), mientras que otros objetaron que los proyectos serían "una panacea" (Maylor et al., 2006: 668), la última solución para abordar cualquier cosa.

Un tema central de la investigación es el estatus organizativo de los proyectos. A diferencia de las organizaciones convencionales y permanentes, los proyectos se caracterizan por ser de naturaleza temporal (Bakker, 2010; Bakker et al., 2016; Packendorff, 1995). Por lo tanto, las prácticas, los procesos y las interacciones son más importantes para (re)crear la organización de los proyectos y el trabajo que las decisiones y las estructuras (permanentes) (Kalff, 2018, 2022). En los últimos 20 años, la investigación de proyectos ha evolucionado de un "modelo de cascada" de subtareas dependientes a un enfoque más flexible. Especialmente el desarrollo de software digital ha contribuido a la concepción y difusión de filosofías de gestión de proyectos adaptadas, como los modelos actualmente más conocidos SCRUM o la gestión ágil de proyectos (Beck et al., 2001; Pfeiffer et al., 2021). Los proyectos ya no proceden de forma lineal desde el inicio, la planificación, la ejecución hasta la finalización, sino que son una iteración continua de planificación, pruebas y despliegue que se adapta totalmente a las necesidades de cada cliente. Las prácticas reflexivas y procesuales de los proyectos ágiles requieren un trabajo cuidadoso para mantener las relaciones sociales y las rutinas organizativas (Coban y Wenten, 2021).

La omnipresencia de la lógica de proyecto es evidente. A escala meso, Midler (1995) acuñó el término proyectificación para describir la transformación del Grupo Renault, que pasó a un principio organizativo basado en productos y carteras, caracterizado por una flexibilización constante y una creciente autonomía de las subunidades y formas organizativas en torno a ciclos de modelos recurrentes. Aunque puede que Renault no fuera el principio ni el epicentro de la lógica de proyectos, el impacto de la terminología procesual es evidente. Hoy en día, la proyectificación va más allá de las organizaciones y se ha convertido en una dinámica social que lo capta y lo transforma "todo" (Jensen et al., 2016). Por lo tanto, se impone una diferenciación de la dinámica de la proyectificación.

2.2. *Análisis de la proyectificación*

La Sociedad de las Organizaciones dibujada por Perrow (1991) hace hincapié en el papel de las organizaciones en la modernidad a todos los niveles, desde el individuo hasta los grupos que se organizan y la sociedad que está formada y constituida por organizaciones. Si la proyectificación transforma el leitmotiv de las sociedades modernas, entonces es razonable pensar en sociedades proyectificadas o proyectadas. En cifras, la proyectificación es evidente en la creciente importancia del trabajo por proyectos a nivel social, que Schoper et al. (2018) estiman en torno al 33 % para Alemania, Noruega e Islandia. Además, las instituciones profesionalizan la lógica de los proyectos y difunden los conocimientos sobre gestión de proyectos al resto de la sociedad, continuando así los procesos de proyectificación (Wagner et al., 2022).

Sin embargo, existen distintas formas de proyectificación. Packendorff y Lindgren (2014) han destacado la diferencia entre proyectificación estrecha y amplia para expresar las dimensiones sociales y comunitarias de la proyectificación. Mientras que la proyectificación estrecha implica un modo de reestructuración operativa de las entidades económicas que adoptan formas de proyecto, una lectura amplia de la proyectificación transforma los códigos culturales. Los códigos culturales son metáforas de estructuración y ordenación que trascienden las organizaciones empresariales, lo que significa que los proyectos se convierten, por ejemplo, en metáforas de los estilos de vida individuales y de la responsabilidad biográfica (Kalff, 2016). Según Packendorff y Lindgren, tanto la proyectificación estrecha como la amplia conllevan un "ciclo maligno" negativo (2014: 17). La presión competitiva y los requisitos de racionalización ponen en marcha una espiral de aumento del esfuerzo, el trabajo y la tensión que favorecen efectos secundarios negativos como la heroización del rendimiento y un ethos de éxito. Esta "(re)masculinización de las prácticas laborales posburocráticas" (Packendorff y Lindgren, 2014: 13) es un primer indicador de un lado oscuro de la proyectificación.

Jacobsson y Jałocha (2021) realizaron un estudio bibliográfico para clasificar la secuencia cronológica de la proyectificación que crece a diferentes ritmos. En tres fases (1995-2008, 2009-2014 y a partir de 2015), los autores distinguen cuatro términos de proyectificación: proyectificación como enfoque de gestión, como tendencia social, como estado humano y como cuestión filosófica. Mientras que las tres primeras áreas examinan el impacto de la proyectificación en los individuos, las organizaciones y la sociedad, la última, la lectura filosófica, describe un "cambio metafísico en la percepción del tiempo, el espacio y el trabajo" (Jacobsson y Jałocha, 2021: 1597) que transforma a los individuos, las organizaciones y la sociedad.

Ambas contribuciones tienen en común que entienden la proyectificación, por un lado, como un fenómeno organizativo, estrechamente vinculado a la evolución de las empresas y el mercado y directamente entrelazado con las formas de trabajo

y organización. Por otro lado, la proyectificación es un cambio semántico. Las metáforas de proyecto estructuran cada vez más la identidad individual del yo y constituyen una forma de subjetividad de la modernidad tardía. Así, el lado oscuro de la proyectificación es un elemento del trabajo, el empleo y las organizaciones. Además, el lado oscuro de la proyectificación forma parte de la modernidad tardía contemporánea y se manifiesta en las subjetividades. El gobierno y el control de los individuos, de su conducta y de sus elecciones vitales se sirven de metáforas del "proyecto". Los sujetos participan en proyectos de los que son responsables (Brown, 2015).

2.3. *Explorando el lado oscuro de la proyectificación*

En esta subsección, se esbozan brevemente tres líneas de investigación sobre proyectos, antes de abordar directamente los lados oscuros de los proyectos y la proyectificación.

Geraldi y Söderlund (2018) distinguen tres vertientes de investigación sobre proyectos y gestión de proyectos. La investigación de tipo 1 se ocupa de los criterios de eficiencia y racionalización para optimizar los proyectos a través de factores objetivos de éxito. La investigación de tipo 2 analiza las prácticas sociales y su ambigüedad que desafía la investigación de proyectos instrumental positivista e impulsada por la eficiencia; así pues, los proyectos son entornos sociales desordenados que pueden desafiar la planificación y organización racional objetiva. La investigación de tipo 3 examina los proyectos y su gestión con un interés emancipador: aborda las relaciones de poder y dominación despersonalizadas e integradas en estructuras temporales y ofrece puntos de apoyo para una forma sostenible de trabajo y organización.

Según estas clasificaciones, las investigaciones de tipo 2 y 3 abordan los efectos secundarios negativos o no intencionados de la proyectificación que podrían llegar a constituir un lado oscuro. La investigación de tipo 3, en particular, incluye un programa de investigación de emancipación para liberarse de las relaciones de dominación social y organizativa arraigadas en la proyectificación. Este compromiso crítico fue promovido por Cicmil et al. porque "la proyectificación es un problema ético complejo con consecuencias para la sostenibilidad a largo plazo de las organizaciones y la sociedad" (Cicmil et al., 2016: 59). La proyectificación, argumentan, instala una orientación específica hacia la eficiencia y la temporalidad en las organizaciones, la sociedad y los individuos que sugiere que la gestión de proyectos positivista y su arsenal de herramientas funcionales podrían dominar cualquier proyecto con éxito. En última instancia, sin embargo, el riesgo residual de fracaso sigue siendo una responsabilidad individual.

Dos estudios hablan explícitamente de un lado oscuro de los proyectos y la proyectificación. Aguilar Velasco y Wald (2022) investigan el lado oscuro del tra-

bajo en proyectos en una revisión bibliográfica e identifican factores ambientales, organizativos, específicos del proyecto e individuales que potencialmente pueden tener consecuencias estresantes para los empleados. Por otro lado, Locatelli et al. (2022) definen que "el lado oscuro de los proyectos es cualquier fenómeno ilegal o poco ético asociado a los proyectos". Así, el lado oscuro incluye desde conductas indebidas individuales en los proyectos hasta sobornos ilegales en los procesos de contratación para adquirir proyectos. Ambos estudios concluyen que se sabe muy poco sobre el lado oscuro de la proyectificación y los proyectos, por lo que la investigación sobre proyectos debe examinarlo con más detenimiento. No obstante, ambos estudios demostraron que la proyectificación puede facilitar el trabajo exhaustivo o la mala conducta. En última instancia, ambos estudios analizan los efectos individuales que los proyectos pueden agravar, sin embargo, se mostraron vagos sobre cómo estas consecuencias negativas son el resultado de la lógica estructural de la proyectificación. Es evidente que existen muchas perspectivas diversas sobre los "lados oscuros" cuando examinamos la proyectificación más de cerca. Puede consistir en actividades ilegales dentro de los proyectos y en torno a ellos, como sobornos en los procesos de contratación, condiciones laborales de explotación o degradación medioambiental debida a normas descuidadas o proyectos insostenibles per se. Aunque estas actividades pueden estar relacionadas con proyectos a todas las escalas, el comportamiento ilegal y poco ético atrae mucha publicidad en los megaproyectos de gran envergadura.

El objetivo de este capítulo es comprender el lado oscuro de la proyectificación como premisa social que afecta a los individuos en su condición de seres proyectificados. Por lo tanto, este capítulo utiliza una "concepción amplia" de la proyectificación (Packendorff & Lindgren, 2014) y sigue la interpretación individualista y filosófica de la proyectificación (Jacobsson & Jałocha, 2021). La proyectificación puede ser una metáfora de una subjetividad específica que reorganiza los estilos de vida individuales de acuerdo con el "cambio metafísico" (Jacobsson y Jałocha, 2021) de la temporalidad, la espacialidad y las relaciones laborales en las economías políticas neoliberales. Esta subjetividad es el yo proyectificado.

3. El yo proyectizado y sus orígenes en los efectos estructurales del neoliberalismo

En esta sección, se describen tres efectos estructurales principales - racionalización, flexibilización y responsabilización - que son propiciados por el neoliberalismo y que transforman las economías y las sociedades contemporáneas. Simplificando, el neoliberalismo instala mecanismos de mercado para gobernar y coordinar a los actores que interactúan sucesivamente en relaciones mercantilizadas. El neoliberalismo es ante todo una agenda política que instaura patrones de acción en los niveles organizativo e individual. A nivel social, reestructura los gobiernos y

las instituciones para que se adhieran a los modos de intercambio del mercado para valorar, organizar o conducir las relaciones sociales (Cahill et al., 2018; Har-vey, 2005). La racionalización, la flexibilización y la responsabilización son efectos de una transformación neoliberal y van de la mano de la proyectificación: los efectos estructurales producen desafíos para los que la proyectificación promete respuestas.

Desde la década de 1970, las organizaciones actúan en un entorno cada vez más complejo, en mercados volátiles para satisfacer demandas individualizadas de los clientes que exigen el desarrollo y la prueba de productos muy específicos en ciclos de innovación que se aceleran. Las organizaciones operan en un mar de incertidumbre cada vez mayor que ya no pueden controlar mediante técnicas convencionales de planificación, gestión o predicción. En su lugar, las organizaciones y la sociedad delegan la gestión de la incertidumbre en el individuo, que tiene que vivir y lidiar con la ambigüedad. Aunque las organizaciones introducen la autonomía y la orientación al mercado a través de la proyectificación, los efectos y la responsabilidad recaen en los empleados que se adaptan a las nuevas formas de trabajo de los proyectos (Bröckling, 2016; Pongratz y Voß, 2003). Los individuos interiorizan la lógica del proyecto y actúan en consecuencia en la empresa. A nivel social, se introducen modos de gobernanza igualmente individualizadores que se basan en la autonomía y la orientación al mercado: las incertidumbres emergentes para los individuos se afrontan con apelaciones a la autogestión, la autoorganización y la responsabilidad individual.

A continuación, se analizarán los tres efectos estructurales contemporáneos de la racionalización, la flexibilización y la responsabilización para mostrar cómo aumentan en importancia y cómo la proyectificación proporciona los medios para cumplir sus requisitos.

3.1. *Flexibilización*

Los cambios sociales y económicos descritos anteriormente también se reflejan en mayores requisitos de flexibilidad (Masquelier, 2017: 35-38). Desde la década de 1980, ha aumentado la importancia de los mercados financieros y de capitales, obligando a las empresas a seguir estrategias orientadas a estos mercados. Las orientaciones a corto plazo de los mercados financieros y los correspondientes modos de gestión empresarial, como el valor para el accionista, conducen a requisitos de flexibilidad en las organizaciones empresariales (Fligstein y Goldstein, 2022: 202). Esta flexibilidad necesaria contrarresta la incertidumbre inducida por el mercado que surge de los cambios rápidos y volátiles del mercado. Más recientemente, las tecnologías digitales desafiaron los procesos laborales y organizativos. Además, las innovaciones en las tecnologías digitales suponen un reto para los procesos de trabajo y organización, y exigen una coordinación flexible y unos procesos de implantación acelerados en las empresas para adaptarse a la tecnología en constante

cambio (Kalff, 2019). La proyectificación maneja esta incertidumbre proporcionando estabilidad temporal en las organizaciones: los proyectos adquieren un estatus especial para realizar empresas de alto riesgo en un plazo de tiempo determinado, tras el cual finalizan.

La gestión ágil de proyectos destaca por el hecho de que promete una gestión sostenible y eficaz de proyectos flexibles y rápidamente cambiantes en el desarrollo de software. (Beck et al., 2001). En este contexto, la rápida evolución de los requisitos del cliente, la constante iteración de prueba y error y la entrega progresiva de software parcialmente terminado ponen rápidamente al límite el "modelo de cascada" tradicional de enfoques por fases (Lenfle y Loch, 2010). La gestión ágil de proyectos institucionaliza enfoques iterativos para agilizar la flexibilidad: el objetivo de planificación se compara con los estados reales, las ideas de los clientes se integran en los procesos de desarrollo a través de bucles de retroalimentación, lo que hace que la planificación sea flexible y adaptable. En esprints consecutivos, el proyecto crea entregables incrementales que se despliegan para su uso productivo y retroalimentación.

Mientras el trabajo y la organización se esfuerzan por conseguir flexibilidad y la buscan en la agilidad, surgen demandas comparables para los individuos y la sociedad. La flexibilidad se está convirtiendo en una constante fundamental de la existencia humana: las transformaciones sociales aflojan la estructura y hacen imperativa la adaptación flexible de las biografías individuales, así como de las instituciones sociales (Sennett, 1998). La lógica del proyecto se convierte en un modo de justificación para que, tanto las personas como las instituciones, busquen la temporalidad, el cortoplacismo, la flexibilidad y el no compromiso con el arraigo de las relaciones sociales (Boltanski y Chiapello, 2007). La aceleración social condensa los acontecimientos vitales y hace imprescindible la planificación de eventos de rápido desarrollo, dejándonos en una persecución cada vez mayor (Rosa, 2015). Episodios de calidad diferente, igual o inconmensurable, deben planificarse individualmente en serie, en paralelo, superponiéndose, con rupturas o continuidades, y legitimarse retrospectivamente como una narrativa biográfica. La educación y la formación, los múltiples empleos y las diferentes experiencias laborales, las relaciones de carácter familiar, amistoso o íntimo, la planificación de los hijos, todo ello forma parte de un diseño vital cada vez más complejo que rompe con la "biografía normal" para lograr la flexibilidad y el desarraigo (Kalff, 2016, 2017a, 2017b; Tsiolis y Siouti, 2022).

