
Geography and national project: Brazil at the begining of the 21st Century

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Geografía y proyecto nacional: Brasil a inicios del siglo XXI

Resumen. Este artículo busca establecer un ejercicio sistemático de los caminos y tendencias que permiten anticipar las innumerables crisis cíclicas posteriores en el desarrollo del capitalismo brasileño y sus posibles implicaciones en las diferentes y desiguales formaciones sociales que abarcan el mundo. Lejos de la simple yuxtaposición entre las contradicciones fundamentalmente nacionales y los problemas relacionados con el desarrollo de las fuerzas productivas, es en el progreso técnico, expresado por las relaciones desiguales entre el centro y la periferia, donde se encuentran las respuestas a los desafíos y contradicciones planteados en la larga marcha de los pueblos (subalternos) hacia la superación del “camino de la supremacía” mediante la capacidad de tomar el control de su propio destino. Por supuesto, esto se refiere, naturalmente, a la transición del capitalismo (imperialismo) a su etapa superior (socialismo), un proceso que la humanidad sigue gestando en este siglo XXI.

Palabras clave: desarrollo brasileño, progreso técnico, centro-periferia, desigualdad, formaciones sociales.

Códigos-JEL: O14, R11, F54.

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Abstract. This article seeks to establish a systematic exercise of the paths and trends worthy of anticipating the countless subsequent cyclical crises in the development of Brazilian capitalism, and their possible implications in the different and unequal social formations that cover the world. Far from the juxtaposition between the fundamentally national contradictions and the problems that refer to the development of the productive forces, it is in the technical progress expressed by the unequal relations between center and periphery that the answers to the challenges and contradictions launched in the long march of the (subaltern) peoples are found in overcoming the “way of supremacy” through the ability to take your own destiny into your own hands. Of course, it is naturally about the transition from capitalism (imperialism) to its higher stage (socialism) of humanity still in the process of gestation in this 21st century.

Key-words: Brazilian development, technical progress, center-periphery, inequality, social formations.

JEL-Code: O14, R11, F54.

1. Introduction

Situate the challenge of Brazilian development, considering that until the 1980s, this country had become a small global industrial power. However, shortly afterward, it underwent a brutal process of deindustrialization that extends into the early 21st century. This challenge cannot be adequately addressed through mere econometric tasks or simplistic sociology, as argued by Mamigonian (2018), contrary to the assertion of Soares (2014a, p.135), who attributed the political and ideological defeat of the Brazilian left in 2016 to a simple conceptual error of language as a "practical expression of consciousness."

In the case of the national intelligentsia, it is imperative to focus attention on the real national problems influenced by grand politics within the continuities and discontinuities of the historical process. This involves highlighting, above all, its debts with the past. If one aims, from the perspective of a continuous motion, to decipher the concrete reality across its various spheres and specificities, it becomes possible to contribute to its effective transformation. Often, praising past defeats and considering their respective obstacles as the "only route to possible victories" (Santos, 1997, p.17) leads to the mistake of assuming apostasies as crystallized, non-transitory processes of history (Mamigonian, 2014).

Indeed, the theme of industrialization and urbanization, which is directly linked to public utility services, received significant attention in Brazilian geography throughout the 20th century. This gained momentum from the 1950s, with the emergence of the new dynamic center of the Brazilian economy, as noted by Celso Furtado in "Formação Econômica do Brasil." During this period, Brazil began to internalize more strongly and intensively the rhythm of accumulation of its endogenous cycle (Rangel, 1980), consolidating the well-known process of import substitution industrialization widely publicized by the Economic Commission for Latin America and the Caribbean (ECLAC).

During this period, the pioneering work of Brazilian geographers is well recognized. Geographers such as Pasquale Petrone with "As indústrias paulistas e os fatores de sua expansão" (The industries of São Paulo and the factors of their expansion), D. Lino de Mattos with his studies on "Os fatores da industrialização de São Paulo" (The factors of industrialization in São Paulo) in 1957 and "O Parque Industrial paulistano" (The São Paulo Industrial Park) in 1958, and A. Mamigonian with "Brusque: estudo de geografia urbana e econômica" (Brusque: a study of urban and economic geography) in 1960, emerged in the field of industrialization studies long before sociologists and economists. They emphasized the fundamental role of immigrants in predominantly industrial initiatives.

