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Stakeholder management in projects: A brief review

Gestão das partes interessadas em projetos: uma breve revisão

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A B S T R A C T

This article aims to conduct a systematic literature review on the management studies of stakeholders in project management, in the period between the years 2020 and 2021, in the field of articles deposited in the database of Journals of the Coordination for the Improvement of Higher Education Personnel (*Coordenação de Aperfeiçoamento de Pessoal de Nível Superior* - Capes). To this end, the protocol Main Items for Reporting Systematic Reviews and Meta-analyses (*Principais Itens para Relatar Revisões Sistemáticas e Meta-análises* - Prisma) was used for the selection of articles. The results indicate that since the release of the version a first look at the PMBOK® 7th edition guide, there are no articles in Portuguese that address stakeholder management from the perspective of the principles presents in this version. Limitations of the study are considered the fact that the database of Capes journals presents limitations regarding the use of search engines. For future studies it´s indicated that the theme be approached a systematic literature review using other databases.

R E S U M O

Este artigo tem o objetivo de realizar uma revisão sistemática de literatura a respeito dos estudos de gestão das partes interessadas (*stakeholders*) em gestão projetos, no período compreendido entre os anos 2020 e 2021, no campo dos artigos depositados na base de Periódicos da Coordenação de Aperfeiçoamento de Pessoal de Nível Superior (Capes). Para tal, foi utilizado o protocolo Principais Itens para Relatar Revisões sistemáticas e Meta-análises (Prisma), para a seleção dos artigos. Os resultados indicam que desde o lançamento da versão um primeiro olhar sobre o guia PMBOK® 7ª edição, não há artigos em português que aborde o gerenciamento dos stakeholders na perspectiva dos princípios presentes nesta versão. Consideram-se limitações do estudo, o fato de a base de periódicos da Capes apresentar limitações quanto ao uso das ferramentas para buscas. Para estudos futuros é indicado que a temática seja abordada revisão sistemática de literatura com uso de outras bases de dados.

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Introduction

The complex context in which organizations are inserted requires rapid response, either as a way to improve organizational competitiveness criteria or even so that the functional areas (Marketing, Production, Planning, Logistics) can achieve good levels of effectiveness and efficiency in processes and projects that aim to meet the varied demands and interests of those involved in the various stages of business such as sponsors, employees, suppliers, community and managers.

With regard to project management, they can be called stakeholders (CICMIL, 1997). Thus, it´s convenient to conceptualize projects and stakeholders. According to the Project Management Institute (PMI, 2017), project is a temporary effort undertaken to create a unique product, service or result. This characteristic of temporality indicates that the project has a well-defined beginning, middle and end.

For Freeman (2004), stakeholder is defined as individuals, groups or organizations that can affect, be affected by, or perceive themselves affected by a decision, activity or result of a portfolio, program or project. Stakeholders also directly or indirectly influence a project, its performance or outcome in a positive or negative way. That is, they are a group of people who play an indispensable role in the success of the business.

By considering the various relationships, interests and possible conflicts that occur between the stakeholders in the project, it´s evident the importance of this principle and how it´s managed and applied in the conduct of project activities. It´s important to understand that it will not be the totality of the problems that will be solved with good stakeholder management, but that they can be mitigated with mapping and action aimed at reducing the factors that affect the stakeholders of the project (DE MASCENA et al., 2021). This mapping goes through the understanding of the categories of stakeholders.

Dos Santos et al. (2019) state that the term stakeholders was introduced into scientific debates and at the center of organizational strategies by Edward Freeman (1984) through the seminal work entitled “Strategic Management: a Stakeholder Approach”. For Freeman (1984), there are several categories such as suppliers, customers, community, government, managers, et cetera.

Studies that contemplate the stakeholders have been elaborated since the mid-1960s. It´s believed that the first approach to stakeholder was identified in an internal memo from the Stanford Research Institute (now SRI International, Inc.) in 1963, which referred to stakeholder as “those groups without the support of which the organization would cease to exist” (FREEMAN, 2010).