3.2. *Responsabilización*

En el neoliberalismo, la rendición de cuentas guía las acciones tanto de los individuos como de los agentes institucionales. Especialmente las investigaciones que siguieron a los trabajos de Michel Foucault (Foucault, 2008, 2009) sobre el neoliberalismo retomaron la idea de que el neoliberalismo representa una tecnología gubernamental de modos de control personalizados e individualizados. Esto

significa que —en lugar de una dominación disciplinaria descendente de los individuos en las sociedades— el neoliberalismo instala ciudadanos conceptualmente "libres" que son capaces de actuar como sujetos económicos: el homo economicus. Gobernar a este sujeto requiere garantizar un suelo fértil para su libertad y limitarse a proporcionar barandillas para su comportamiento en lugar de dictarlo de forma estricta (Fou-cault, 2008: 63). Aquí es donde entra en juego la responsabilización del neoliberalismo: invoca una economía moral de las acciones, que Shamir (2008) desentiende como tecnología de gobierno en el sentido de Foucault. En las sociedades neoliberales, una conducta específica ya no es impuesta por la disciplina, sino que se convierte en "principios rectores" que los actores morales persiguen debido al "cuidado de los propios deberes y la aplicación no coaccionada de ciertos valores" (Shamir, 2008: 7). Para Brown (2015), la responsabilización es una forma opaca de dominación que constituye sujetos neoliberales autónomos que se responsabilizan de sus actos. "Sólo un agente moral entendido como dispuesto a sus acciones puede ser responsable de sí mismo" (Brown, 2015: 133).

Para los sujetos neoliberales, la proyección de la sociedad conduce a la yuxtaposición de responsabilidades de diferente peso. La mera singularidad de tales responsabilidades, como la propia educación y formación, las relaciones familiares y sociales, la carrera profesional o el crecimiento individual, se ven quebrantadas por la proyectificación. La proyectificación, como estado humano y como cuestión filosófica, desencadena diversas responsabilidades difíciles de organizar o incluso mutuamente excluyentes. La planificación de la carrera profesional individual y los deberes familiares como padre cuidador son solo un ejemplo de esta lucha, e indican "responsabilidades contrapuestas" (Trnka y Trundle, 2014). Sin embargo, la proyectificación ofrece medios para comparar las responsabilidades divergentes en función de métricas específicas: el tiempo empleado, el tiempo disponible, los costes y los beneficios previstos (materiales o inmateriales) son ejemplos de criterios de evaluación que pueden orientar la selección y ejecución responsable de proyectos.

La gestión de proyectos proporciona un conjunto de herramientas para trabajar con la lógica del proyecto: la planificación del tiempo y de los recursos es clave para planificar las biografías individuales, valorar los distintos proyectos y ajustarse a la lógica del proyecto. Así pues, la proyectificación tiene un carácter instrumental en la construcción de las identidades biográficas, la carrera y la estructuración de las relaciones sociales en la modernidad tardía. Sin embargo, en lo que respecta a la responsabilidad, los individuos siguen estando solos: los fracasos de los proyectos son cuestiones de aplicación incorrecta de las herramientas, no de si las herramientas en sí son adecuadas o potencialmente defectuosas. Por un lado, la responsabilidad se traslada a los individuos, pero las causas de la proyectificación son sistémicas. Los cambios sociales en la responsabilidad que se adaptan a una lógica de proyecto e instalan nuevas formas de subjetividad podrían requerir una definición diferente de la responsabilidad (Henkel y Andersen, 2015).

3.3. *Racionalización*

La racionalización es el diagnóstico central de las sociedades modernas según Max Weber. Weber describió la modernidad como la racionalización progresiva en un proceso de "desencantamiento", en el que la lógica científica desvela el mundo y sus relaciones sociales (Jenkins, 2000; Weber, 1919/2004). La racionalidad y la eficiencia se convierten en las fuerzas motrices del progreso y abarcan cada vez más todas las partes de la sociedad hasta el mundo de la vida individual: las relaciones interpersonales se configuran cada vez más de acuerdo con la eficiencia y la optimización de costes y beneficios, dándoles cada vez más una forma instrumental.

La proyectificación fomenta la racionalización a dos niveles: organización y trabajo. En primer lugar, en lo que respecta a la organización, los proyectos complejos y únicos se dividen en subconjuntos fáciles de supervisar y alcanzar. La proyectificación pretende utilizar eficazmente los recursos disponibles, simplificar la complejidad y gestionar la incertidumbre mediante procesos iterativos. En segundo lugar, la proyectificación ofrece estrategias de control racionales que, por un lado, autoorganizan el trabajo en torno al objetivo del proyecto y, por otro, gestionan el progreso del proyecto en formas de control de varios niveles (Lenfle & Loch, 2010). Esto puede parecer paradójico, como afirmaron Sauer y Nicklich (2021): la autoorganización se sigue imponiendo desde arriba, pero, al mismo tiempo, la autoorganización ejerce un nuevo modo de control que tiene sus raíces en la autonomía. En consecuencia, los individuos interiorizan el control racional y la planificación, deben organizarse a sí mismos y son responsables de los resultados (véase responsabilización).

El control del proceso se sustituye por el plan: un proyecto es un procedimiento planificado y los recursos necesarios se despliegan de la forma más eficiente posible con el fin de cumplir el alcance temporal de los pasos individuales para completar con éxito el proyecto en el plazo previsto (Kalff, 2022; Yakura, 2002). Los procesos de planificación, así como el plan, son la expresión de un enfoque racional del objetivo del proyecto. Sin embargo, el camino hacia el objetivo planificado no está sujeto a una estrecha supervisión, como se ha debatido, por ejemplo, en la Teoría del Proceso Laboral: la dominación en el proceso de producción moderno basado en proyectos ya no es una relación social directa entre superiores y subordinados, sino que está interiorizada (Kalff, 2018). Los resultados de este proceso de producción específico del proyecto -los entregables- tienen que superar la prueba del mercado, es decir, ante el cliente.

En todo esto, el papel de la gestión de proyectos en la sociedad proyectificada adquiere un papel significativo (Hodgson y Cicmil, 2006). La gestión de proyectos presenta conocimientos instrumentales y herramientas profesionales para dirigir un proyecto. Su carácter de herramienta instrumental confiere a los proyectos y a su gestión un estatus de valor neutro cuya aplicación per se es racional y cuya necesidad se convierte en indispensable para el progreso.

Los seres proyectados utilizan la lógica de los proyectos para cumplir los requisitos de racionalización tanto en la vida laboral como en la privada. Por lo tanto, la proyectificación no se limita a las organizaciones y al empleo remunerado en el moderno proceso de producción basado en proyectos, sino que se extiende a toda la vida, que requiere cada vez más planificación y estructuración por parte del individuo. La proyectificación ofrece un marco y los instrumentos que hay que aplicar bajo la propia responsabilidad. En este sentido, la proyectificación nos permite planificar y gestionar nuestro trabajo y a nosotros mismos. Sin embargo, la proyectificación proporciona restricciones que reducen los resultados a los resultados deseables, a las subjetividades deseables que racionalizan su plan de vida para maximizar su capital humano (Lindgren y Packendorff, 2006).

4. El lado oscuro de la proyectificación para el yo proyectificado

El yo proyectificado es una forma neoliberal de subjetividad que responde a tres transformaciones estructurales distintas pero interrelacionadas. Para ello, se concede a los sujetos amplias libertades que les facultan para actuar y decidir de forma autónoma, autorresponsable y autodeterminada. Sin embargo, el yo proyectificado también depende de las tres transformaciones estructurales, ya que allanan el camino para la libertad individual. El resultado es una forma de subjetividad que se adhiere a la lógica de la proyectificación para dirigir el propio modo de vida, maximizar el capital humano y proporcionar una gobernanza liberal. La proyectificación y el yo proyectificado son relaciones y condiciones previas para las transformaciones estructurales en las sociedades neoliberales de la modernidad tardía. Para esbozar el lado oscuro de la proyectificación para la sociedad y los individuos, es necesaria una evaluación crítica de la subjetividad que conlleva. A continuación, se analizan tres dimensiones relevantes que tienen que ver con la forma de la subjetividad, su papel como modo de justificación y su precariedad. Aunque las repercusiones (negativas) del lado oscuro de la proyectificación y del yo proyectificado se extienden sin duda a otros ámbitos, se considera que los tres analizados aquí son los más relevantes para comprender el lado oscuro potencialmente peligroso.

La subjetividad: este capítulo comenzó con una cita de Michel Foucault que resume su interés epistemológico por las subjetividades y su producción; la crítica de Foucault a determinados mecanismos históricos o contemporáneos de subjetivación y subjetividades no es un juicio normativo. No son "malos" per se. A Foucault le preocupa cómo se han desarrollado históricamente las subjetividades y cómo constituyen al ciudadano moderno. La proyectificación constituye el yo proyectificado que responde a la libertad que otorga el neoliberalismo, pero al mismo tiempo, la proyectificación contiene un elemento invasor cuando proyecta —y cambia cualitativamente— la forma organizativa dominante de cooperación

social, integración social y relaciones con uno mismo para hacer hincapié en la temporalidad, los límites temporales y los plazos. Además, la proyectificación reconceptualiza las biografías y las etapas vitales como proyectos, haciéndolas manejables y controlables mediante métodos y técnicas de gestión de proyectos.

La proyectificación proporciona la lógica, los métodos y las técnicas para gestionar los distintos requisitos emergentes. Por encima de eso, la proyectificación sirve como tecnología de control, que se refiere a la orientación de la libertad individual de desarrollo. En principio, el yo proyectificado es libre de hacer y dejar lo que quiera, pero la proyectificación normaliza los efectos de esta libertad. Esto significa que la proyectificación acepta la desviación de las biografías estándar en un rango de tolerancia aceptable. Por ejemplo, los sujetos ad hoc organizan la educación, la cualificación adicional, la entrada en la carrera, el empleo remunerado, la familia u otras relaciones interpersonales. No obstante, las expectativas sociales estructuran los episodios individuales de las biografías: a los estudiantes, por ejemplo, se les anima a estudiar lo más rápido y eficazmente posible para aprovechar las oportunidades del mercado laboral, mientras que el tiempo libre y el ocio también se integran en la planificación cuando prometen beneficios para el desarrollo individual.

El yo proyectado debe utilizar la libertad que se le ha confiado e invertir en una biografía útil y "productiva". De este modo, todos los elementos biográficos se evalúan con una lógica económica. El lado oscuro de la proyectificación reside en la lógica de control del comportamiento individual, diseñada para encadenar permanentemente nuevos proyectos que aumenten el valor. En este proceso, todas las relaciones sociales adoptan la forma de un proyecto y se vuelven unidimensionales. El diseño de la vida, por tanto, sabe que los proyectos abundan y que los sujetos modelan sus vidas en consecuencia, de forma racional y flexible.

Justificación: Más arriba se ha descrito que la proyectificación y su forma de subjetividad, el yo proyectificado, sirven como modo de control de la libertad individual y las elecciones biográficas. La proyectificación sirve como fuente de valor y valoración de las decisiones individuales y las elecciones vitales. Este argumento hunde sus raíces en el pragmatismo francés (Boltanski y Chiapello, 2007; Boltan-ski y Thévenot, 2006). Las biografías son representaciones de identidades específicamente construidas. La proyectificación permite crear una narrativa coherente y significativa a partir de biografías fragmentadas y perturbadas. Además, la biografía proyectada conforma asimismo un factor legitimador del diseño flexible de la vida. Boltanski y Chiapello ven el proyecto como arquetipo de un nuevo espíritu del capitalismo que legitima las actividades (Boltanski y Chiapel-lo, 2007). En la "ciudad proyectiva" (Boltanski y Chiapello, 2007: 107), el énfasis de los estilos de vida individuales reside en la temporalidad, la flexibilidad y el trabajo en red, donde los sujetos son activos y buscan proyectos consecutivos. El estilo de vida del yo proyectificado se asemeja al de los nómadas y devalúa los vínculos

fijos y permanentes, al tiempo que valora el desarraigo y las relaciones sociales sin ataduras ni compromisos (Boltanski, 2006: 26).

La proyectificación —como metáfora de un cambio de "estado humano", así como una "cuestión filosófica" existencial (Jacobsson y Jałocha, 2021)— cambia la base de la vida y la autocomprensión del yo proyectificado. Se atribuye o revoca valor a los proyectos y a sus responsables, dependiendo de si un proyecto promete rentabilidad, éxito o progreso, mientras que el coste, el fracaso o la irrelevancia dificultan la justificación de su proyecto. El yo proyectificado tiene que promulgarse como valioso y lo hace a través de sus proyectos. Cuando el valor determina la elección de los proyectos y los resultados deseados, el yo proyectificado opera en una espiral de optimización de costes-beneficios, autosuperación, eficiencia y crecimiento (Berglund et al., 2020).

El lado oscuro de la proyectificación entra en juego cuando sólo se reconocen mecanismos de justificación unidimensionales y únicos para nuestras acciones. En particular, aquellos que persiguen la temporalidad y el cortoplacismo para amortiguar la incertidumbre y la complejidad a nivel individual, organizativo o social. El yo proyectificado expresa la circunstancia de que sólo las estructuras específicas del proyecto tienen valor (Berglund et al., 2020; Boltanski, 2006; Boltanski y Thévenot, 2006). Boltanski y Thévenot conciben varios modos de justificación que coexisten y sirven de base para argumentos contrapuestos. Sin embargo, el lado oscuro de la proyectificación amenaza esta coexistencia cuando una única justificación, la ciudad proyectiva, domina a las demás. Entonces, la única pregunta válida sigue siendo si sirve o no a sus proyectos. La limitación obvia es que la valoración sólo reconoce beneficios específicos y descuida los demás.

Precariedad: las transformaciones estructurales y su relación recíproca con la proyectificación favorecen vidas disruptivas que representan el "cambio metafísico en la percepción del tiempo, el espacio y el trabajo" (Jacobsson y Jałocha, 2021: 1597); la flexibilidad disuelve el contexto temporal y espacial estático de las biografías de los yoes proyectificados e impone temporalidad y ausencia de límites a las elecciones vitales. El trabajo y la ocupación están cada vez más proyectados y, por lo tanto, son temporales, una condición que es particularmente evidente en los campos científicos de empleo (Dollinger, 2020). La flexibilidad es un catalizador de la precariedad cuando altera la planificación de los subproyectos. El yo proyectizado se enfrenta a una creciente necesidad de adaptarse a proyectos a corto plazo y, con ello, a un impulso continuo de "volver a empezar", lo que significa adaptarse a condiciones previas nuevas o modificadas (Masquelier, 2017: 38-39).

La libertad que el neoliberalismo concede a los individuos tiene sus límites cuando los aspectos de la vida no pueden ser influidos por el individuo. Mientras que, por ejemplo, los estados de bienestar individualizan los riesgos de desempleo y llaman a los sujetos a invertir en su empleabilidad, el desempleo estructural queda fuera de la esfera de influencia individual. Los riesgos son sistémicos, mientras que las responsabilidades son individuales.

En este punto, las transformaciones estructurales del neoliberalismo —especialmente el acto de responsabilización— aumentan la vulnerabilidad de los individuos ante la precariedad. El lado oscuro de la proyectificación es su enfoque inherente en la flexibilización y la responsabilización, que crea incertidumbre para el yo proyectificado. El objetivo de la transformación estructural era "externalizar" esa incertidumbre de las organizaciones a los individuos, lo que aumenta la precariedad de los sujetos neoliberales.