However, it's essential to remember that even before the multiplication of studies on the theme of industrialization in the second half of the 20th century, the 1930 Revolution led by Getúlio Vargas, infused with a strong dose of optimism in the public opinion, had already prompted intellectuals and spokespersons of the agro-exporting bourgeoisie, such as Gilberto Freyre, Sérgio Buarque de Hollanda, Caio Prado Jr., among others, to reassess their positions (Mamigonian, 2015).

If Caio Prado Jr. (1945), a historian with a solid geographic background, briefly commented on Brazilian industrialization in his "História Econômica do Brasil," it was in the debate between the industrialist R. Simonsen (1939), a sharp advocate of industrialization in his work "Evolução Industrial do Brasil," and E. Gudín (1978), a proponent of an agrarian-exporting Brazil as noted in "A controvérsia do planejamento da economia brasileira," that the pros and cons of industrialization trends were clearly evident and have persisted to this day.

In effect, faced with the neoliberal counter-revolution of the 1990s under the governments of Collor and FHC, the theme of industrialization underwent a significant shift. Consequently, its final stage of urban-industrial development, which, in essence, was and still is tied to the privatization of public utility services, particularly in the sector of *rur-urban* infrastructure and equipment, was postponed by the neoliberal policies imposed by the IMF and the Washington Consensus. These policies, including the macroeconomic tripod anchored in floating exchange rates, fiscal targets, and inflation control, had a substantial impact (Mamigonian, 2019).

Faced with this impasse, in recent decades, a wave of pessimism has pervaded the debate on industrialization among a significant portion of the Brazilian intelligentsia, especially among social scientists (economists, sociologists, geographers, engineers, etc.). Some have been swayed by the "Myth of Globalization," as noted by P. Hirst and G. Thompson (1998), while others have succumbed to ideological co-optation and individual self-promotion, as identified by F. Whéen (2007) in "How mumbo-jumbo conquered the world." Consequently, there has been an abandonment of the social commitment that was previously rooted in the research orientations of national interest present in both public and private institutions.

On the other hand, it's intriguing to note that between 1930 and 1980, the Brazilian intelligentsia, despite its diverse political tendencies and controversies, fully explored the role of idle capacity during the intense process of industrialization (Rangel, 1980). They were able to identify under-capitalized and over-capitalized sectors in each Brazilian decade, promoting necessary adjustments and gradually breaking the bottlenecks in the Brazilian economy. However, today, the economy remains stagnant in urban infrastructure sectors (railways, highways, waterways, airways, sanitation, energy, etc.).

In fact, it was precisely during this period that Brazil was able to establish its complete industrial park, with the development of engineering, mechanical, and heavy petrochemical sectors during the 1st and 2nd National Development Plans (under the Geisel government). This positioned the country as the second most dynamic economy in the world in the 20th century. Brazil multiplied its industrial production by 26 times during this period, trailing only behind the Soviet Union, which grew 37 times in the same period (Rangel, 1991).

Furthermore, it's worth remembering that alongside extraordinary industrial growth, Brazil experienced rapid and intense urbanization, welcoming approximately two million new urban dwellers into its cities. In the early stages of industrialization, urbanization progressed hand in hand with endogenous accumulation cycles, providing the necessary urban materials and equipment to support city infrastructure. However, with the expansion of the national integration project through road infrastructure development, a disparity emerged between the industrialization/urbanization duo. The dissolution of the rural complex and the penetration of capitalism into rural areas, promoting the (des)ruralization of society and inserting massive population surpluses into Brazilian cities, led to a strangulation of urban and regional infrastructure sectors.

Moreover, from the neoliberal counter-revolution of the 1990s onwards, Brazil halted its ability to address the bottlenecks created by infrastructure constraints. This led to a delay in massive investments in the identified deficient sectors, exacerbating regional inequalities and pushing the Brazilian economy towards reprimarization. The privatization of the economy ended up being transformed into mere deals, as exposed by Aloysio Biondi in "O Brasil Privatizado" (2014).