In the context of project management, the term was presented and disseminated in the work of Freeman (1984), however, only from the 2000s, with the inclusion of the area of knowledge "stakeholders" in the 5th edition of the "Project Management Body of Knowledge" (PMBOK® Guide, 2013) the debates about the stakeholders in project management were increasing in the academic environment. This growth is probably related to this inclusion (DOS SANTOS et al., 2019).

Although this growth to discuss the term stakeholders has persisted, there are still issues and issues that have not been addressed in depth in research involving the topic of stakeholders (DOS SANTOS AMARAL, 2017). Thus, some studies seek to understand the concepts about the "Stakeholder Theory", compare the concepts found with agency theory or present different approaches to stakeholder theory (CUNHA DE MASCENA, 2020).

It´s vital to point out that stakeholder management in project management is configured as a continuous effort to develop relationships and interactions with and between stakeholders in order to achieve the objectives of the project (FERREIRA FRENCO, et al. 2016). For the same author, the role of the project manager as a responsible focus to manage these relationships, which sometimes present themselves as antagonistic, is paramount.

Understanding that there is no area of knowledge with greater relevance than another is important for the parties involved in project management. However, all have been developed to provide as much return as possible in relation to the interests of the parties involved in project management, and its structure and objective are designed based on the profile of the people who relate to it, work with it, and achieve its final object.

Thus, the present study is guided by the following question: How has the management of stakeholders in projects been studied by the scientific community? As a way to answer this question, the objective of this study is to conduct a systematic literature review on stakeholder management studies in recent years, specifically in the years 2020 and 2021, in the field of articles deposited in the repository of the Journal Portal of the Coordination for the Improvement of Higher Education Personnel (*Portal de Periódicos da Coordenação de Aperfeiçoamento de Pessoal de Nível Superior* - Capes).

The relevance of this study is evidenced by what the PMI (2021) recommends. Stakeholders in project management can come and go throughout the project life cycle. In addition, the interest, influence or impact of a stakeholder can change over time and greatly affect the scope, value delivery, quality, costs, project teams, plans, level of engagement, among others, directly reflecting on the way stakeholder management is studied and analyzed (GOMES, et al., 2017). It also becomes relevant because it enables academia and society to state the art about stakeholder management in the field of project management.

Theoretical Reference

In this section will be presented aspects that matter in the management of stakeholders in the context of projects and that establish an important contribution to the theoretical support of the theme addressed.

Project Management

Over the years, project management has been seen as a profession aimed at meeting the demands of markets oriented solely to projects and that the results that were related to profit should be the responsibilities of the project manager. Currently, the participation of the parties involved in project management is evidenced as a critical success factor, and the context in which the organization is inserted can impact the performance of the parties (FERREIRA FRANCO et al., 2016).

This context is full of information that can be used to establish superior performance in relation to competitors, as well as paths and decisions to be made that enable the organization's competitive advantage over others (SAN CRISTÓBAL, 2018).

According to San Cristóbal (2018), the importance of complexity to the project management process is widely recognized for several reasons: (i) it influences project planning, coordination, and control; (ii) makes it difficult to clearly identify the goals and objectives of large projects; (iii) may affect the selection of an appropriate form of project organization and the experience requirements of management staff; (iv) may be used as a criterion in the selection of appropriate project management; and (v) may affect different project outcomes (time, cost, quality, safety, stakeholders et cetera).

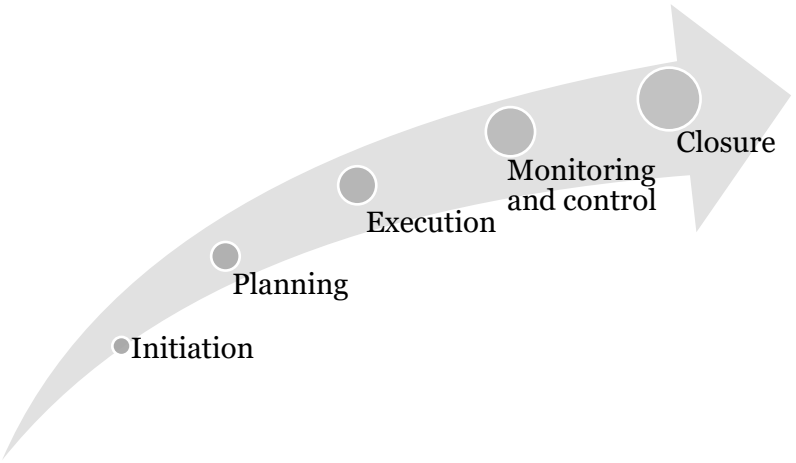
It´s necessary that the parties involved in this context are as assertive as possible in order to enable a dynamic work environment, strong learning and mitigation of errors that may arise in the project environment. The Project Management Institute (PMI, 2017) defines project as “a temporary effort undertaken to create a unique product, service, or outcome”. This characteristic of temporality indicates that the project has a well-determined beginning, middle and end. The end of the project is reached when the product, service or unique result is delivered either because it´s no longer possible to achieve the objectives or because its need ceases to exist.