*   *   *

El lado oscuro de la proyectificación como estado humano y como cuestión filosófica se presenta como una dinámica social opaca. En primer lugar, la proyectificación, entendida como respuesta a las transformaciones estructurales neoliberales, produce una forma específica de subjetividad: el yo proyectificado. Esta subjetividad es la clave para enfocar un lado oscuro de la proyectación en este ensayo: la flexibilización, la responsabilización y la racionalización generan requisitos para los individuos que éstos cumplen organizando sus vidas y esfuerzos en forma de proyectos. Sin embargo, con esta proyectificación y el yo proyectificado, surgen nuevos retos. En primer lugar, en el neoliberalismo la subjetividad del yo proyectificado es un modo de control para racionalizar el comportamiento humano. En segundo lugar, la proyectación y el yo proyectificado sirven como modo de justificación de las decisiones biográficas individuales y de su organización. El lado oscuro de la proyectificación reside en la valoración dominante de los proyectos que amenazan con superar otros modos de justificación. Sólo los proyectos prometen valor. En tercer lugar, la proyectificación y el yo proyectificado son socialmente vulnerables a las condiciones precarias tanto en el trabajo como en los asuntos privados, porque la proyectificación promueve lógicas disruptivas de temporalidad y orientaciones a corto plazo que contradicen la planificación a largo plazo y la continuidad.

La proyectificación propone una razón instrumental, con la que se puede hacer frente a problemas sociales contemporáneos específicos, pero también muy generales. La responsabilidad individualizada de elecciones de vida flexibles y responsables resuena con una lógica de proyecto que ofrece al yo proyectificado herramientas y técnicas para dominar sus propios proyectos. Las ciencias sociales críticas, especialmente la teoría crítica, han defendido con firmeza el hecho de que las herramientas, los instrumentos y, más en general, la razón instrumental no son apolíticos, sino que están integrados en el contexto social como parte de las relaciones de poder y dominación. El lado oscuro de la proyectificación reside precisamente en que se oculta este arraigo y las relaciones sociales se hacen invisibles, cuando la proyectificación parece ser una limitación fáctica sin alternativa. Por lo tanto, es necesario poner de relieve las limitaciones fácticas para ofrecer perspectivas en los casos en los que implican la necesidad de proyectos como última solución o "panacea" y en los que esas promesas siguen estando vacías y

son potencialmente amenazadoras tanto para los sujetos neoliberales como para los individuos.

5. El futuro de la proyectificación

Los proyectos han sido durante mucho tiempo un tema de investigación limitado a contextos corporativos. Lo que interesaba eran los proyectos, programas o carteras individuales en empresas gestionadas por profesionales de proyectos. Sólo recientemente, la investigación aborda la expansión de la proyectificación desde la gestión y el mundo corporativo a toda la sociedad y a todos los ámbitos de la vida privada. En la actualidad, los proyectos representan una descripción contemporánea de la sociedad y su enfoque funcional de la organización del trabajo (Lundin, 2016).

Sin embargo, queda por ver cómo sería una "sociedad post-proyectista" (Lundin, 2016: 13). El lado oscuro de la proyectificación depende de la perspectiva que adoptemos sobre los proyectos y la gestión de proyectos y, por tanto, de las diferentes nociones de proyectificación. El lado oscuro puede consistir en unas condiciones de trabajo potencialmente agotado-ras, unas condiciones ocupacionales vulnerables y unos estilos de vida que refuerzan negativamente y obligan a los sujetos a optimizar y comparar constantemente su "valía".

Este capítulo se ha ocupado de las cuestiones de los efectos estructurales de la proyectificación que afectan al yo proyectificado. Ha tratado de describir dónde reside el lado oscuro de la proyectificación para el individuo. La proyectificación es un cambio en los estados humanos y una cuestión filosófica (Jacobsson y Jałocha, 2021), que transforma las relaciones sociales con los demás, con el trabajo y la vida privada y con nosotros mismos. En la modernidad tardía, el interés epistemológico de las ciencias sociales radica en los efectos sociales que favorecen e impulsan tales cambios como la proyectificación: por ejemplo, la flexibilización, la responsabilización y la racionalización. En estos efectos se puede discernir un carácter instrumental que sustenta las formas de trabajar y vivir para lograr crecimiento, excedente y eficiencia. En una sociedad neoliberal, por lo tanto, los aspectos instrumentales de la proyectificación instan especialmente a la antropología y a la subjetividad a actuar y comportarse en consecuencia.

Sin embargo, el lado oscuro de la proyectificación que sin duda afecta a las condiciones de trabajo, las nuevas inseguridades, así como las prácticas moralmente cuestionables o reprobables, también son visibles en el pensamiento tardomoderno y neoliberal: por un lado, los efectos estructurales de la flexibilidad, la responsabilización y la racionalización apuntan a un determinado grado de libertad individual, con el que se entrelazan mutuamente; por otro lado, los efectos estructurales arraigan en la libertad y, al mismo tiempo, hacen posible la libertad en primer lugar.

La proyectificación en expansión necesita una investigación aún más intensa sobre sus causas estructurales y sus efectos específicos a todos los niveles: en las

organizaciones, en la sociedad, para los individuos, así como "metafísicamente". Esto también incluye los patrones de legitimidad con los que los yo proyectados justifican sus propios proyectos y las justificaciones con las que las personas utilizan o se niegan a utilizar la forma de proyecto. La instrumentalidad de los proyectos -son herramientas para resolver distintos problemas- presupone que los proyectos y la proyectificación son neutrales en cuanto a valores, lo que hace difícil captar su lado oscuro. Sin embargo, como se ha argumentado en este ensayo, el análisis de las transformaciones estructurales de las sociedades contemporáneas ofrece un punto de partida para comprender cómo los individuos o las instituciones justifican la proyectificación en respuesta a las nuevas necesidades.

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Proyectificación y asociaciones en dirección de proyectos

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Resumen

Este capítulo tiene como objetivo proporcionar información sobre el papel que desempeñan las asociaciones profesionales de dirección de proyectos para la proyectificación de la sociedad desde la perspectiva de la teoría institucional.

La información aquí recopilada está basada en un enfoque de métodos mixtos, por una parte sobre hallazgos de investigación de estudios cualitativos y uno cuantitativo, muy reciente, disponibles a la fecha en la bibliografía. Los resultados indican que la proyectificación de las sociedades en los países con economías más avanzadas continúa creciendo.

Los resultados aquí expuestos también pueden ayudar a crear una visión más sistémica ya que en base a ellos, las asociaciones de dirección de proyectos, pueden obtener una mejor comprensión del proceso de proyectificación y en consecuencia una mejor orientación acerca de la importancia de su función en el fenómeno de proyectificación social junto con su estado actual y evolución futura.

Por último, la aplicación de la teoría institucional a la proyectificación de la sociedad en el marco de este capítulo y en el contexto de la obra a la que contribuye, permite un análisis en profundidad de los procesos sociales subyacentes y las interacciones entre los actividades reguladoras, normativas y cultural-cognitivas de las asociaciones de dirección de proyectos, por un lado, e instituciones por el otro, a nivel social. Esto debería animar a nuevas y prometedoras perspectivas para incrementar las tareas de investigación al respecto.

Palabras clave: proyectificación, sociedad, instituciones, teoría institucional, dirección de proyectos.

1. Introducción

Desde la década de los años 60 del pasado siglo XX, las asociaciones de dirección de proyectos han asumido un papel cada vez más importante en el avance del conocimiento necesario para la gestión y dirección de proyectos (Morris, 2013), en la difusión de la idea de que la gestión profesional permite que los proyectos se implementen de manera más eficiente y también en la cualificación y certificación profesional del personal que interviene, gestiona y/o dirige el proyecto bajo sistemas acreditados (Hodgson & Muzio, 2012). Hoy en día, podemos encontrar asociaciones de dirección de proyectos en distintos ámbitos geográficos, nacionales, regionales e internacionales; p.e. a nivel regional, el Instituto de Gestión de Proyectos de Hong Kong, a nivel nacional la asociación española de dirección e ingeniería de proyectos AEIPRO, así como a nivel internacional la Asociación Internacional de Dirección de Proyectos-IPMA. También en áreas específicas, de sectores de actividades y económicos concretos tales como la Asociación Internacional de Gestión de Proyectos de Construcción o áreas temáticas, p.e. el Instituto Internacional de Gestión Legal de Proyectos, por lo que el grado de madurez de la asociación profesional varía mucho. Por ejemplo, la Asociación para la Gestión de Proyectos en el Reino Unido-APM ha logrado un reconocimiento masivo al obtener una Carta Real o *"Royal Charter"* (Hodgson et al., 2015). Por el contrario, tanto los directores de proyectos a nivel individual como muchas asociaciones nacionales en gestión y dirección de proyectos a nivel asociativo, en todo el mundo aún no han recibido el reconocimiento gubernamental apropiado por sus contribuciones a la gestión y dirección de proyectos (Nicklich et al., 2020).

Mas recientemente, a partir de la primera década del nuevo siglo, los proyectos han disfrutado de una creciente popularidad especialmente en los últimos años y se utilizan mayoritariamente en los sectores económicos de actividad, bien como una forma temporal de organizar empresas complejas, bien para introducir cambios y/o innovaciones o para crear nuevas empresas (Auschra et al., 2019). Especialmente en los tiempos actuales que exigen enfrentarse a importantes desafíos sociales, como la crisis derivada del cambio climático o la crisis generada consecuencia de la pandemia SARS-CoV-2(Covid19), existe una demanda creciente para enfrentarse a estos desafíos de manera sostenible mediante el uso de proyectos y la dirección profesional de dichos proyectos (Cerne y Jansson, 2019). Si bien la investigación ha explorado ampliamente la creciente prevalencia y el uso de proyectos en el mundo empresarial (Maylor y Turkulainen, 2019), hasta ahora ha faltado investigación empírica a nivel de la sociedad (Soderlund y Sydow, 2019). En particular sobre preguntas y planteamientos acerca de qué se puede hacer para escalar los conceptos de dirección de proyectos practicados en las empresas a otros sectores de la sociedad (Bogacz-Wojtanowska y Jalocha, 2016) y qué papel deberían desempeñar las asociaciones de dirección de proyectos en este proceso (Wagner et al., 2021).

La investigación en torno a la creciente prevalencia de proyectos en las empresas tiene su punto de partida con Midler (1995), quien a partir de un estudio integral realizado en la corporación del fabricante de automóviles Renault encontró que con el tiempo el número y la importancia de los proyectos aumentaron significativamente, y esto también tuvo un impacto en la estructura organizacional, la cultura y el trabajo en equipo en la corporación Renault. Él acuñó el término "proyectificación" para describir dicho hallazgo. Además, la difusión de proyectos va en aumento más allá del mundo empresarial hacia otros ámbitos de nuestra sociedad. Jensen et al. (2016) hablan incluso de "la proyectificación de todo", dando a entender que los proyectos son omnipresentes en los negocios y en la sociedad y en la vida de todos. Con referencia a las ciencias administrativas y organizacionales, el análisis de la sociología y la teoría institucional se ha centrado en las interacciones de la organización temporal y permanente dentro y entre organizaciones o redes de proyectos (Lundin, 2016; Sydow y Windeler, 2020).

Scott (2008a) enfatiza el arraigo de las organizaciones en un entorno institucional que moldea el comportamiento social y asegura la estabilidad y la previsibilidad a través de una variedad de reglas, normas e impresiones cultural-cognitivas. Aquí, las instituciones se entienden como estructuras sociales compuestas por elementos regulativos, normativos y cultural-cognitivos que, con actividades asociadas, moldean el comportamiento en una trayectoria específica (Scott, 2010). La investigación en dirección de proyectos ha involucrado la teoría institucional principalmente en proyectos (Soderlund y Sydow, 2019) y en el contexto de organizaciones orientadas a proyectos (Scott, 2012). Sin embargo, aún no se ha producido una aplicación al tema de la proyectificación social. Pero apenas si existen estudios, investigaciones acerca de cómo ocurre la proyectificación a este nivel, qué actores están involucrados y qué papel juegan las instituciones en este proceso de poyectificación social (Scott, 2008b; Barondeau y Hobbs, 2019). Algunas asociaciones profesionales parecen ser actores importantes en la proyectificación de la sociedad, ya que fomentan la creación, el mantenimiento o la disrupción de las instituciones (Lundin et al., 2015). A pesar de todo ello, se necesita más investigación para comprender mejor cómo se desarrolla la proyectificación a nivel social.

2. Fundamentos teóricos

Basándonos en la *"Escuela Escandinava"*, la investigación al respecto, durante los últimos años se ha centrado cada vez más en la integración y las interacciones de los proyectos dentro de su contexto (Jacobsson et al., 2016). El proyecto se entiende como una organización temporal con objetivos específicos, cuyos entregables pueden ser el desarrollo de un nuevo producto o el rediseño de una unidad organizativa, donde el proceso se construye sobre actividades anteriores y abraza el cambio dinámico (Bakker et al., 2016). Se argumenta que "los proyectos se han

vuelto intrínsecos a nuestras vidas" (Jensen et al., 2016, p. 22). Son protagoniza-
dos por diversos actores que entablan relaciones que "se disuelven y reconfiguran
a través de la práctica de la colaboración episódica en proyectos" (Henneberry y
Parris, 2013, p. 231). La realización de proyectos se ve afectada por el contexto
institucional, que al mismo tiempo ejerce influencia en su entorno inmediato y
más amplio (Soderlund y Sydow, 2019).

2.1. *Proyectificación de la sociedad*

Basándonos en la *"Escuela Escandinava"*, la investigación al respecto, durante
los últimos años se ha centrado cada vez más en la integración y las interacciones
de los proyectos dentro de su contexto (Jacobsson et al., 2016). El proyecto se
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más amplio (Soderlund y Sydow, 2019).

2.2. *La aplicación de la teoría institucional a la proyectificación*

Pensando más en la proyectificación, desde una conceptualización estrecha de
la proyectificación como transformación organizacional descrita por Midler (1995)
así como por Söderlund y Tell (2009), hacia *"un interés por los procesos culturales y
discursivos en una sociedad en la que se invocan las nociones de proyectos"* (Packendorff
y Lindgren, 2014, p. 7), los proyectos se caracterizan como constitutivos de la vida
social. Varios actores coordinan sus actividades conjuntas en redes temporales para
reencontrarse luego en otras constelaciones (Boltanski y Chiapello, 2018).

La teoría institucional parece adecuada para comprender mejor el proceso de
proyectificación desde una perspectiva más amplia, ya que *"considera los procesos
mediante los cuales las estructuras, incluidos los esquemas, las reglas, las normas y las
rutinas, se establecen como pautas autorizadas para el comportamiento social"* (Scott,
2005, pág. 461). La teoría institucional permite una visión integral de los actores
con sus relaciones y actividades conjuntas en un contexto institucional establecido
(Healey, 1992). Con la aplicación de la teoría se puede analizar tanto el efecto de
las instituciones sobre el proceso social como el efecto inverso de las instituciones
sobre el proceso.

2.3. *El papel de las asociaciones profesionales para la proyectificación*

Scott (2010, p. 13) señala el hecho de que *"en todos los campos, un conjunto diverso de 'intermediarios' evoluciona para facilitar o negociar intercambios, o para recopilar, organizar y evaluar información para afectar la interacción entre los 'principales'."* Como ejemplo de dichos intermediarios, señala a las asociaciones profesionales y a los profesionales como *"agentes institucionales"* (Scott, 2008a, b, p. 219). Morris y Geraldi (2011) también se refieren a las asociaciones profesionales, en particular las asociaciones de dirección de proyectos, cuando se trata de dar forma al entorno institucional de los proyectos. Las asociaciones de gestión y dirección de proyectos junto con los proveedores de servicios profesionales asociados (por ejemplo, consultores, formadores y capacitadores en dirección de proyectos) ya que estos profesionales tienen una capacidad estabilizadora y se supone que afectan positivamente a la proyectificación de la sociedad.