Therefore, faced with the challenges posed by infrastructure bottlenecks and the tasks of devising a new economic-financial equation, which involves replacing the concession of

utility services from public companies to private enterprises, i.e., privatizing large and new public services to be developed, while simultaneously nationalizing their financing, this work seeks to resume the debate on the paths of Brazilian industrialization in the 21st century.

Ultimately, it is through the combination of privatization and nationalization that the new pillars supporting the final stage of Brazilian industrialization can be erected. These pillars will be based on fresh and substantial currency emissions (Reais), backed by the tangible assets (fixed capital) of private companies that are concessionaires of the new public utility services to be developed. In essence, the state must become a creditor-mortgagee for investments in the bottlenecked area of Brazilian infrastructure.

2. The genesis and development of brazilian Juglar-Marx cycles

Brazilian social formation in its effort towards industrialization "reveals an impeccable objective logic" (Rangel, 1985a, p.53), inheriting from its past the survival of the process of import substitution of a natural and pre-industrial type in Department I of the economy as a precondition for industrialization proper, *mutatis mutandis*, for the establishment of industrial capitalism.

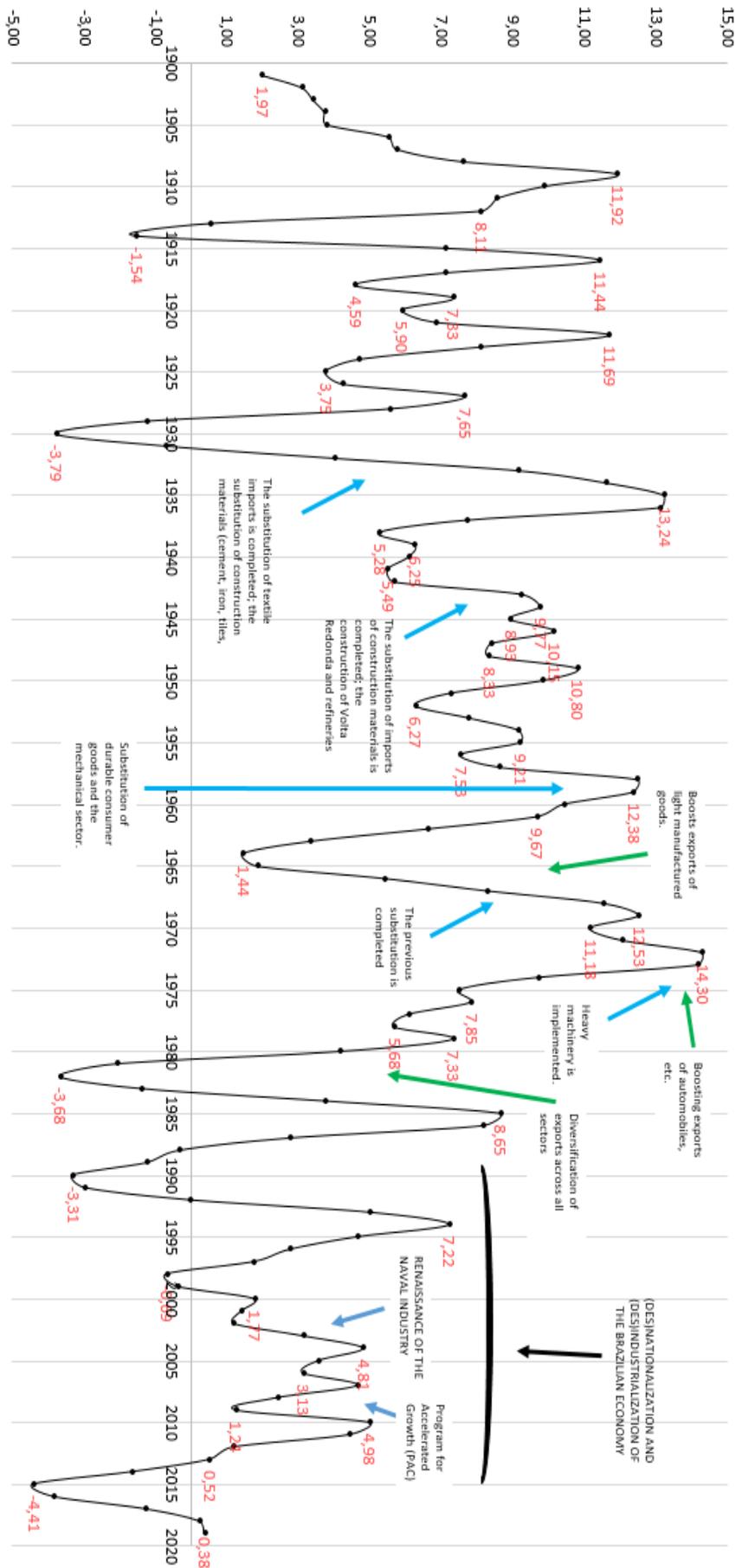
If we take as an example the evolution of medium-term cycles in Brazil (Brazilian Juglar cycles), which are based on property rights upon which the social superstructure is built, and are defined by economic and institutional circumstances, it is possible to perceive, from their regularity of rhythm, magnitude, and duration, that regional development occurs first in the most developed regions of the country and in industries supplying goods that weighed more decisively in the import agenda, "before spreading out 'region after region and sector after sector, throughout the national economic system'" (Rangel, 1983).