Congregating, Kersner (2009) states that it should be composed of methods that restructure the administration and transform management techniques in order to better control and use the available resources throughout the life cycle of the project. Thus, it´s necessary that the project management occurs in the perspective of the application of

knowledge skills, tools and techniques to the project activities, which are indispensable to achieve the objectives.

The (PMBOK®, 2017) characterizes the life cycle of projects in five large groups of processes that can be visualized in the figure below.

Figure 1. Process group.



Source: The author, adapted from the PMBOK® Guide (2017).

In the field of organizational projects, it´s evident that good management enables better control due to the various actors involved, from the beginning to the end, a fact that is elementary for the sustainability and growth of a given business (ZALESKI, 2021). In many cases, good project management needs to establish relationships with all parties involved in order to ensure the proper development of the project (FERREIRA FRANCO, 2016).

Throughout its life cycle, project management can become largely complex as the complexity of the internal and external environment of the organization increases, demanding effectiveness and efficiency in project management.

Effective and efficient project management is practiced from the proper use of the 10 areas of knowledge, where each one will act in a complete way the knowledge referring to a specific field or area. PMBOK® (2017) establishes ten areas of knowledge in project management that can be viewed in table 1.

Table 1. Areas of knowledge of project management.

Projects	Integration
	Scope
	Schedule
	Cost
	Quality
	Resources
	Communication
	Risks
	Acquisitions
	Stakeholders

Source: The author, adapted from the PMBOK® Guide (2017).

It´s verified that among the areas highlighted in table 1, the interested parties can influence the others and consequently can positively or negatively affect the management of the projects (GOMES, 2017). In this way, the project manager and stakeholders are influenced by aspects such as different life experiences, culture, composition of the project team, management style of the manager that can explain the levels of impact and influence, as well as other conditions that make the subjects constant provocateurs of change (ALMEIDA, 2019).

For Junqueira (2020), there are success factors in projects and these "are related to characteristics, conditions or variables that can have a significant impact on the success of a project when sustained, maintained and managed appropriately". Pinto and Svele (1987); Junqueira (2020) state that success factors are the mission of the project; support from senior management; project schedule; customer consultation; staff; technical tasks; customer acceptance; monitoring and feedback; problem solving; and communication. It´s seen that the success factors are, in majority, aspects that concern the stakeholders and logically, their good management enables success in achieving the objectives of the projects.

It´s vital that stakeholder management is addressed in the scope management plan. In this process, it´s imperative to manage the individual expectations and objectives of stakeholders, since in general, the objectives are conflicting and different (DIAS et al. 2016).

It´s noteworthy that the management process of stakeholders, interact throughout the project life cycle (CICMIL, 1997), that is, "the organization of the project can be influenced

by the stakeholders directly or indirectly through the project team itself, government agencies, clients, financial providers, consultants, regulatory agencies, media, lobbyists and other organizations" (DOS SANTOS AMARAL, 2017).

Therefore, it´s essential that project managers seek a balance between these expectations and ensure that stakeholders are in constant interaction with a project team that aims at collaborative work for good stakeholder management (DIAS et al. 2016).