Por ejemplo, a través de acciones regulatorias, la asociación puede ejercer influencia sobre el contexto y las respectivas instituciones en las que opera e interacciona, otro ejemplo puede ser mediante contribuciones y apoyos normativos en el desarrollo de leyes y reglamentos que afectan el trabajo relacionado con el proyecto y, a su vez, afectar la promoción y generalización de los proyectos. Las acciones normativas de las asociaciones de dirección de proyectos a menudo tienen como objetivo desarrollar estándares relacionados con proyectos que se utilizan para cualificar y certificar profesionales. Finalmente, las acciones cultural-cognitivas tienen como objetivo difundir creencias y prácticas compartidas basadas en proyectos anteriores o modelos a seguir (Muzio et al., 2013). Por lo tanto, podemos concluir que con probabilidad las acciones de las asociaciones de dirección de proyectos influirán positivamente en la proyectificación de la sociedad y por ello Wagner et all. (2021) proponen las siguientes tres hipótesis:

H1. Las acciones regulatorias de una asociación de gestión de proyectos inciden positivamente en la proyectificación de la sociedad.

H2. Las acciones normativas de una asociación de gestión de proyectos inciden positivamente en la proyectificación de la sociedad.

H3. Las acciones cultural-cognitivas de una asociación de gestión de proyectos inciden positivamente en la proyectificación de la sociedad.

El papel de las asociaciones de gestión y dirección de proyectos se considera bastante crítico debido a su interés en mantener el statu quo en lugar de promoverlo (Hodgson et al., 2015) y su enfoque principal en las empresas, dando prioridad a sus intereses específicos y, por lo tanto, perdiendo de vista consideraciones sociales más amplias (Muzio et al., 2011).

El estado de desarrollo de las asociaciones de dirección de proyectos difiere entre países. La Asociación para la Gestión de Proyectos (APM) en el Reino Unido,

por ejemplo, recibió el Royal Chartership en 2017, que brinda un reconocimiento especial a la profesión de proyectos y oportunidades para los mismos a través de dicha asociación defendido la causa de la asociación y sus asociados (Hodgson et al., 2015). Sin embargo, esta situación es única y no puede ser imitada fácilmente por asociaciones de otros países. La situación parece ser bastante diferente en el Instituto para la Dirección de Proyectos (PMI) de EE. UU., en la Asociación para la Dirección de Proyectos de Estambul (IPYD) en Turquía, en la Asociación Alemana de Dirección de (GPM) en Alemania o en la Asociación Española de Ingeniería y Dirección de (AEIPRO) en España.

La mayor parte de las asociaciones nacionales en dirección de proyectos aún no ha obtenido el estatus de asociación profesional de pleno derecho (Nicklich et al., 2020) y todas ellas se esfuerzan por ganar terreno a través de ofertas como capacitación y certificación. Tradicionalmente se basa en la creación de redes de sus miembros, el intercambio de experiencias y el intercambio de historias de proyectos exitosos. Se pone gran énfasis en la educación, que va desde la escuela secundaria y la formación profesional hasta cursos avanzados de gestión de proyectos en universidades y corporaciones (Wagner, 2009).

El entrelazamiento y la interrelación de las actividades de las asociaciones de dirección de proyectos con las instituciones y otros actores se han explorado, por ejemplo, en Italia (Sabini y Paton, 2021). Esto nos muestra que el camino hacia la proyectificación se intentó primero a través de acciones regulatorias del gobierno. Posteriormente, y debido sobre todo a la influencia de las asociaciones internacionales, de la Unión Europea (en el caso específico de Europa) y la presión de la economía, especialmente en determinados sectores de actividad, se aplicaron acciones normativas, como el establecimiento de estándares para la dirección de proyectos. Por lo tanto, depende en buena media de las instituciones sociales existentes el cómo se desarrollan las acciones de una asociación de dirección de proyectos en el camino hacia la proyectificación de la sociedad (Sabini y Muzio, 2017).

Las siguientes hipótesis reflejan estos pensamientos (Wagner et all, 2021):

H4.   Las instituciones sociales median los efectos de las acciones de las asociaciones de dirección de proyectos en la proyectificación de la sociedad.
H4a. Las instituciones reguladoras median el efecto positivo de las acciones reguladoras en la proyectificación de la sociedad.
H4b. Las instituciones normativas median el efecto positivo de las acciones normativas en la proyectificación de la sociedad.
H4c. Las instituciones cultural-cognitivas median el efecto positivo de las acciones cultural-cognitivas en la proyectificación de la sociedad.

En conclusión, podemos afirmar que en base a la literatura y a los recientes estudios encontrados la creciente difusión de proyectos ha sido reconocida hasta

el momento principalmente en el contexto del mundo empresarial, y solo en los últimos años se ha explorado a nivel de la sociedad. Sin embargo, solo existen análisis empíricos para la economía (Henning y Wald, 2019). Otros sectores de la sociedad, así como la sociedad en general, aún deben ser motivo de investigación. Aún falta un análisis empírico más detallado acerca de qué actores impactan en qué instituciones y cómo esto afecta la proyectificación de la sociedad.

Mientras que la literatura atribuye un papel importante a las asociaciones de dirección de proyectos para la profesionalización de la misma y la difusión de proyectos en general (Muzio et al., 2011), sin embargo, no queda claro cómo las asociaciones de dirección de proyectos ejercen su influencia, de qué manera y qué tan fuerte es esta influencia en comparación con otros actores.

2.4. *Una visión crítica de las asociaciones profesionales en dirección de proyectos y la proyectificación*

El desarrollo de la disciplina de la dirección de proyectos está en sus orígenes íntimamente ligado a la ingeniería en énfasis en proyectos para la industria de defensa o aeroespacial, especialmente tras la finalización de la Segunda Guerra Mundial, que implicó resolver problemas complejos usando modelos matemáticos, aplicar ciencias de la computación e investigación basada en operaciones (Morris, 2013). Proyectos y su dirección son aceptados en muchas áreas de la economía y cada vez más en la sociedad y ahora son parte de la vida cotidiana (Hodgson & Cicmil, 2006).

Los organismos profesionales han apoyado la difusión de la disciplina de dirección de proyectos con el desarrollo de un cuerpo de conocimiento (BoK), que describe los pasos esenciales del proyecto y su gestión desde las fases de inicio hasta su finalización, desde un procedimiento o una perspectiva metodológica. A su vez esto puede interpretarse como un intento de ciertas asociaciones nacionales con clara proyección en influencia internacional para establecer una barrera de entrada o capacitación como requisito previo en el camino a la profesionalización y con ello trazar los límites entre los miembros de la dirección del proyecto profesión y otras profesiones (Morris et al., 2006).

Los directores de proyecto prestan sus servicios, desarrollan sus actividades profesionales en sus organizaciones y muchas veces tienen que justificar que es lo que les permite dirigir proyectos de manera exitosa al pertenecer a un organismo profesional internacional y haber adquirido los conocimientos descritos en un BoK específico, y posiblemente incluso probando que tienen la certificación adecuada, les da una legitimidad que ayuda a que su trabajo sea mejor reconocido. Sin embargo, la orientación de BoKs también puede observarse de manera crítica, en particular aquellos que condensan y resumen en un conciso libro un todo de forma indiferenciada. Especialmente la crítica comenta que estos libros BoK difí-

cilmente se basan en resultados de investigación que darían legitimidad (Shepherd y Atkinson, 2011).

Incluso si otros organismos profesionales han tomado caminos diferentes en el desarrollo de modelos de procesos, las ideas básicas para la gestión y dirección de proyectos siguen estando representadas hoy en la literatura, normas nacionales e internacionales y estándares específicos para ciertos sectores de actividad de igual manera o similar a la de un BoK. En términos de contenido, los BoK disponibles son criticados por centrarse demasiado en la ejecución de proyectos y abordar demasiado poca atención a sus condiciones marco, el proceso de inicialización y clarificación de objetivos, o cómo lograr la integración social. Esto juega un papel esencial en el concepto de sostenibilidad de los proyectos con énfasis en el impacto del mismo en la Sociedad.

Con el desarrollo de la serie de normas ISO/IEC 21500, aspectos de sostenibilidad para la gestión y gobernanza de proyectos, programas y carteras de proyectos fueron incorporados. Las asociaciones miembros de IPMA decidieron tomar un camino diferente en la década de 1990 (Pannenbäcker, 2001) ya que optaron por un estándar basado en competencias que hoy, con la Línea de Base de Competencia Individual de IPMA (IPMA ICB) en su cuarta versión, define las competencias para la dirección de proyectos. Esta línea de base no es un BoK y cubre tres áreas de competencia: competencias de práctica, de personas y de perspectiva. También críticas a la ICB en relación con aspectos de sostenibilidad han sido expuestas (Silvius, 2017), aunque la mayor crítica proviene de Shepherd y Atkinson (2011) acerca de la posible falta de fundamento científico aplicable a la ICB.

Junto con el desarrollo de las normas y estándares para la gestión de proyectos, los organismos profesionales establecieron y comercializaron con éxito ofertas para la cualificación y certificación del personal del proyecto. A pesar de la base para la mayor parte de dichas ofertas está basada en BoK's diferentes o una base de referencia de competencias, estas actividades ayudan a las asociaciones nacionales a generar ingresos para financiar otras actividades de voluntariado.

Al mismo tiempo, la calificación y la certificación también atraen nuevos miembros para que las asociaciones nacionales y sus organismos certificadores representen a varios millones de directores de proyectos en todo el mundo. Resultados de investigaciones recientes acerca del valor que la certificación profesional aporta para los directores de proyecto establecen una clara relación entre la certificación profesional y el desempeño de los directores y de sus proyectos (Blomquist et al., 2018). También esto ayuda a que los directores de proyecto y sus empleadores se beneficien de un mayor grado de confianza entre sí y del profesionalismo en los proyectos (Farashah et al., 2019).

Otro punto de crítica con respecto a las asociaciones de dirección de proyectos es la tendencia a centrarse en el mundo de los negocios. Como profesión emergente, se preocupan por el marketing, la prestación de sus servicios y así beneficiar especial-

mente a las empresas (Muzio et al., 2011). Esto puede incluir la promesa implícita de una mayor eficiencia a través de la aplicación profesional de la dirección de proyectos, una mayor eficacia de los directores de proyecto a través de su certificación en particular e incluso en general una unión profesional entre la empresa como empleador, el certificado y la pertenencia a la asociación nacional como organismo profesional.

La principal crítica aquí es que las asociaciones profesionales en dirección de proyectos solo *"predican a los que ya están convertidos"* y pasan por alto o no consideran otros ámbitos sociales de aplicación (Wagner et al., 2021). Esto se refleja en la membresía, dirigida principalmente a directores de proyectos (individuos), asociados miembros corporativos, especialmente empresas y sus vínculos entre otros grupos sociales. Como resultado, son los pocos casos en las que las asociaciones nacionales apoyan o impulsan proyectos para la protección social, inclusión y/o iniciativas de ayuda al desarrollo y cooperación en proyectos comunitarios.

3. Las asociaciones en dirección de proyectos y su papel en la proyectificación de la sociedad, un reciente caso de investigación en Alemania

La investigación fue desarrollada y publicada por Wagner et al (2022) basándose en la evaluación de la colinealidad del modelo estructural.

Consecuencia de las evidencias y hallazgos obtenidos se concluye que las acciones regulatorias de las asociaciones de dirección de proyectos no muestran efectos directos significativos en la proyectificación de la sociedad. Por lo tanto, las hipótesis anteriormente indicadas H1, H2 y H3 no son compatibles. En cambio, sí podemos encontrar efectos positivos significativos de las acciones de la asociación alemana en sus respectivas instituciones, que presentan las condiciones necesarias para los efectos de mediación propuestos para la hipótesis H4. En relación con el apoyo inicial de la hipótesis H4a, el citado estudio indica que las acciones regulatorias afectan positivamente a las instituciones regulatorias, las acciones cultural-cognitivas se relacionan positivamente con las instituciones cultural-cognitivas y las instituciones regulatorias y cultural-cognitivas muestran efectos positivos significativos en la proyectificación de la sociedad. Sin embargo, las instituciones normativas no afectan significativamente la proyectificación de la sociedad.

Con el fin de validar las hipótesis de mediación, el estudio indica que se investigaron los efectos directos e indirectos de las acciones de las asociaciones en dirección de proyectos en la proyección de la sociedad. Las relaciones directas de las acciones de dichas asociaciones en la proyectificación de la sociedad no fueron significativas. Sin embargo, las acciones regulatorias y cultural-cognitivas mostraron efectos indirectos significativos a través de las respectivas instituciones. Las acciones normativas no mostraron un efecto indirecto significativo.

Por lo tanto, siguiendo a Zhao et al. (2010), los resultados indican plena influencia para los efectos de las acciones regulativas y cultural-cognitivas que

emanan de las asociaciones en dirección de proyectos, mientras que las acciones normativas no ayudan a favorecer el progreso directa o indirectamente de la proyectificación de la sociedad.

3.1. *La interacción de instituciones y asociaciones de dirección de proyectos*

Mientras que la teoría institucional se ha aplicado hasta ahora principalmente en el contexto de los proyectos (Söderlund y Sydow, 2019) y la organización basada en proyectos (Narayanan y Huemann, 2021), en la presente contribución, esta teoría se ha conectado con el proceso de proyectificación a nivel social (Wagner et all, 2021).

La teoría institucional se utilizó como modelo explicativo para examinar las interacciones entre instituciones y actores y cómo cada uno, solo o en conjunto, influye en el proceso de proyectificación. Se ha prestado especial atención al papel de las asociaciones de gestión de proyectos.

Si bien la literatura (Scott, 2010; Lundin et al., 2015) sugiere que las asociaciones de dirección de proyectos tienen una influencia considerable en la proyectificación de la sociedad, las hipótesis 1 a 3 se utilizaron para examinar si las acciones regulativas, normativas y cultural-cognitivas de las asociaciones de gestión de proyectos afectan la proyectificación de la sociedad. Sorprendentemente, estas tres hipótesis no pudieron confirmarse. Significa que las acciones de las asociaciones de dirección de proyectos no influyen directamente en la proyectificación. Una explicación para este hallazgo podría ser que otros actores organizacionales (por ejemplo empresas representativas) tienen una influencia más significativa y bastante directa en el proceso de proyectificación mayor que la ejercida por la asociación de dirección de proyectos, puesto que según las evidencias, esta última no llega a toda la sociedad con sus actividades, o que, por extrapolación, las actividades de las asociaciones de dirección de proyectos no son lo suficientemente efectivas. Esto es consistente con el análisis de datos secundarios sobre la dirección estratégica de la asociación alemana de dirección de proyectos-GPM, la cual a la fecha y según dicho estudio, todavía no ha enfocado explícitamente sus actividades en el bien común y el apoyo a la sociedad (Wagner et al, 2021).