Graph 1 and Table 1 invite us to reflect on a possible regional periodization of the Brazilian industrialization process based on Juglar-Marx cycles, where sector after sector completed its industrial structure in the 1970s under the foundations of heavy industry. If we take Brazilian juglar-cycles as a reference, we have approximately a periodicity of seven consecutive and uninterrupted decades, starting in the 1920s (phase b of the 3rd Kondratieff) with an initial effort of import substitution favored by the "so-called falling exchange rate" – that is, devaluation of the national currency (Rangel, 1983, p.41) – especially in consumer goods industries "that controlled the domestic market in high proportions: cigars and cigarettes (100%), footwear (95%), hats (90%), furniture (90%), etc." (Mamigonian, 2000, p.40)².

Further ahead, in the period between 1929 and 1935, the import substitution of the light industry is completed, led by textile products, soon followed by the substitution in the construction materials sector (cement, iron, tiles, etc.). As Fishlow (2013, p.26) pointed out, imports in 1934 "had fallen to half their 1929 peak" and remained "stagnant for five successive years," during which manufactured goods doubled compared to agricultural rates, growing close to 9% annually.

² It is worth noting that in this decade, São Paulo already assumed the role of the locomotive of the Brazilian industry as a privileged space of industrial concentration, with "37.5% in 1929" of the national total (CANO, 2012, p.903).

Graph 1 - Brazilian Juglarian Cycle - 1900-2020



Source: Developed and updated by the author based on unpublished work by Armen Maniigonian. For the years (1901-1911), see - Haddad, Cláudio. Growth of the Brazilian Real Product - 1900/1947. Brazilian Journal of Economics, FGV, Rio de Janeiro, v.29, n.1, p.3-26, Jan./Mar. 1975. *(1912-1947) - Historical Statistics of Brazil: Economic, demographic, and social series from 1550 to 1988/Brazilian Institute of Geography and Statistics - 2nd ed.: rev. and updated from volume 3 of retrospective statistical series. Rio de Janeiro: IBGE, 1990. 642p. *(1948-1952) - National Accounts. Special Supplement. Basic Statistics. Conjuntura Econômica, FGV, Rio de Janeiro, v.30, n.3, p.89, Mar. 1976. *(1953-1992) - National Accounts. Statistical Outlook. Conjuntura Econômica, FGV, Rio de Janeiro, v.53, n.7, p.XXX, Jul. 1999. *(1993-1996) - National Accounts. Statistics. Statistical Outlook. Conjuntura Econômica, FGV, Rio de Janeiro, v.63, n.5, p.XIX, May 2009. *(1997-2005) - Quarterly National Accounts. Volume and Current Value Indicators. New Series. IBGE Indicators, 2006. *(2006-2019) - Quarterly National Accounts. Volume and Current Value Indicators. Oct-Dec. 2019. IBGE Indicators, 2019.