Stakeholder management

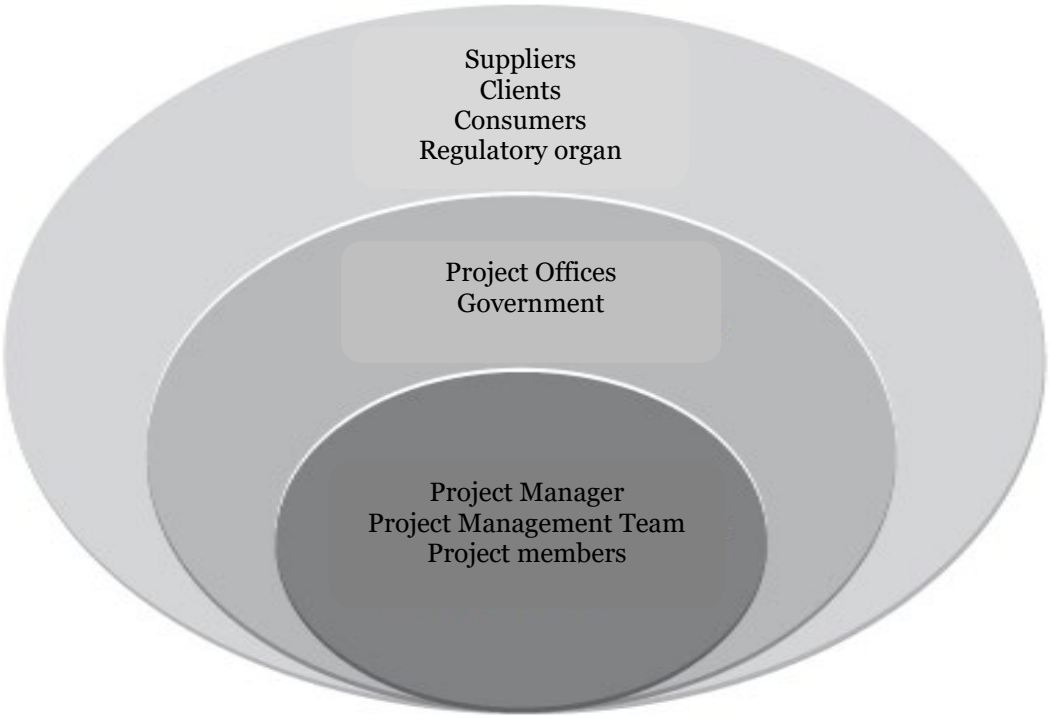
Stakeholders is also defined as any actor, whether individual, group or organization that presents a relationship of interest with the organization (SILVEIRA, 2004). This definition corroborates Freeman (1984) who describes stakeholder as "any group or individual that can affect or is affected by the achievement of the organization's objectives".

When applied to the context of project management, stakeholders can be a small group of stakeholders or potentially millions of stakeholders. There may be different stakeholders at different stages of the project, and the influence, power, or interests of stakeholders may change as the project develops (PMBOK®, 2020).

At various times in the project life cycle, stakeholders may or may not be involved or interested in the implementation of projects, making them essential parts of good project management. During the life cycle, the number of project participants, as well as the information that flows between them is configured as a key factor that affects the management of stakeholders (SAN CRISTÓBAL, 2018).

The diversity of parties, companies, regulatory bodies, project-related teams also impact stakeholder management. Stakeholders or stakeholders can be easily identified in Figure 2.

Figure 2. Stakeholder examples.



Source: The author, adapted from PMBOK® (2020).

For Santos (2020) "stakeholders include sponsors (person or group responsible for providing resources and support for the project), customers and users (people or organizations that approve and manage the product or service resulting from the project), vendors (external people or groups that provide inputs for the project), business partners (external organizations that have a special relationship with the company), organizational groups (internal parties affected by the project), functional managers (parties that exercise the managerial function in the organizational structure) and other stakeholders (public agencies, consultants, various entities et cetera)".

Stakeholder management makes use of processes that can broaden engagement and make project decisions and progress more effective and efficient (PMBOK®, 2017). The purpose is to identify the organizations, groups, teams, people, direct or non-direct components of projects, that impact or are impacted, that influence or are influenced, the expectations created and their impact on the project.