Sin embargo, los resultados muestran que las acciones de dicha asociación de dirección de proyectos tienen un efecto indirecto, es decir, a través de las instituciones mediadoras en la proyectificación de la sociedad. En este contexto, las acciones dirigidas a las instituciones cultural-cognitivas exhiben el mayor impacto en la proyectificación, seguidas de las acciones dirigidas a las instituciones reguladoras. Por lo tanto, de acuerdo con dicho estudio las hipótesis 4a y 4c fueron respaldadas, mientras que el camino a través de las instituciones normativas no es significativo y, por lo tanto, la hipótesis 4b no estuvo respaldada. Además, los resultados de la investigación sugieren que no son las regulaciones coercitivas o las normas do-

minantes las que fomentan la difusión de los proyectos como lo pretende GPM, sino principalmente la comprensión del propósito, los valores correspondientes y la creencia en los proyectos como un medio para alcanzar metas ambiciosas. En conjunto, esto contrasta con la visión prevaleciente en la literatura, según la cual se asumía que la proyectificación ocurre principalmente a través de las acciones e instituciones regulativas y normativas tales como las leyes y reglamentos que prescriben los gobiernos (Sabini y Paton, 2021), o a través de las asociaciones de dirección de proyectos que operan organismos para la certificación profesional de personas que desempeñan roles en la dirección de proyectos (Hodgson, 2002).

A diferencia de la visión predominante en la investigación (Hodgson y Muzio, 2012) de que son principalmente las asociaciones de dirección de proyectos a través de instituciones normativas y reguladoras las que ejercen influencia en la proyectificación de la sociedad, estos resultados revelan nuevos modos de interacción. En particular, el estudio amplía la visión para incluir actores como empresas y emprendedores ejemplares que, en comparación directa, tienen más influencia en la proyectificación que las asociaciones porque moldean positivamente la imagen de los proyectos y es más probable que convenzan a otros actores de la relevancia de la gestión de proyectos dando ejemplo.

Una contribución clave de esta investigación es que la proyectificación de la sociedad puede explicarse a través de la lente de la teoría institucional como un proceso social que implica interacciones entre los actores, sus acciones y las instituciones sociales. Las instituciones asumen un papel mediador, reforzando las actividades de los actores y ejerciendo así influencia en la proyectificación. En particular, los resultados identifican la dirección y el modo de efecto que tienen las acciones de las asociaciones de dirección de proyectos en la proyectificación de la sociedad a través de ciertas instituciones.

Además, según el estudio, parece quedar claro que el proceso de proyectificación está en curso y puede ser respaldado si median acciones intencionadas. Dado que el enfoque del estudio de la referencia estaba circunscrito al ámbito de las asociaciones de dirección de proyectos, estas pueden reconsiderar su posicionamiento estratégico y apoyar la proyectificación con acciones intencionadas basadas en los hallazgos del estudio y en este documento resumidos. Además, los resultados de dicha investigación brindan a los responsables de todos los niveles de la sociedad información sobre un fenómeno importante que requiere respuestas adecuadas, especialmente en tiempos de transcendentes desafíos sociales, tales como el cambio climático y la pandemia SARS-CoV-2 (Covid19).

El estudio de la referencia supone la primera aplicación empírica de la teoría institucional al proceso de proyectificación a nivel de la sociedad y con foco en las relaciones fundamentales. Futuros estudios podrían profundizar en los procesos de proyectificación, teniendo en cuenta otros actores, como empresas o emprendedores ejemplares (Lundin et al., 2015; Kalff, 2017).

Por ejemplo, el modelo de ecuaciones estructurales podría utilizarse para determinar si esos actores contribuyen directa o indirectamente a la proyectificación de la sociedad y qué papel juegan las instituciones en este proceso. Las instituciones normativas no afectan significativamente la proyectificación de la sociedad.

Finalmente, para validar las hipótesis de mediación, se investigaron los efectos directos e indirectos de las acciones de las asociaciones de dirección de proyectos en la proyectificación de la sociedad. Las relaciones directas de las acciones de estas asociaciones en dirección de proyectos en la proyectificación de la sociedad no fueron significativas. Sin embargo, las acciones regulatorias y cultural-cognitivas mostraron efectos indirectos significativos a través de las respectivas instituciones sobre la proyectificación de la sociedad. Las acciones normativas no muestran un efecto indirecto significativo.

Por lo tanto, siguiendo a Zhao et al. (2010), los resultados indican plena mediación para los efectos de las acciones regulativas y cultural-cognitivas de las asociaciones de dirección de proyectos, mientras que las acciones normativas no afectan directa o indirectamente la proyectificación de la sociedad. Por lo tanto, los resultados admiten las hipótesis H4a y H4c, mientras que la hipótesis H4b no es compatible.

4. Algunas conclusiones y posibles pasos a seguir

En este capítulo se ha pretendido destacar el actual desempeño, así como el potencial que tienen las asociaciones de dirección de proyectos en general y especialmente en tiempos de grandes desafíos, tales como la pandemia SARS-CoV-2 o el recrudecimiento de la crisis climática. Por ejemplo, las asociaciones podrían conectarse cada vez más con grupos sociales fuera de la economía y trabajar con ellos para desarrollar soluciones a los desafíos mencionados anteriormente. Especialmente el estudio cuantitativo más reciente y resumido en el apartado 3º, proporciona indicadores claros para una nueva dirección. Por ejemplo, las asociaciones de gestión y dirección de proyectos pueden ser mucho más efectivas a través de acciones cultural-cognitivas, tal vez mediante la promoción de la imagen actual de los proyectos y de su dirección, o a través de la difusión de casos de éxito que animan, inspiran a otros a seguir su ejemplo. En este sentido, me gustaría invitar al lector a abrir la puerta para una mayor exploración de la proyectificación a nivel de la sociedad, trayendo consigo implicaciones no solo teóricas sino también prácticas.

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CAPÍTULO 11

Proyectificación y Certificación Profesional

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Resumen

El propósito de la certificación profesional es establecer un estándar de conocimiento y experiencia en una profesión en particular, y proporcionar un medio para que las personas demuestren su competencia a los empleadores, clientes y la sociedad en general. Los sistemas de certificación profesional han tenido un amplio desarrollo en la profesión de la dirección de proyectos y constituyen una herramienta esencial para incrementar la cualificación de los directores de proyectos y promover tanto la competencia individual como la madurez de las organizaciones que desarrollan e implementan proyectos, por lo que pueden ser un instrumento de apoyo para mejorar la eficiencia en el uso de recursos así como acelerar el proceso de proyectificación de la sociedad.

Palabras clave: Certificación profesional; Dirección de proyectos; Sistemas de certificación profesional; Madurez en dirección de proyectos y proyectificación.

1. Introducción y objeto del capítulo

El objeto de este capítulo es estudiar los sistemas de certificación profesional de dirección de proyectos, sus características, ventajas, debilidades y posibles inconvenientes, con el fin de determinar su potencial contribución al proceso de transformación de la industria, las empresas, y de la sociedad en general, proceso denominado proyectificación.

La certificación profesional en dirección de proyectos se analiza como un caso particular de la certificación profesional existente para el conjunto de profesiones, discutiendo su origen y evolución, sus beneficios e inconvenientes, su aplicabilidad a las diferentes profesiones, y su posición en el marco global de evaluación de la conformidad.

Posteriormente se analizan los diferentes sistemas de certificación profesional en dirección de proyectos existentes, las instituciones responsables de su desarrollo y funcionamiento, y se discute su contribución al nivel de éxito en el desarrollo y ejecución de los proyectos, así como al de la disciplina y la profesión de dirección de proyectos.

Finalmente se presenta la forma en la que los sistemas de certificación profesional en dirección de proyectos pueden contribuir al proceso de proyectificación de la Sociedad.

2. Certificación Profesional

2.1. *Concepto y definición de certificación profesional.*

La certificación profesional es un proceso mediante el cual una institución u organismo calificado evalúa y verifica las habilidades, conocimientos y/o competencias de un individuo en una profesión o actividad específica.

Este proceso generalmente implica la realización de un examen o evaluación para medir el dominio del individuo en dicha actividad. Una vez que se ha demostrado que la persona cumple con los requisitos establecidos por la institución u organismo con capacidad para realizar dicha evaluación, se le otorga un **certificado** que valida sus habilidades y conocimientos en esa área.

Las certificaciones profesionales suelen ser otorgadas por **organizaciones profesionales**, asociaciones industriales u otros organismos que disfrutan de un reconocimiento, por la administración o por el mercado, como autoridades en un campo en particular. El proceso de certificación puede implicar cumplir con ciertos requisitos previos de educación o experiencia, aprobar un examen, presentar un portafolio de trabajo o completar otros tipos de evaluaciones.

Los motivos por los que una persona decide tratar de obtener una certificación profesional son muy variados, desde mejorar su empleabilidad hasta mejorar la autoestima profesional. Dado que éste es un aspecto fundamental, posteriormente se tratará en detalle. Además, en algunas profesiones, es posible que se requiera una certificación para ejercerlas o trabajar en ciertos roles o puestos de trabajo específicos.

2.2. *Orígenes, evolución e implantación de la certificación profesional.*

Los sistemas de certificación profesional han evolucionado con el tiempo como un medio para establecer niveles de competencia y estándares de profesionalismo en varios campos. Los orígenes de la certificación profesional se remontan a los gremios medievales, que se establecieron para regular y controlar la práctica de diversos oficios y profesiones. En los siglos XVI y XVII aparecen asociaciones profesionales reconocidas por el estado en campos como la medicina y el derecho, y en

el siglo XIX sucede lo mismo con profesiones más recientes como las ingenierías. Estas asociaciones establecieron códigos de ética y estándares de práctica para sus miembros y, en algunos casos, comenzaron a ofrecer planes de formación específica, y posteriormente programas de certificación para reconocer a las personas que habían demostrado cierto nivel de experiencia y competencia en su campo.

Actualmente los sistemas de certificación profesional se han vuelto más formales y estandarizados, combinando requisitos de educación, demostración de experiencia y pruebas teórico-prácticas, diseñados para garantizar que los profesionales certificados se desempeñen adecuadamente en su ámbito profesional, a la vez que se han multiplicado las asociaciones profesionales y organizaciones independientes que ofrecen una amplísima gama de certificaciones para diversas profesiones e industrias, frecuentemente compitiendo entre sí en régimen de mercado (Guerrero-Chanduví et al., 2010).

Las actividades profesionales en las que pueda tener sentido o utilidad la implantación de un sistema de certificación profesional son aquellas en las que exista la necesidad de establecer confianza, garantizar competencia y diferenciar a los profesionales. Entre las profesiones en las que los sistemas de certificación profesional han logrado un mayor crecimiento y reconocimiento se encuentran las del ámbito sanitario, la educación, la contabilidad y finanzas, la rama inmobiliaria, las ingenierías, las tecnologías de la información, y la dirección de proyectos, objetivo principal de este capítulo.

Sin embargo, existen profesiones en las que es más difícil desarrollar un sistema de certificación profesional. Por ejemplo, en profesiones que son muy subjetivas y difíciles de medir, como las artes creativas, no es fácil desarrollar un procedimiento de evaluación que refleje con precisión el talento, la habilidad o la experiencia de una persona. De manera similar, en profesiones que son altamente especializadas y con un pequeño número de practicantes, puede ser difícil o poco práctico establecer un sistema de certificación que sea ampliamente reconocido o aceptado.

2.3. *Beneficios de la certificación profesional*

Los sistemas de certificación profesional ofrecen una gran variedad de beneficios para las diferentes partes interesadas, incluidos individuos, empresas y organizaciones y la comunidad profesional en general.

Algunas de las principales ventajas de la implantación y extensión de los sistemas de certificación profesional son:

- Demostrar experiencia, credibilidad y competencia en un campo determinado.
- Mejorar las oportunidades profesionales y las expectativas salariales.
- Promover las buenas prácticas y mejorar el desempeño de una organización.
- Facilitar el avance, desarrollo y prestigio de una profesión.

- Mejorar la seguridad y la protección públicas en actividades profesionales críticas.

Resulta de interés ordenar las ventajas de la certificación profesional en función de los actores a los que se orientan las mismas, tal como se muestra en la Tabla 1.

Tabla 1: Clasificación de las Ventajas ofrecidas por la certificación profesional.

Actores o partes involucradas beneficiados	Tipos de beneficio
Para los profesionales individuales	• Diferenciación: Una certificación profesional (C.P.) puede ayudar a diferenciar a un profesional de otros profesionales no certificados y aumentar su visibilidad en los procesos de selección. • Desarrollo profesional: Una C.P. puede proporcionar un conjunto de herramientas y técnicas que el profesional puede aplicar en su trabajo diario. También puede ayudar a los profesionales a mantenerse actualizados en su campo y mejorar sus habilidades y conocimientos. • Reconocimiento: Una C.P. puede proporcionar reconocimiento por las habilidades y conocimientos adquiridos por un profesional. Este *reconocimiento puede ser nacional o internacional según el carácter de la organización certificadora.*
Para las empresas y organizaciones empleadoras	• Confianza: Una C.P. puede generar confianza (interna para la organización, y hacia los clientes) en la cualificación y competencia de un empleado o candidato. (Turner & Müller, 2003) • Mejora de la calidad: Al contratar profesionales certificados, las empresas pueden uniformizar y mejorar la calidad de sus productos y servicios. • Cumplimiento de estándares: Las empresas pueden demostrar su cumplimiento con estándares específicos al contratar profesionales certificados.

Actores o partes invo-lucradas beneficiados	Tipos de beneficio
Para las empresas y organizaciones contratantes (clientes) y para el público en general	• Confianza: Los clientes, y el público en general, puede tener más confianza en que los servicios prestados por profesionales certificados son de calidad adecuada, y acordes a las mejores practices disponibles. • Protección: Un sistema de C.P. puede ayudar a proteger al público, al garantizar que los profesionales cumplan con ciertos estándares de competencia.

Se observa que estas ventajas requieren que la certificación profesional garantice que los profesionales mantengan sus conocimientos actualizados y apliquen las mejores prácticas existentes en la profesión. Por tanto, una certificación profesional no puede tener validez indefinida y requiere mecanismos para asegurar que los profesionales certificados no hayan dejado de ejercer la profesión. Esto justifica la necesidad de que periódicamente los profesionales superen procesos de recertificación en el que aporten evidencias de que siguen en activo en la profesión y realizan actividades de actualización y perfeccionamiento profesional.

2.4. *Requisitos exigibles a un sistema de certificación profesional.*

Para que un sistema de certificación profesional sea verdaderamente útil y aporte valor al desarrollo de una profesión, debe tener las siguientes características:

- Poseer estándares claros, robustos y bien definidos que reflejen los conocimientos, habilidades y competencias requeridas para el ejercicio exitoso de la profesión.
- Ser riguroso y exigente, de manera que los candidatos deban demostrar un alto nivel de dominio y competencia en su campo.
- Ser reconocido por empleadores, clientes y otras partes interesadas como un indicador de fiabilidad y prestigio profesional.
- Estar actualizado con las últimas tendencias, desarrollos y mejores prácticas de la industria.
- Promover el aprendizaje y desarrollo continuo entre los profesionales certificados.
- Garantizar la rigurosidad e imparcialidad en sus procedimientos de evaluación, concesión, mantenimiento y retirada de los certificados, contribuyendo a la confianza pública en el sistema.

Los sistemas de certificación profesional frecuentemente se establecen y desarrollan por colegios y asociaciones profesionales, pero también existe la posibilidad de que sean creados y gestionados por instituciones independientes. Si bien las asociaciones profesionales pueden proporcionar valiosos sistemas de certificación para sus miembros, las organizaciones de certificación independientes pueden brindar una opción alternativa para los profesionales que pueden no ser miembros de una asociación en particular o que pueden estar buscando certificaciones adicionales más allá de las proporcionadas por su asociación profesional de referencia.