Table 1. Brazilian Industrial Production (1901-2019)

Three-year moving averages (T.M.A.) :			$\frac{1 + 2 + 1}{4}$									
Years	Industrial Production		Years	Industrial Production		Years	Industrial Production		Years	Industrial Production		
	Index	Annual variation	T.M.A	Index	Annual variation	T.M.A	Index	Annual variation	T.M.A	Index	Annual variation	T.M.A
1901	100	2,7	1,97	1941	995,1	10,0	5,49	1981	21966,7	-8,8	-2,08	
1902	103,5	3,5	3,09	1942	992,4	-0,3	5,68	1982	21966,7	0,0	-3,68	
1903	106,15	2,6	3,42	1943	1124,2	13,3	9,25	1983	20670,7	-5,9	-1,38	
1904	111,46	5,0	3,74	1944	1244,5	10,7	9,77	1984	21972,9	6,3	3,75	
1905	114,11	2,4	3,80	1945	1299,3	4,4	8,93	1985	23796,7	8,3	8,65	
1906	120,31	5,4	5,52	1946	1509,8	16,2	10,15	1986	26580,9	11,7	8,18	
1907	130,92	8,8	5,77	1947	1567,3	3,8	8,41	1987	26846,7	1,0	2,78	
1908	130,92	0,0	7,61	1948	1744,4	11,3	8,33	1988	26148,7	-2,6	-0,33	
1909	159,22	21,6	11,92	1949	1924,1	10,3	10,80	1989	26907,0	2,9	-1,25	
1910	166,29	4,4	9,89	1950	2141,6	11,3	9,83	1990	24700,6	-8,2	-3,31	
1911	181,32	9,0	8,56	1951	2278,6	6,4	7,28	1991	24764,8	0,3	-2,98	
1912	202,55	11,7	8,11	1952	2392,5	5,0	6,27	1992	23719,8	-4,2	-0,03	
1913	202,55	0,0	0,53	1953	2600,5	8,7	7,76	1993	25631,6	8,1	4,99	
1914	183,09	-9,6	-1,54	1954	2825,7	8,7	9,16	1994	27694,9	8,1	7,22	
1915	206,97	13,0	7,11	1955	3126,0	10,6	9,21	1995	29002,1	4,7	4,64	
1916	231,74	12,0	11,44	1956	3341,7	6,9	7,53	1996	29312,4	1,1	2,78	
1917	252,08	8,8	7,12	1957	3532,2	5,7	8,62	1997	30560,4	4,3	1,76	
1918	249,43	-1,1	4,59	1958	4104,1	16,2	12,49	1998	29776,8	-2,6	-0,69	
1919	278,62	11,7	7,33	1959	4591,2	11,9	12,38	1999	29216,7	-1,9	-0,38	
1920	298,08	7,0	5,90	1960	5032,0	9,6	10,43	2000	30618,4	4,8	1,77	
1921	291,89	-2,1	6,84	1961	5567,4	10,6	9,67	2001	30429,8	-0,6	1,41	
1922	363,53	24,5	11,69	1962	6002,2	7,8	6,61	2002	31059,6	2,1	1,20	
1923	362,65	-0,2	8,09	1963	6013,6	0,2	3,34	2003	31451,4	1,3	3,13	
1924	392,72	8,3	4,70	1964	6323,3	5,2	1,44	2004	33941,5	7,9	4,81	
1925	402,45	2,5	3,75	1965	6024,8	-4,7	1,85	2005	34672,8	2,2	3,58	
1926	409,53	1,8	4,25	1966	6729,1	11,7	5,41	2006	35398,4	2,1	3,13	
1927	454,63	11,0	7,65	1967	6929,0	3,0	8,28	2007	37589,6	6,2	4,65	
1928	485,59	6,8	5,57	1968	8003,0	15,5	11,52	2008	39142,3	4,1	2,44	
1929	474,09	-2,4	-1,25	1969	8971,3	12,1	12,53	2009	37299,4	-4,7	1,24	
1930	440,48	-7,1	-3,79	1970	9904,4	10,4	11,18	2010	41124,5	10,3	4,98	
1931	446,67	1,4	-0,72	1971	11073,1	11,8	12,05	2011	42822,3	4,1	4,43	
1932	452,87	1,4	4,02	1972	12645,4	14,2	14,30	2012	42488,5	-0,8	1,19	
1933	506,82	11,9	9,14	1973	14795,2	17,0	14,18	2013	43417,2	2,2	0,52	
1934	564,31	11,3	11,63	1974	16052,8	8,5	9,73	2014	42755,5	-1,5	-1,66	
1935	631,54	11,9	13,24	1975	16839,3	4,9	7,50	2015	40288,6	-5,8	-4,41	
1936	743,87	17,8	13,12	1976	18809,5	11,7	7,85	2016	38445,7	-4,6	-3,86	
1937	781,02	5,0	7,74	1977	19392,6	3,1	6,08	2017	38251,3	-0,5	-1,28	
1938	805,78	3,2	5,28	1978	20633,8	6,4	5,68	2018	38425,4	0,5	0,23	
1939	884,5	9,8	6,25	1979	22036,9	6,8	7,33	2019	38628,6	0,5	0,38	
1940	904,85	2,3	6,09	1980	24086,3	9,3	4,15					