It should be noted that the stakeholder management process covers four activities: i) identification; ii) planning; iii) manage engagement and iv) control management (PMBOK®, 2017). The activities related to each stage can be seen in table 1.

Table 1. Activities of the stakeholder management process.

Process	Description of activities
Identification	Identify (continuously) stakeholders, their requirements, interests and expectations and, as far as possible, manage their influences in relation to the requirements to increase the likelihood of success.
Planning	It´s the process of developing approaches to engage project stakeholders, based on their needs, expectations, interests and potential impact on it. Its main objective is to define strategies to increase support, reduce resistance and minimize negative impacts of stakeholders throughout the project life cycle.
Manage engagement	It´s the process of communicating and working with stakeholders to meet their needs and expectations, address issues, and promote appropriate stakeholder engagement. Reflects new or changed management strategies needed to effectively engage stakeholders.
Control	The main objective of control is to ensure that the organization does not stop growing, always aiming at the efficiency of all its processes. It involves adapting strategies to engage stakeholders through the modification of engagement plans and strategies.

Source: The author, adapted from Kretan (2009) and PMBOK® (2017).

In the field of project management, stakeholder management has attracted researchers who seek to understand its relationships and complexity with other areas of knowledge. However, it´s one that requires caution in decisions that may affect the future of project management and in particular stakeholder management (KERZNER, 2018).

The principles in standards for Project Management

According to Kerzner (2018), the business world changes rapidly, being those with unobstructed vision of the future are more prone to success. This makes it possible for new projects and new forms of stakeholder management to be discussed by organizations, groups, people.

This is the proposal of the “Standard for Project Management”, proposed by PMI (2020). The book shows a dose of principles that enable the project manager to have this transdisciplinarity in the decision-making process that permeates the entire project life cycle,

in addition to the effective management of stakeholders, especially in business environments of extreme complexity and rapid changes.

For San Cristóbal (2018), the new complex and dynamic environments require project managers to rethink the traditional definition of a project and the ways to manage it. Project managers must be able to make decisions in these dynamic but unstable systems, which are continually changing and evolving randomly and are difficult to predict, very different from linear and predictable systems. To achieve this goal, more integrated approaches to project management in complex environments and new methods of planning, scheduling, executing, and controlling projects must be investigated.

San Cristóbal (2018) further claims that traditional project management tools and techniques, based on the assumptions that a set of tasks can be discreet, with well-defined information about time, cost, and resources, and with extensive prior planning and control, are often considered inadequate.

Following this perspective, the PMI (2020) structures the PMBOK® (2020) 7th edition. This new edition revolves around project performance domain and no longer around knowledge area, tools and techniques.

This format is based on principles that encompass all approaches to value delivery and not just the traditional approach. This enables greater autonomy in project management, as it gives the opportunity for the project manager to use the approach that best suits the project, whether predictive, agile, adaptive or hybrid, with not one that is better than the other, but the one that best adapts to a given project (PMBOK®, 2020).

In all, there are twelve project management principles "built around a set of points that best summarize the generally accepted actions and behaviors of project management practice, regardless of the project development approach" (PMBOK®, 2020). This enables project managers, project teams, project stakeholders to act following the basic precepts of the principle.

In this sense, the performance of the stakeholders must act collaboratively and aligned with the organizational strategy in order to deliver value and not just results. They must be oriented to ethics and organizational values as respect for the code of professional ethics, customs and culture. Altogether there are four values identified in the management community: responsibility, respect, fairness and honesty (PMBOK®, 2020).

The 12 principles are set out in Table 2. Because there is no translation that leaves no doubt about the real meaning, we chose to make them available in the original language, English.

Table 2. Principles of project management.