2.5. *Inconvenientes o efectos indeseados en una profesión de los sistemas de certificación profesional*

Si bien los sistemas de certificación profesional ofrecen numerosas ventajas, también existen algunos inconvenientes potenciales o daños colaterales que la extensión de los sistemas de certificación profesional puede llegar a causar en una profesión. Algunas de las principales críticas a dichos sistemas son:

- Barreras de entrada: la certificación puede requerir mucho tiempo y ser costosa, por lo que puede crear barreras de entrada para las personas con menor disponibilidad de recursos, reduciendo la diversidad e inclusión en la profesión y evitar que personas con la capacitación adecuada accedan la misma.
- Freno a la innovación: los sistemas de certificación profesional pueden tardar en adaptarse a los cambios dentro de una disciplina, lo que puede ralentizar las innovaciones, siendo menos probable que los profesionales certificados adopten nuevas prácticas o técnicas si no están reconocidas por el sistema de certificación.
- Énfasis excesivo en las credenciales: los empleadores pueden enfatizar demasiado en la importancia de la certificación sobre otros factores como la experiencia, las habilidades y el talento.
- Falta de armonización: Los sistemas de certificación pueden variar en cuanto a su rigor, requisitos y nivel de reconocimiento, lo que puede generar confusión entre los empleadores y otros actores (mercado, administración o público en general) sobre el significado y el valor de las diferentes certificaciones.

2.6. *La certificación profesional en el marco global de la evaluación de la conformidad*

El marco global de evaluación de la conformidad se refiere al conjunto de normas y directrices internacionales que rigen el proceso según el cual se verifica que los productos, servicios y sistemas cumplen determinados requisitos o normas, con el fin de facilitar el comercio y el acceso a los mercados generando confianza

entre productores y consumidores (ISO/CASCO, s.f.). Este marco incluye una serie de elementos clave, entre ellos:

- Normas internacionales para la evaluación de la conformidad (normas sobre sistemas de gestión, ensayos y calibración, certificación de productos, etc.)
- Los procesos de acreditación, a través de los cuales una organización independiente (organismo de acreditación) evalúa la competencia e imparcialidad de las organizaciones que llevan a cabo actividades de evaluación de la conformidad.
- Los procesos de certificación, en los que una organización independiente (organismo de certificación) evalúa y verifica que un producto, servicio o sistema cumple determinados requisitos o normas.
- Las pruebas e inspección para permitir verificar que los productos, servicios y sistemas cumplen determinados requisitos o normas mediante inspecciones físicas y pruebas de laboratorio.
- Los acuerdos de reconocimiento mutuo establecidos entre países o regiones para reconocer los resultados de las actividades de evaluación de la conformidad de la otra parte.

Un ejemplo de la utilidad de la evaluación de la conformidad puede darse cuando un cliente o comprador analiza la adquisición de un producto (o un servicio), y requiere conocer si el producto ofrecido por un determinado proveedor se va a ajustar a sus expectativas, características y requerimientos, cumpliendo o no con las especificaciones que publicita.

Para los consumidores, la evaluación de la conformidad es un beneficio que les proporciona información confiable a la hora de seleccionar los productos o servicios que desean adquirir. A los fabricantes y proveedores les permite garantizar que sus productos y servicios cumplen con los requisitos y especificaciones que exige el mercado. Habitualmente, cuando la comercialización de algún producto o servicio puede presentar algún riesgo para la salud pública, el medio ambiente o la seguridad, la legislación convierte en obligatorios determinados procedimientos de evaluación de la conformidad.

Por tanto, cuando se analiza las características y desempeño de un sistema de certificación profesional, hay que entender que no es un sistema totalmente original y único, sino que debe poseer una estructura y organización coherente con el marco global de la evaluación de la conformidad.

La Norma ISO/IEC 17000:2020 establece que la evaluación de la conformidad incluye las actividades de ensayo, inspección, validación, verificación, certificación y acreditación (ISO, 2020). En ella se define la certificación como una declaración de tercera parte relacionada con productos, procesos, sistemas o personas, que indica el cumplimiento de requisitos específicos. También especi-

fica los principios y requisitos de competencia, coherencia e imparcialidad de los organismos de certificación y del proceso de certificación.

Mientras la certificación es una actividad comercial realizada por empresas en libre competencia y dirigida a todo tipo de empresas, la acreditación es una actividad de interés general dirigida exclusivamente a los organismos de evaluación de la conformidad (Laboratorios, Entidades de Inspección, Entidades de Certificación y Verificadores), que en el caso de la Unión Europea debe ser ejercida por un único organismo de acreditación en cada estado miembro bajo la supervisión por la Administración y que dispongan de autoridad pública (EC, 2008).

Debe considerarse que los sistemas de certificación profesional evalúan el desempeño y competencia laboral de personas, no de productos y servicios, y existen estándares específicos para dicha evaluación. La norma ISO/IEC 17024 (ISO, 2012) rige la certificación de personas, y establece los requisitos generales para los organismos que certifican personas en cualquier campo, incluyendo habilidades, conocimientos y competencias. La norma se centra en la imparcialidad, la competencia del personal, la confidencialidad y la transparencia en el proceso de certificación (Sebastián-Jiménez & González-Gaya, 2015). Esta norma también establece la obligatoriedad de que el Sistema cuente con los correspondientes procedimientos de vigilancia para el mantenimiento, renovación (habitualmente denominada recertificación) y/o retirada de la Certificación.

Por tanto, si una institución desea establecer un sistema de certificación profesional con las máximas garantías de calidad, rigor, robustez y credibilidad, debería crear un organismo de certificación capaz de cumplir las exigencias de la ISO/IEC 17024, y superar un proceso de acreditación del cumplimiento de dicha norma.

3. Sistemas de certificación profesional en dirección de proyectos

3.1. *Pertinencia de los sistemas de certificación profesional en el ámbito de la dirección de proyectos*

Los primeros Sistemas de Certificación Profesional en Dirección de Proyectos aparecen en los años 80 del pasado siglo y desde entonces han tenido un amplio desarrollo tanto en número de entidades certificadoras, tipologías de certificados y personas certificadas. Antes de abordar los sistemas existentes y sus particularidades resulta procedente analizar las causas por las que los sistemas de certificación profesional han resultado particularmente exitosos en el ámbito de la dirección de proyectos.

En primer lugar, es importante destacar que se trata de una profesión relativamente joven. Diferentes autores (Stretton, 1993; Kwak, 2005; Seymour & Hussein, 2014) datan el nacimiento de la dirección y gestión de proyectos como una profesión nueva y diferenciada en la década de 1950. Ello hace que se trate de una profesión poco madura, en constante evolución, en la que aparecen nuevas

técnicas y modos de hacer que incluso llegan a convertirse en nuevos marcos de referencia, nuevos enfoques (aproximación iterativa frente secuencial, adaptativa frente procedural, etc.) y en la que existe una clara necesidad de armonización en vocabulario, estructuración de métodos y técnicas, y la definición de buenas prácticas generalmente aceptadas. Utilizando las palabras de Abbasi & Jaafari (2018) "la dirección de proyectos es un campo de actividad en el que no se producen desarrollos incrementales, sino que sufre cambios bruscos de paradigma, y es demasiado pronto para suponer que ha entrado en su fase de madurez".

Todo lo anterior se produce en paralelo a la formalización de los programas de formación en dirección de proyectos, que han evolucionado desde cursos cortos orientados a técnicas específicas y herramientas informáticas hacia programas de postgrado que compiten con los programas de maestría en dirección de empresas.

Por otro lado, el mercado, buscando profesionales transdisciplinares y sin una definición académica clara como en otras profesiones (medicina, derecho, ingeniería, arquitectura, etc.) recurría a las certificaciones como una alternativa a la carencia de titulaciones académicas específicas, lo que se está paliando en los últimos años con la proliferación de postgrados en dirección de proyectos, como se ha mencionado anteriormente.

Finalmente la juventud de la disciplina también ha conducido a que la dirección de proyectos quede fuera de los marcos tradicionales profesionales (reserva de dominio de actividad, colegios profesionales, normativas exigiendo titulaciones específicas, etc) y ante la falta de intervención de la administración en la regulación de la profesión consecuencia de los procesos de liberalización económica y la desregulación de profesiones vinculadas a la ingeniería y la economía (EU, 2006) son las empresas las que en la práctica tienen total libertad para la contratación de profesionales vinculados a la dirección de proyectos y recurren frecuentemente a la certificación profesional como una manera de establecer unos prerrequisitos de entrada a determinados puestos de trabajo, a la vez que segmentan o jerarquizan los niveles de responsabilidad de los profesionales que contratan, utilizando para ello organismos independientes, especializados en el ámbito y en muchos casos con reconocimiento internacional.

3.2. *Origen de los sistemas de certificación profesional en dirección de proyectos*

Tal como se ha mencionado, si situamos el origen de la moderna disciplina de la dirección de proyectos hacia 1950, con el desarrollo de las técnicas diagramáticas basadas en redes de actividades y su aplicación a la optimización de coste y plazo del proyecto (Kwak, 2005), en la década de 1960 y 1970 aparecen técnicas orientadas a la completitud del alcance, el control de costes y de la calidad.

En paralelo al desarrollo de estas incipientes técnicas, aumenta el sentimiento de pertenencia a una profesión y durante los años 70 y 80 crece el número de

asociaciones profesionales (Seymour & Hussein, 2014), así como el de afiliados a las mismas, y según éstas se consolidan, durante los 80 empiezan elaborar guías y manuales de formación, y ya en los 90 las asociaciones desarrollan planteamientos más conceptuales habitualmente denominados "cuerpos de conocimiento" (Crawford, 2004; Morris et al., 2006) o "estándares" (Crawford, 2013; Grau, 2013), tal como puede verse en la Tabla 2.

Entre las características necesarias para establecer un sistema de certificación profesional de carácter general se ha indicado que un requisito básico es la existencia de estándares robustos y bien definidos que reflejen los conocimientos, habilidades y competencias requeridas para el ejercicio exitoso de la profesión, ya que dichos estándares van a ser los elementos básicos para construir el sistema de evaluación, y su evolución es la que debe permitir la incorporación de las mejores prácticas disponibles y promover la actualización profesional.

Por tanto, es lógico suponer que los principales sistemas de certificación profesional en dirección de proyectos son los derivados de las asociaciones profesionales, y los estándares por ellas desarrollados, presentados en la Tabla 2.

Tabla 2: Creación de Asociaciones Profesionales y Elaboración de Guías y estándares. Fuentes: APM (2019); Axelos (2017); CoEPM² (2018); IPMA (2015); Motzel & Pannenbäcker, O. (1998); OGC (2009); PMI (2017, 2021); Capuz-Rizo & Ordieres-Meré (2022)

Creación de Asociaciones Profesionales e inicio de programas de certificación	Elaboración de Guías y estándares (Dirección de Proyectos)
• 1960… Reconocimiento del Project Management como actividad profesional	• 1987 Project Management Body of Knowledge (PM-BoK) First Ed. PMI
• 1965 Reunión constitutiva de IPMA en Viena (5 países)	• 1989 Prompt II → PRINCE (Projects in controlled environments) (OGC, UK)
• 1967 Registro legal de IPMA (Zurich)	• 1992 APM Body of Knowledge
• 1969 PMI fundado en Pensilvania por 5 personas. Primer seminario en Atlanta	• 1996 Project Management Body of Knowledge (PM-BoK) Second Ed. PMI
• 1972 APM UK	• 1996 Assessment Structure VZPM → Certificación en PM en Suiza
• 1976 The Project Managers' Forum (Australia) → 1989 The Australian Institute of Project Management (AIPM)	• 1996 PRINCE2 (OGC, UK)
• 1984 PMI lanza la certificación PMP	• 1998 PM-KANON GPM/PM-ZERT → Certificación en PM en Alemania

Creación de Asociaciones Profesionales e inicio de programas de certificación	Elaboración de Guías y estándares (Dirección de Proyectos)
• 1992 AEIPRO (Asociación Española de Ingeniería de Proyectos) • 1995/96 APM (UK) y otras MA pertenecientes a IPMA lanzan programas de certificación • 1998 Japan Project Management Forum → 2005 Project Management Association of Japan • 1999 EXIN inicia la Certificación con PRINCE2	• 1999 IPMA Competence Baseline v.1 • 2001 IPMA Competence Baseline v.2 • 2004 PM-BoK Thrid Ed. PMI, • 2006 IPMA Competence Baseline v.3 • 2008 PM-BoK Fourth Ed. PMI • 2009 PRINCE2: Refresh • 2012 ISO 21.500 • 2013 PM-BoK 5 Ed. PMI
• 2000 OCDP/AEIPRO → Certificación de PM en España • 2007 ISO crea el Comité de Programa PC/236 • 2011 ISO crea el Comité Técnico TC/258. • 2019 Se crea la PM2 Alliance para promover el uso de oPM2	• 2015 IPMA Competence Baseline v.4 • 2017 PM-BoK 6 Ed. PMI • 2018 PM2 Open Project Management Methodology (oPM2, EU) • 2020 ISO 21.502 • 2021 PM-BoK 7 Ed. PMI

3.3. *Principales sistemas de certificación profesional en dirección de proyectos*

Es imposible recopilar y enumerar todas las certificaciones profesionales relacionadas con la dirección de proyectos que se ofrecen por diferentes instituciones y empresas en los diferentes países del mundo, y en caso de intentar realizar dicha recopilación quedaría desactualizada en un breve lapso de tiempo.

Sin embargo, sí es factible identificar las certificaciones profesionales que están basadas en estándares maduros y que han sufrido una evolución y actualización a lo largo de las últimas tres décadas, gestionadas por instituciones estables y robustas, capaces de haber certificado centenares de miles de profesionales y con reconocimiento y acceso en la mayoría de los países desarrollados del planeta. Cumpliendo estos requisitos destacan las certificaciones en dirección de proyectos de AXELOS, PMI e IPMA. En la siguiente tabla se muestran las principales certificaciones que ofrecen estas tres organizaciones relacionadas con la dirección de proyectos.

Es posible que algún lector eche de menos algún tipo de certificación, pero en la tabla no se han incluido certificaciones para otros perfiles diferentes a la dirección de proyectos, por lo que no aparecen las certificaciones en áreas de gestión de tecnología de la información o de gestión del negocio ofrecidas tanto por Axelos

como por PMI, o las ofrecidas por IPMA para consultores y formadores (IPMA, 2018a); por no mencionar el crecimiento exponencial en tipos, niveles y variantes que están experimentando las certificaciones relacionadas con los métodos ágiles .