Source: Elaborated by the author. For the years (1901-1911), see - Haddad, Cláudio. Growth of the Brazilian Real Product - 1900/1947. Brazilian Journal of Economics, FGV, Rio de Janeiro, v.29, n.1, p.3-26, Jan./Mar. 1975. *(1912-1947) - Historical Statistics of Brazil: Economic, Demographic, and Social Series from 1550 to 1988/Fundação Instituto Brasileiro de Geografia e Estatística - 2nd ed. rev. and updated.

By 1937 (during the Estado Novo period), economic expansion accelerated with the introduction of exchange rate monopolies, creating opportunities "to import capital goods" (Fishlow, 2013, p.27), while at the same time, intermediate consumer sectors gained momentum in the urbanization process of cities and the expansion of wage labor. According to Aureliano (1981, p.126), the apparent consumption of cement doubled in Brazil in just five years of the 1930s, increasing from 309,984 tons in 1932 to 650,732 tons in 1937, with 571,452 tons of cement being domestic in the latter year.

In the 1940s, the import substitution of construction materials was completed, while the construction of state-owned oil refineries began in Mataripe, Bahia, and Cubatão, São Paulo. Additionally, construction commenced on the Companhia Siderúrgica Nacional (CSN) in Volta Redonda, Rio de Janeiro, and the Vale do Rio Doce in Minas Gerais. At this time, the Export and Import Portfolio of the Banco do Brasil (CEXIM), established in 1941, was "the institution that best embodied institutional changes," ensuring, on one hand, a captive market for the large estates in the Gaúcho-type, where the land market was structured as a financial asset, and, on the other hand, the development of the national industry by limiting the so-called "non-essential imports" through the new exchange law (Rangel, 1983, p.40).

Indeed, the recession in the first half of the 1950s imposed a new effort of import substitution, now in the durable consumer goods sector and the mechanical sector. As Fishlow (2013, p.28) recalls, the current account deficit had reached 2.9% of GDP and "could only be financed by resorting to delaying payment of commercial debts."

It was necessary to create a multiple exchange rate system, and Instruction No. 70 of SUMOC, established by "Professor Eugênio Gudín" (Rangel, 1985b, p.45), ended up reorienting "the exchange rate favors and the market reserve of the light industry to certain areas of heavy industry, paving the way for an economic miracle [...] known as the Goals Program" (RANGEL, 1983, p.42) where "subsidies for imports considered essential to ongoing industrialization remained, along with an implicit tax on exports, which received only the lowest exchange rate" (Fishlow, 2013, p.28).

By the early 1960s, the momentum driven by import substitution from the previous cycle had dwindled. Institutional measures began to require greater complexity, as investment opportunities relied not only on governmental policies regarding exchange rates, but also on credit, fiscal policies, and especially on the future expectations of entrepreneurs (RANGEL, 1958a).