Principle	Characteristic
Stewardship	They act responsibly to carry out activities with integrity, care and reliability while maintaining compliance with internal and external guidelines.
Team	Project teams are made up of individuals who wield diverse skills, knowledge, and experience. Project teams that work collaboratively can accomplish objective sharing more effectively and efficiently than individuals working on their own.
Stakeholders	It engages stakeholders proactively and to the degree necessary to contribute to project success and customer satisfaction.
Value	Continuously evaluate and adjust project alignment to business objectives and intended benefits and value.
Systems Thinking	Recognize, evaluate and respond to dynamic circumstances within and surrounding the project in a holistic way to positively affect the project performance.
Leadership	Demonstrate and adapt leadership behaviors for individual support and team needs.
Tailoring	Designs the development of the project approach based on the context of the project, its objectives, stakeholders, governance, and the environment using Process “just enough” to achieve the desired result while maximizing value, managing costs, and increasing speed.
Quality	Keep the focus on quality that produces deliverables that meet project objectives and align with the needs, uses, and acceptance requirements established by relevant stakeholders.

Complexity	Continuously assess and navigate project complexity so that approaches and plans empower the project team to successfully navigate the project lifecycle.
Opportunities / Threats	Continuously assess exposure to risk, both opportunities and threats, to maximize the positive impacts and minimize negative impacts to the project and its outcomes.
Adaptability and Resiliency	Create adaptability and resilience in the organization and project team approaches to help the project accommodate change, recover from setbacks and advances the project work.
Change	Prepare those affected for the adoption and sustainment of new and different behaviors and processes necessary for the transition from the current state to the intended future state created by project outcomes.

Source: The author, adapted from PMBOK® (2020).

This new approach allows the principles to guide stakeholder activities in an integrated, collaborative and transdisciplinary perspective based on the twelve principles.

Methodology

Systematic literature reviews require considerably more effort than traditional reviews (KITCHENHAM, 2004). An advantage is that they provide information about the effects of some phenomenon other than empirical configurations and methods.

Systematic reviews specify the information to be obtained from each primary study including quality criteria to evaluate each of them (COSTA and TOLEDO, 2016). Thus, this type of study reflects the perspectives, preferences and propensities of researchers in relation to how to conceive the problem, represent the research questions, select the articles and how to treat the results (Sandelowski, 2008).

The development of this systematic review occurs through the Main Items to Report Systematic Reviews and Meta-analyses (*Principais Itens para Relatar Revisões sistemáticas e Meta-análises* - Prisma) and consists of a checklist with 27 items and a flowchart with 4 steps and has as a help the authors to improve the reporting of systematic reviews and meta-analyses (FALCÃO, 2015).