Tabla 3: Principales certificaciones profesionales en dirección de proyectos ofrecidas por AXELOS, Project Management Institute (PMI) e International Project Management Association (IPMA)

Organización	Tipo de Certificación en DP (Referencia al estándar aplicado)
AXELOS (UK)	• PRINCE2® Project Management Certifications (Axelos, 2017) • PRINCE2 Agile® Certifications (Axelos, 2015) • MSP®: Managing Successful Programmes (Axelos, 2020) • M_o_R®: The Management of Risk (OGC, 2010) • MoP®: principles, practices, and procedures for successful portfolio management (OGC, 2011) • Portfolio, Programme and Project Offices (P3O®) (Axelos, 2013) En todos los tipos de certificación existe un nivel introductorio (Foundation) y uno avanzado (Practicioner)
Project Magement Institute (PMI, USA)	• Profesional en Gestión de Tiempos (PMI-SP)® (PMI, 2019a) • Profesional en Gestión de Riesgos (PMI-RMP)® (PMI, 2019b) • Practicante Certificado en Enfoques Ágiles (PMI-ACP)® (PMI, 2018a) • Técnico Certificado en Dirección de Proyectos (CAPM)® (PMI, 2017a y 2021) • Profesional en Dirección de Proyectos (PMP)® (PMI, 2017a y 2021) • Profesional en Dirección de Programas (PgMP)® (PMI, 2017b) • Profesional en Dirección de Portafolios (PfMP)® (PMI, 2017c)

Organización	Tipo de Certificación en DP (Referencia al estándar aplicado)
International Project Management Association	• Dominio Proyectos. Nivel A: Director de Proyectos certificado, Nivel B: Gestor Senior de Proyectos certificado, Nivel C: Profesional de la Dirección de Proyectos certificado, y Nivel D: Técnico en Dirección de Proyectos certificado (IPMA, 2015a)
	• Dominio Programa. Nivel A: Director de Programas certificado y Nivel B: Gestor Senior de Programas certificado (IPMA, 2015b)
	• Dominio Portfolio/Cartera. Nivel A: Director de Carteras certificado y Nivel B: Gestor Senior de Cartera certificado (IPMA, 2015c)
	• Certificado en Liderazgo Ágil (IPMA, 2018b)

Para el lector interesado en tener una visión muy resumida de los estándares en los que se basan la mayoría de las anteriores certificaciones la editorial Van Haren publica periódicamente el libro "Global standards and Publications" en el que presenta sintéticamente los marcos de referencia y estándares que sirven como base para procedimientos de certificación. La edición de 2020 de esta guía (Agutter et al., 2020) presenta 4 tipos de estándares: Gestión de las tecnologías de la información, Arquitectura empresarial, Gestión del negocio y Dirección de proyectos; y entre estos últimos presenta: Agile (genérico), ICB 4 de IPMA, ISO 21500:2012 e ISO 31000:2018 de gestión de riesgos, MoP™, MoR®, MoV, MSP®, PRINCE2® y P3M3® y P3O® de Axelos, y PMBOK® Guide (PMI).

No es objeto de este capítulo hacer un análisis más exhaustivo de otros sistemas existentes. Sin embargo debe mencionarse que además de estas tres grandes organizaciones, existen asociaciones nacionales de dirección de proyectos con sistemas de certificación en dirección de proyectos consolidados y basados en estándares propios como la APM (Association for Project Management) del Reino Unido (APM, 2019), la AIPM (Australian Institute of Project Management) de Australia o la japonesa PMAJ (Project Management Association of Japan), o incluso la oPM2 creada por DIGIT de la Comisión Europea (2018), que no pueden confundirse con otras certificaciones creadas por asociaciones de ámbito local, empresas de formación, pequeños grupos de profesionales de un sector muy específico, o incluso personas carentes de ética que crean páginas web donde ofrecen certificaciones cuyos nombres son sospechosamente similares a las de los sistemas de mayor prestigio, que ofrecen como ventaja certificaciones con validez permanente, incapaces de cumplir con los requisitos de certificación de personas de la ISO 17.024, y que jamás podrían superar un proceso de acreditación, consiguiendo únicamente ge-

nerar confusión en el mercado y frenar el desarrollo de los sistemas de certificación profesional realmente valiosos.

Es posible encontrar en la bibliografía artículos publicados en artículos en revistas y congresos científicos en los que se analizan las certificaciones profesionales en dirección de proyectos existentes, comparando los requisitos de acceso y las exigencias o nivel de esfuerzo necesario para alcanzarlas. Remer (Remer et al., 2007) ofrece información sobre la organización que ofrece cada credencial, criterios de elegibilidad y requisitos de la certificación así como sobre la tipología de examen y coste del mismo, para las certificaciones PMP y CAPM del PMI, PMI Certified OPM3 Assesor y Consultant, Certified Construction Manager (CCM), Engineering Management Certification Fundamentals (EMCF) y Profesional (EMCP). Remer & Ross (2014) amplían el anterior estudio al resto de certificaciones parciales del PMI (Programa, Portfolio, Agile, Riesgos, Secuenciación), a los 4 niveles de IPMA y dos certificaciones de la American Society for Engineering Management (ASEM).

Cardoza (2011) compara cuatro sistemas de certificación profesional de dirección de proyectos (PMI, IPMA, PRINCE2 y P2M de la Project Management Association of Japan) analizando los niveles de certificación, los estándares y guías metodológicas en los que se apoyan, el enfoque de procesos, componentes, áreas y competencias que define, y el procedimiento necesario para alcanzar los diferentes niveles de certificación ofertados. Giammalvo (2023) realiza desde 2010 actualizaciones periódicas de un informe en el que compara más de 30 credenciales relacionadas más o menos directamente con la dirección de proyectos, con carácter exhaustivo y opiniones muy críticas en algún caso, afirmando que las promesas publicitadas por algunas de las certificaciones exceden en muchos casos al conocimiento y experiencia requeridos en el proceso de evaluación superado por los candidatos.

Finalmente indicar que desde la constitución por ISO del Comité de Programa PC 236 y la posterior creación en 2011 del Comité técnico TC 258, ISO ha lanzado y revisado numerosas normas relacionadas con la dirección de proyectos, programas y carteras, pero hasta la fecha ninguna de las normas se ha elaborado con la estructura y definición de requisitos de una norma certificable. (Capuz-Rizo & Ordieres-Meré, 2022).

3.4. *Beneficios específicos de la certificación de directores de proyectos.*

Estos son algunos beneficios específicos de la certificación profesional en dirección de proyectos

• Mejora de las habilidades y el conocimiento: los programas de certificación en dirección de proyectos profesionales brindan un enfoque estructurado e integral para desarrollar habilidades y conocimientos en la dirección de

proyectos. Esto puede ayudar a las personas a mantenerse actualizadas en los marcos de referencia, metodologías y buenas prácticas más novedosas y contrastadas.

- Demostrar competencia y credibilidad. La certificación profesional en dirección de proyectos debe demostrar el conocimiento, las habilidades y la experiencia de una persona en dirección de proyectos, con el fin de generar credibilidad con los empleadores, clientes y colegas.
- Mejorar las oportunidades profesionales. La dirección de proyectos es un campo en rápido crecimiento y la obtención de una certificación profesional puede demostrar su compromiso con el aprendizaje continuo y el desarrollo profesional, lo que es valorado por muchos empleadores, que pueden requerirla para ciertos roles o promociones, llegando a ser una ventaja competitiva en las solicitudes de empleo y las negociaciones salariales.
- Mejorar el éxito del proyecto y reducir el riesgo, promoviendo que los directores de proyecto tengan el conocimiento y las habilidades necesarios para planificar, ejecutar y cerrar proyectos de manera eficaz, a la vez que sean capaces de identificar y mitigar los riesgos, lo que lleva a resultados más exitosos.
- Mejorar el desempeño organizacional: las empresas pueden beneficiarse de la certificación profesional en dirección de proyectos garantizando que sus directores de proyecto sean profesionales eficaces y eficientes, así como ayudando a estandarizar las prácticas y los procesos de dirección de proyectos en toda una organización.
- Avance de la profesión: la certificación profesional en dirección de proyectos colabora a este objetivo estableciendo estándares bien definidos y estructurados que promuevan la adquisición de conocimiento, y el desarrollo de habilidades y experiencia, de manera que evolucione y perfeccione la práctica de la disciplina y aumente la reputación y prestigio de la profesión.
- Creación de redes y comunidad: las asociaciones e instituciones que respaldan o promueven los programas de certificación profesional frecuentemente facilitan el acceso a oportunidades de redes y una comunidad de compañeros que comparten intereses y objetivos similares. Esto puede proporcionar un valioso apoyo, asesoramiento y tutoría para las personas que buscan avanzar en sus carreras en la dirección de proyectos.

3.5. *Posibilidades de mejora de los sistemas de certificación profesional en dirección de proyectos*

Si bien los sistemas de certificación profesional en dirección de proyectos tienen muchos beneficios, lógicamente también existen algunas debilidades y áreas de mejora. Seguidamente se plantean algunas áreas potenciales que podrían abordarse para mejorar dichos sistemas:

- Mayor enfoque en la aplicación práctica: muchos programas de certificación profesional en dirección de proyectos ponen un gran énfasis en el conocimiento teórico, pero es posible que no evalúen con suficiente rigor su aplicación práctica. Es posible que personas sin experiencia real superen un examen con mayor facilidad que personas que provienen de la experiencia laboral, a la vez que no se requiera la demostración de que lo aprendido se haya aplicado a situaciones del mundo real. La incorporación de más oportunidades de aprendizaje práctico, como estudios de casos y simulaciones, podría ayudar a las personas a comprender mejor cómo aplicar los conceptos y técnicas de dirección de proyectos en la práctica.
- Flexibilidad y personalización: los programas de certificación profesional en dirección de proyectos a menudo tienen requisitos rígidos y es posible que no permitan la personalización en función de las necesidades o la experiencia específicas de un individuo.
- Actualizar el contenido y seguir el ritmo de los cambios de la industria: el campo de la dirección de proyectos está en constante evolución, y los programas de certificación profesional deben seguir el ritmo de estos cambios para seguir siendo relevantes y efectivos. Las actualizaciones periódicas del contenido de la certificación, así como las oportunidades de desarrollo profesional continuo, podrían ayudar a garantizar que las personas se mantengan al día con las últimas tendencias y mejores prácticas de la industria.

4. Contribución de la certificación profesional al éxito en la dirección de proyectos

4.1. *Medición del impacto de los sistemas de certificación profesional*

Una de las principales preguntas relativas a la certificación profesional en general, y en concreto en el ámbito de la dirección de proyectos, es el valor aportado, hasta qué punto es rentable el esfuerzo de tiempo y dinero realizado por las personas individualmente o por las empresas que las contratan y apoyan para conseguir una certificación profesional.

Demostrar el impacto de la certificación profesional en la madurez individual y organizacional puede ser un desafío, ya que implica medir factores intangibles como el conocimiento, las habilidades y las competencias. Sin embargo, hay varias formas de evaluar el impacto de la certificación profesional:

- Evaluaciones de desempeño: Las organizaciones pueden evaluar el desempeño de los directores de proyecto que han obtenido la certificación profesional y compararlo con aquellos que no la tienen. Esto puede ayudar a identificar diferencias en las tasas de éxito del proyecto, satisfacción de las partes interesadas y rendimiento general.

- Encuestas y comentarios: se pueden realizar encuestas para recopilar comentarios de los directores de proyectos, miembros del equipo y otras partes interesadas sobre el impacto de la certificación profesional en la madurez de la dirección de proyectos. Esto puede proporcionar información valiosa sobre el valor percibido de la certificación.
- Casos de estudio y mejores prácticas: las organizaciones pueden documentar y compartir casos de estudio y mejores prácticas de directores de proyecto que hayan obtenido una certificación profesional.
- Investigación y evaluación comparativa: se pueden realizar investigaciones y estudios de evaluación comparativa de la industria para comparar el desempeño de las organizaciones que invierten en certificación profesional con aquellas que no lo hacen.

4.2. *Revisión de la literatura científica*

Se ha realizado una revisión bibliográfica de los trabajos de investigación publicados durante los últimos veinte años en revistas científicas, en los que se analiza la relación entre éxito en la dirección de proyectos y certificación profesional, intentando estimar el valor generado por la certificación y responder a la pregunta ¿hasta qué punto puede mejorar el éxito del proyecto el hecho de que su dirección sea realizada por directores de proyectos poseedores de una certificación profesional?

En la mayoría de estos artículos se concluye que no es posible demostrar una correlación directa entre el nivel o porcentaje de éxito en los proyectos dirigidos y la posesión de un certificado como director de proyecto. En primera lectura este resultado parece paradójico y contrario al sentido común, ya que la formación y esfuerzo requeridos para obtener la certificación profesional debería ofrecer resultados claramente positivos, pero el problema requiere un análisis más profundo.

La primera cuestión que surge, mucho más debatida en la literatura científica, es cómo valorar el éxito en la dirección de un proyecto, cómo medirlo, quién lo puede juzgar, y si la evaluación debe ser cuantitativa o también cualitativa (Ika & Pinto, 2022). Es más, es posible dar un paso previo e intentar cuantificar el valor ofrecido por la aplicación de las metodologías y técnicas de la disciplina de la dirección de proyectos y encontrar numerosas dificultades para ello (Thomas & Mullaly, 2007).

Mahaney & Greer (2004) estudiaron los beneficios de la certificación PMP® para las empresas que realizan proyectos de sistemas de información, concluyendo que, si bien era posible encontrar mejoras en la satisfacción del cliente, en la comunicación y la colaboración, e incluso una mayor satisfacción laboral y motivación entre los directores de proyectos certificados, los beneficios de la certificación PMP para las organizaciones no son fácilmente cuantificables.

Müller y Turner (2007) analizaron la influencia de los directores de proyecto en los criterios de éxito del proyecto y el éxito del proyecto por tipo de proyecto,

encuestando para ello a 959 directores de proyectos. Encontraron que la importancia otorgada a los criterios de éxito del proyecto y las tasas de éxito del proyecto difieren según la industria, la complejidad del proyecto y la edad y nacionalidad del director del proyecto. No pudo demostrarse que existiera una diferencia sustancial entre los resultados alcanzados por directores de proyecto con o sin certificación. Sin embargo, en proyectos de alta exigencia los directores de proyectos certificados obtuvieron puntajes significativamente más altos en términos de éxito del proyecto que los no certificados, por lo que concluyen que la certificación profesional en dirección de proyectos resulta más útil para mejorar el desempeño de los directores de alto rendimiento, pero no necesariamente para aquellos con menor rendimiento.

Starkweather & Stevenson, (2011) estudiaron la certificación en Project Management Professional (PMP®) y su valoración por parte de ejecutivos de tecnologías de la información (TI) como un requisito fundamental para la dirección de proyectos y como un factor relacionado con el éxito del proyecto. En el análisis no se encontró una diferencia estadísticamente significativa en las tasas de éxito del proyecto entre los directores de proyecto certificados como PMP y los no certificados, sugiriendo el estudio que esta certificación no incide o garantiza habilidades blandas como la comunicación y el liderazgo, críticas para el éxito del proyecto.

Catanio et al. (2013), también en un estudio en la industria de las TI, recopilaron datos de directores de proyectos en ejercicio, con y sin certificación, y con varios años de experiencia, obteniendo que no había una diferencia estadística significativa en la gestión de plazo y coste del proyecto entre los directores de Proyecto, certificados y no certificados, con el mismo nivel de experiencia.

Al igual que las dos referencias anteriores, en otro estudio (Joseph & Marnewick, 2018) sobre el impacto de la certificación de dirección de proyectos en el éxito de los proyectos de TI, no se encontró que la certificación tuviera un impacto significativo en el desempeño del proyecto y sugiere que las certificaciones deben adoptar nuevos enfoques para garantizar un equilibrio entre las habilidades duras y blandas necesarias para la gestión eficaz de proyectos de TI, además de dudar si el enfoque de dirección de proyectos generalista para cualquier tipología de proyecto es aplicable a los proyectos de TI, demandando una especialización adaptada a dicha industria.

En un trabajo más reciente, Aslam & Bilal (2021) siguen sin dar una respuesta categórica. En su investigación, basada en la teoría de los factores críticos de éxito, examinaron el impacto de la certificación en dirección de proyectos en el rendimiento del proyecto, incluyendo como variables intervinientes la profesionalidad y el capital psicológico, concluyendo que la certificación en dirección de proyectos puede tener un impacto positivo en el desempeño del proyecto, pero es muy difícil separar los beneficios obtenidos de otros factores correlacionados, como el nivel de profesionalismo.

En síntesis, en la mayoría de trabajos se justifica la paradoja mencionada con críticas de fondo a la certificación profesional en dirección de proyectos relativas

a la aplicabilidad general de certificaciones con validez para cualquier tipo de proyecto ("all fits in one size"), o a que pueda afirmarse que un profesional apto en un determinado contexto mantenga su nivel de desempeño al cambiar su ámbito de actividad, organizativo o incluso geográfico y/o cultural. También se discute la idoneidad de las certificaciones basadas en procedimientos de difícil encaje en algunos sectores, como los modelos procedurales en el campo de las TI, tal como prueba el hecho de la cada vez mayor popularidad de las metodologías ágiles de dirección de proyectos, o la aparición de enfoques metodológicos híbridos más flexibles que los modelos clásicos.

Otro aspecto importante a considerar es cómo ha evolucionado en el tiempo la motivación para la certificación profesional en dirección de proyectos. Según un estudio que comparaba la motivación para certificarse y los beneficios percibidos tras obtenerla, con datos de 2004 y 2014 (Blomquist et al., 2018), los candidatos que buscaban obtener la certificación en dirección de proyectos en 2004 demostraban niveles más altos de motivación que los candidatos de 2014, pero recibieron menos beneficios que aquellos que se certificaron en 2014. En 2004, los certificados estaban motivados principalmente por factores internos, asociados con el aumento de conocimiento y la mejora en el desempeño profesional, y después del proceso de certificación, respondían que las principales recompensas obtenidas eran de tipo intrínseco, como una mayor satisfacción personal o autorrealización, pero opinaban que no recibían un adecuado reconocimiento por sus pares o sus clientes. Sin embargo, en 2014, la autorrealización y deseo de crecimiento profesional sigue siendo la principal motivación para certificarse, pero los directores de proyectos perciben una mayor valoración externa de la certificación.

En la revisión bibliográfica también es posible encontrar otro tipo de resultados ligados con el efecto de la certificación sobre el desarrollo de la profesión. Vlahov et al. (2016) estudia los profesionales certificados en dirección de proyectos según el modelo IPMA (ICB 3.0), en cuatro países del ámbito cultural y geográfico mediterráneo (Italia, España, Portugal y Croacia) durante el periodo 2007-2014, correlacionando diferentes variables como nivel de certificaciones obtenidas, sectores de actividad de los directores certificados, tasa de directores de proyectos certificados respecto la población del país y al nivel de producto interior bruto per cápita, etc. Paneque et al. (2021) estudia las evaluaciones realizadas con el modelo IPMA (ICB 3.0) en España durante el periodo 2014 a 2019, para los niveles C, B y A en los que se exige la presentación de un informe STAR (Situación-Tarea-Actividad-Resultado) y una entrevista con dos evaluadores, para determinar hasta qué punto el principio de sostenibilidad se encuentra presente en los proyectos sometidos a evaluación en los informes STAR, y hasta qué punto el procedimiento de evaluación de IPMA permite capturar y explicitar la relación entre elementos de competencia y sostenibilidad.

4.3. *Análisis de la revisión bibliográfica e interpretación personal*

El apartado anterior no ofrece una respuesta satisfactoria a la pregunta realizada, y casi genera más preguntas que respuestas. Para intentar reducir la incertidumbre únicamente puedo aportar una visión personal y, por tanto, subjetiva. Como la comparación entre el valor, exigencia, rigor y utilidad de las diferentes certificaciones existentes en el mercado es un tema en constante discusión, en el que cada persona tiene su visión, opinión y preferencias, considero conveniente indicar mi trayectoria. Mi perspectiva es fruto de mi experiencia como director de proyectos de consultoría en logística y de investigación competitiva, como director de proyectos certificado (IPMA Nivel B), como evaluador de candidatos a la certificación (IPMA niveles B, C y D), como profesor de dirección de proyectos y como estudioso de los diferentes marcos de referencia, metodologías, modelos y estándares en dirección de proyectos.

Desde mi punto de vista, todos los sistemas de certificación profesional de dirección de proyectos pueden funcionar como un pequeño escalón o como una magnífica escalera en la mejora del desempeño profesional, dependiendo de la persona que se aproxime a los mismos.

Si la persona se acerca pensando que la certificación es el fin del camino, que una vez alcanzada se ha adquirido una licencia "comodín" válida para cualquier proyecto, que ya tiene tanta competencia profesional como cualquier otro director certificado, y por supuesto más que cualquier otro director de proyecto no certificado, que la actualización profesional es tan innecesaria como la renovación de la certificación, que la certificación es el objetivo y una vez alcanzado ya se ha tocado techo; en este caso no es posible esperar que dicha persona llegue a ser un excelente director de proyecto.

Si, por otro lado, encontramos un profesional con una experiencia básica, con una destreza creciente, bien considerado en las tareas que desempeña, que sin exigencia por parte de su empresa o sus clientes y teniendo como motivación básica el crecimiento profesional y la responsabilidad de lograr ser más eficiente y ofrecer mejores resultados a sus compañeros, clientes, empresa y la Sociedad en general, actuando de manera responsable y honesta, y dedica parte de su tiempo personal a seguir estudiando, preparar unas pruebas y exámenes, asumiendo un desembolso económico, con el riesgo de no superar ese proceso de certificación, así como el tiempo y dinero invertido. En este segundo caso me atrevo a pronosticar que un sistema de certificación profesional puede ser la herramienta fundamental para el desarrollo de una exitosa carrera profesional en dirección de proyectos.

Lógicamente este punto de vista personal hace que determinadas características de los sistemas de certificación en dirección de proyectos me parezcan más útiles que otras. Por ejemplo, me parece más útil una certificación dirigida a personas con una experiencia básica que las certificaciones que no la requieren. Creo que es mejor un sistema que evalúe por tercera parte la experiencia profesional, que el que confía en

una autodeclaración. Opino que las destrezas y competencias de comportamiento y adaptación al contexto son tan importantes como el conocimiento de habilidades técnicas y uso de métodos y herramientas. Pienso que es mejor un sistema de certificación multinivel, que acompañe la evolución en tamaño y complejidad de los proyectos dirigidos a lo largo del tiempo, que un sistema de entrada única ("pasa o no pasa"), y que no jerarquice los directores de proyectos certificados ni estimule seguir avanzando en la carrera profesional.

Y considero que tan importante como el certificado profesional alcanzado, es que la persona reciba un informe personalizado elaborado por los evaluadores al final del proceso de certificación, usualmente denominado plan de brechas. Esta retroalimentación debe mostrar al candidato tanto las fortalezas como las debilidades identificadas, evidenciando al candidato aspectos de mejora que otras personas difícilmente detectarán y que en caso de hacerlo evitarán comentar. El plan de brechas debe de servir como guía para empezar a trabajar en el próximo paso en la carrera profesional, e incluso en el siguiente nivel de certificación.

5. Contribución de la Certificación profesional en dirección de proyectos a la proyectificación de la sociedad

5.1. *Dirección de proyectos y Proyectificación de la Sociedad*

Entendemos por proyectificación de la sociedad la creciente tendencia a organizar y gestionar las actividades sociales, económicas y políticas como proyectos, es decir, el hecho de que cada vez sea mayor el número de actividades que se planifican, ejecutan y monitorizan de manera estructurada y sistemática, utilizando técnicas y herramientas de dirección de proyectos.

Como se ha mencionado en el apartado 3.2, es a mediados del siglo XX, cuando la dirección de proyectos comenzó a emerger como una disciplina distinta en el contexto de proyectos de ingeniería y construcción de grandes infraestructuras y equipamientos. A medida que estos proyectos se volvieron más complejos y requirieron la coordinación de múltiples partes interesadas, se desarrollaron técnicas de dirección de proyectos más avanzadas para garantizar que se completaran en plazo, dentro del presupuesto y con el alcance y requisitos de calidad contratados. Con el tiempo, la aplicación de técnicas de dirección de proyectos se ha expandido más allá de los proyectos de ingeniería y construcción para incluir otros tipos de proyectos, como el desarrollo de software, campañas de marketing e iniciativas de cambio organizacional. En los últimos años, la importancia de los proyectos en la sociedad se ha vuelto más generalizada, y muchos aspectos de la vida social, económica y política se organizan y gestionan como proyectos (Schoper et al., 2018).

Hay varios factores que han contribuido a la proyectificación de la sociedad, incluyendo la globalización, los avances tecnológicos y la creciente complejidad de los sistemas sociales, económicos y políticos. En respuesta a estos factores, la

dirección de proyectos ha evolucionado y se ha diversificado, con el desarrollo de nuevas metodologías y enfoques para abordar los desafíos únicos de diferentes tipos de proyectos.

5.2. *Certificación profesional en dirección de proyectos y crecimiento de la madurez en dirección de proyectos*

Cuando la profesión y la disciplina han cumplido sus primeros cuarenta años, pese a disponer de numerosos estándares, metodologías y herramientas informáticas, las tasas de éxito en la ejecución de proyectos no son satisfactorias, tal como demuestran las encuestas y estudios año tras año (PWC, 2012; PMI, 2018b; Wellingtone, 2021).

¿Por qué sabiendo qué actividades, procesos, técnicas deben realizarse para gestionar un proyecto, los porcentajes de éxito siguen siendo bajos? ¿Por qué unos equipos de proyectos sufren repetidamente desviaciones en plazo y coste, o son incapaces de implementar los productos del proyecto (entregables) satisfaciendo todos los requerimientos contratados, mientras otros equipos obtienen sistemáticamente mejores resultados? ¿Es posible medir la eficiencia con la que las organizaciones desarrollan la dirección y gestión de proyectos?

Como respuesta a estos interrogantes surge el concepto de madurez organizacional de la dirección de proyectos, como una variable que evalúa la probabilidad de que una determinada organización gestione exitosamente la ejecución de un proyecto.

Al someterse a la certificación, los directores de proyecto deben demostrar un cierto nivel de conocimiento, habilidades y experiencia en la dirección de proyectos. Esto puede ayudar a los directores de proyectos a desarrollar una comprensión más profunda de la disciplina y mejorar su capacidad para administrar proyectos de manera efectiva. Además, un sistema de certificación profesional también puede contribuir a la madurez de la organización en su conjunto al ayudar a establecer prácticas y procesos de gestión de proyectos estandarizados. La certificación puede ayudar a garantizar que los directores de proyecto sigan las mejores prácticas y se adhieran a los estándares de la industria, lo que puede conducir a mejores resultados del proyecto y al desempeño general de la organización.

5.3. *Certificación profesional en Dirección de proyectos y proyectificación de la Sociedad*

Es posible plantear la existencia de una correlación entre los sistemas de certificación profesional y la proyectificación de la sociedad considerando que ambos fenómenos son impulsados por un creciente reconocimiento de la importancia de una dirección eficaz de proyectos.

Los sistemas de certificación brindan una manera de demostrar y validar la competencia de un individuo en la dirección de proyectos, lo que se vuelve cada vez más importante a medida que los proyectos se vuelven más complejos y requieren

un mayor nivel de experiencia. Al obtener una certificación profesional, las personas pueden mostrar sus conocimientos y habilidades a posibles empleadores y clientes, y distinguirse de otros que pueden no tener el mismo nivel de calificaciones.

Al mismo tiempo, la proyectificación de la sociedad está creando una mayor demanda de personas con experiencia en dirección de proyectos, ya que cada vez más actividades se organizan y gestionan como proyectos. Esta demanda está impulsando el desarrollo de los programas de certificación para garantizar que haya una oferta adecuada de profesionales cualificados que puedan satisfacer las necesidades de la creciente industria de dirección de proyectos (Wagner et al., 2021).

De esta manera, los sistemas de certificación y la proyectificación de la sociedad están interconectados, actuando los primeros como un elemento de apoyo de la segunda, a la vez que esta actúa como estímulo de los primeros. En esencia, la proyectificación de la sociedad otorga un reconocimiento creciente de la importancia de los enfoques estructurados y sistemáticos para gestionar actividades complejas, que a menudo se organizan como proyectos, asumiendo las limitaciones de los enfoques tradicionales para la gestión de actividades, que pueden ser menos eficaces para hacer frente a la complejidad y la incertidumbre inherentes a muchos proyectos modernos.

Los sistemas de certificación profesional, a su vez, reflejan un reconocimiento similar de la importancia de los enfoques estructurados y sistemáticos para desarrollar y validar la experiencia en la dirección de proyectos, proporcionando un marco estandarizado para evaluar y certificar las habilidades y el conocimiento de los profesionales de la dirección de proyectos, y por tanto contribuyendo a garantizar que haya un nivel creciente de competencia en los diferentes contextos, lo que a su vez respalda la tendencia más amplia hacia la proyectificación de la sociedad.

Desde esta perspectiva, los sistemas de certificación profesional y la proyectificación de la sociedad pueden considerarse como dos fenómenos interconectados, vinculados por los cambios sucedidos en la forma en que organizamos y gestionamos las actividades sociales, económicas y políticas.

5.4. *Perspectivas de futuro en relación a la certificación profesional en dirección de proyectos y la proyectificación de la Sociedad*

Una posible tendencia es que la proyectificación de la sociedad siga acelerándose en los próximos años, a medida que las empresas y organizaciones reconozcan cada vez más los beneficios de los enfoques estructurados y sistemáticos para gestionar actividades complejas. Esta tendencia puede verse impulsada aún más por los avances tecnológicos, que están permitiendo emprender nuevos tipos de proyectos que antes no eran posibles.

A medida que la proyectificación de la sociedad continúa evolucionando, es probable que los sistemas de certificación profesional existentes en la dirección de

proyectos también deban adaptarse y evolucionar para mantenerse al día con las demandas y expectativas cambiantes. Esto puede implicar el desarrollo de nuevos programas de certificación que se adapten a industrias o tipos de proyectos específicos, así como la integración de nuevas tecnologías y metodologías en los programas de certificación existentes.

Otra tendencia potencial es que el papel de los directores de proyecto puede cambiar en respuesta a las demandas cambiantes y los desarrollos tecnológicos. Por ejemplo, el uso creciente de la inteligencia artificial y el aprendizaje automático puede conducir a un mayor énfasis en el análisis de datos y el modelado predictivo, lo que requiere que los directores de proyectos desarrollen nuevas habilidades y competencias en estas áreas. De manera similar, la creciente importancia de la sostenibilidad y la responsabilidad social puede requerir que los directores de proyecto incorporen nuevos marcos éticos y modelos de toma de decisiones en su trabajo.

En respuesta a estos cambios, es posible que los sistemas de certificación profesional deban evolucionar para incluir nuevas competencias y áreas de conocimiento, así como nuevas metodologías de evaluación que puedan medir con precisión estas habilidades y competencias. Esto puede implicar el uso de nuevas tecnologías, como simulaciones de realidad virtual u otros métodos de evaluación avanzados.

En síntesis, la evolución futura de los sistemas de certificación profesional en dirección de proyectos probablemente estará determinada por una interacción compleja de desarrollos tecnológicos, tendencias sociales y culturales y demandas y expectativas cambiantes de las empresas y organizaciones. Si bien es imposible predecir el futuro, parece claro que la proyectificación de la sociedad será un factor clave de cambio en el campo de la dirección de proyectos, y que los sistemas de certificación profesional deberán adaptarse y evolucionar para mantener en el futuro su utilidad y relevancia.

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