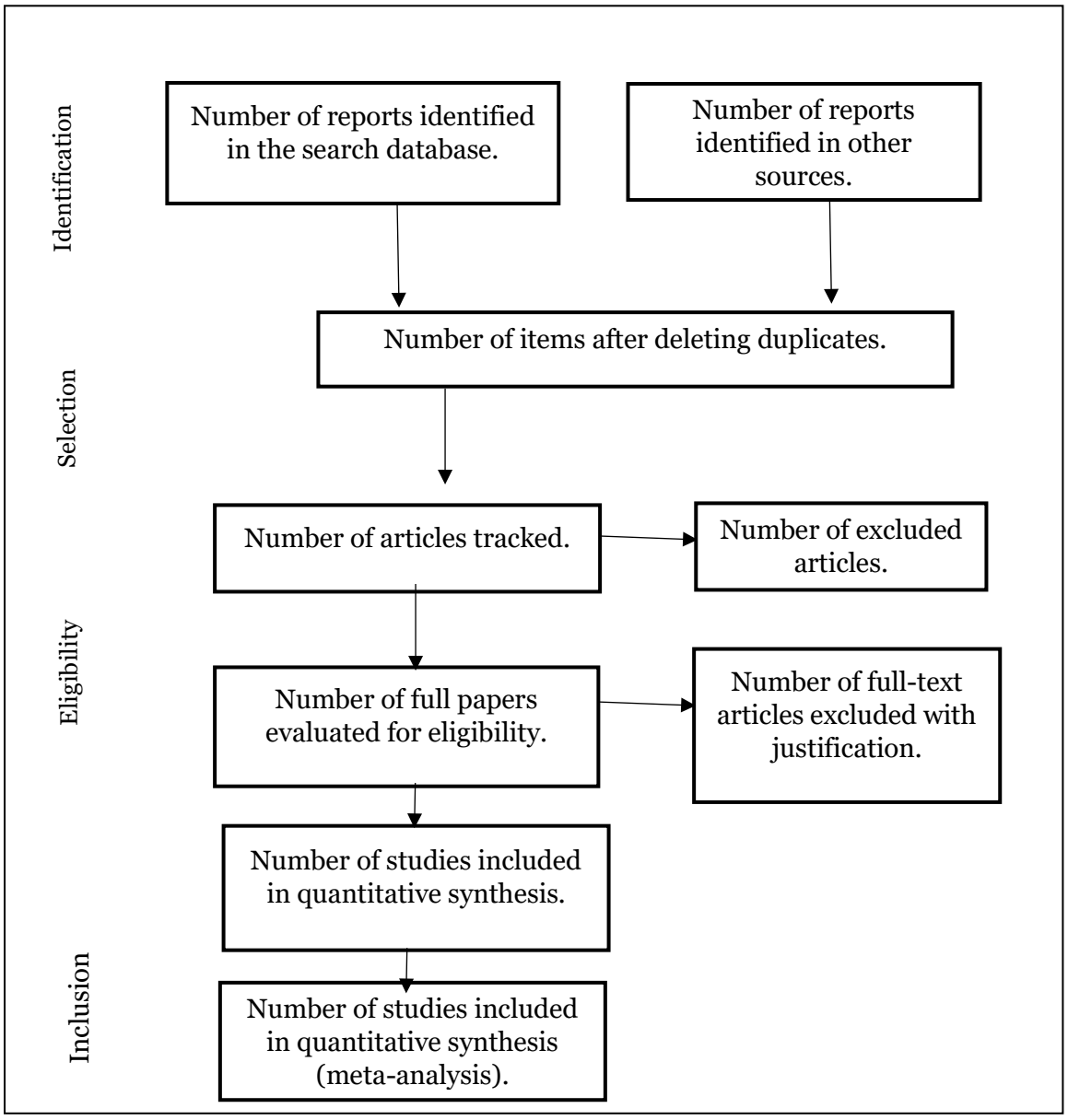
These steps present the items that should be considered for the systematic review: i) identification ii) selection iii) eligibility and iv) conclusion.

The articles were collected on the website of the "*Portal de Periódicos Capes*", due to their accessibility. To choose the articles, the terms "Project management", "stakeholders", "Principles of PMBOK® 7" were used. To select the search period, the years 2020 and 2021 were stipulated as a way to identify the evolution and the way in which the themes were approached. The year of 2020, although not the year of official launch, is justified because it´s the year of availability by the Project Management Institute (PMI) for evaluation to its members.

For the type of documents, "articles" and the language "Portuguese" were selected. In all, 83 articles were found, however, by checking only those in Portuguese, it was possible to identify that 37 partially met the analysis requirements and only 8 articles were reported for the requested period. To identify the searched terms, it was necessary to read the title and summary of the works. The number of 0 (zero) articles was reached that there were indications that related the principles listed in the Project Management Body of Knowledge (PMBOK® Guide), 7th edition.

The search stages until the eligibility of the articles followed those provided for Galvão (2015), as shown in figure 3.

Figure 3. Article Selection Steps.



Source: Galvão (2015).

Final considerations

This study aimed to conduct a systematic literature review on stakeholder management studies in the years 2021 and 2023, in the field of articles deposited in the Journals of the Coordination for the Improvement of Higher Education Personnel (*Periódicos da Coordenação de Aperfeiçoamento de Pessoal de Nível Superior* - Capes) database.

The findings showed that until the year 2021 no studies were conducted that relate the terms "Project Management", "stakeholders" with the principles listed in the "Project Management Body of Knowledge" (PMBOK® Guide), 7th edition. It was found that in the period of the research there were 188 articles deposited.

It´s important to emphasize the importance of the study considering the role of stakeholders in project management as well as the complexity of project management in an environment of extreme dynamism that is the business environment. Likewise, it´s important to highlight that the present study brings important contributions to the development of the state of the art of the theme presented.

Limitations of the study are considered the fact that the Capes journal database has limitations regarding the use of search engines.

For future studies, it´s suggested that the theme be addressed through a systematic literature review with the addition of other databases, as well as other repositories.

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