With the failure of the Triennial Plan (1962), the securities market for the public sector remained disorganized, as the crisis worsened with the implementation of a regressive tax policy that removed exchange subsidies (Instruction No. 204), while attributing the difficulties of the external sector, and especially the shortage of foreign exchange for imports, to inflation (RANGEL, 1963b). It can be said that the political crisis that would lead to the military dictatorship in Brazil in 1964 emerged from these economic disturbances that various stabilization plans failed to address, precisely because they did not consider the complexity and causes of the inflation phenomenon.

Ignacio Rangel (1985a, p.44) was the one who best understood these mistakes when he drafted the "Projeto de Decreto Legislativo 156-A/1962," which, even though rejected "by the Special Commission tasked with reviewing it," had perceived and anticipated the real causes of inflation, and the institutional measures for monetary correction (economic indexation) capable of addressing them, ensuring, through orders, a market for the national industry and the search for new external markets with bilateral agreements boosting exports

of light manufacturing industries (Rael, 1963b).

Certainly, the economic-financial operation implemented by O. Bulhões, by indexing the economy through monetary correction, created "a new and vigorous financial intermediation apparatus" (Rangel, 1983, p.42), leading to a dizzying industrial development known in historiography as the "Delfim's miracle" (1968-1973). This resulted in a "gigantic effort" by the State in capital formation in sectors such as heavy industry (mechanical, petrochemical, engineering), energy, urban services, transportation, etc., completed by the Development Plans (PND) of the Geisel Government (Rangel, 1985, p.46).

During this period of economic development, even without the need to alter income distribution, idle capacity was widely utilized, generating effective demand due to the "galloping" urbanization, which helped mobilize private funds "through the National Housing System and the National Housing Bank" (Rangel, 1985b, p.46). This also led to a decline in the inflation rate from 88.4% in 1963 to 15% in 1971, while "the growth rate of industrial production increased from 0.2% to 12% and GDP from 2.8% to 11.3%" (Rangel, 1985b, p.47).

By the way, it was from these institutional measures – freezing the monetary correction for large construction projects and new factories - that ensured the resumption of growth and provided the foundation for the Brazilian economic miracle (1969-1973), transforming Brazil from a simple producer of intermediate consumer goods to a producer of capital goods, realized with the development of Department I of the economy (heavy machinery, chemical industry, and construction) during the Geisel government (RANGEL, 1985b).

In the current historical context, one could argue that Brazilian social formation is still in a state of waiting in shaping its 4th duality since the 1980s³, thus delaying the necessary transformations in the set of institutional measures capable of opening a new cycle of national optimism, anchored in national development. As Mamigonian (2021, p.422) recalls, during this period

The industrial building had been completed with heavy mechanics and heavy engineering, and the national banks had already attended the nursery school of financial capitalism, as he claimed, by backing real estate developers, who impressively verticalized the large and medium-sized cities throughout Brazil. The banks had gained experience and conditions to intermediate investments or public services granted to the private sector, including the issuance of infrastructure debentures, as they are offering today, albeit many decades late. Along this path, the national banking system, both state-owned and private, could replace the American financial system, part of the power pact of 1930, but which was beginning to hinder Brazilian economic growth.

From there, for Mamigonian (2021, p.408),

Instead of this possible evolution, starting in 1990 with Collor and FHC, a counter-revolution replaced national-developmentalism with neoliberalism: 1) American financial capital (banks and industries) became hegemonic, 2) the Brazilian industry, a subordinate partner of the 1930 pact, was ousted from power, 3) the feudal latifundium (North and Northeast), politically powerful but economically declining,

³ As pointed out by Mamigonian (2021, p.422), the 4th Duality presented itself as a possibility suggested by I. Rangel, as the Brazilian industry moved towards the State as the major partner of the Power Pact, alongside the old feudal latifundium, which appears in the form of a capitalist rural enterprise, thus a progressive dissent from the 3rd Duality acting as the minor partner. This transition within the latifundium can be seen by the "replacement of the serf" by the "wage laborer", while at the same time "manual labor begins to be actively replaced by machinery and chemistry" (Rangel, 1992, p.240).

participated in the counter-revolution, as did 4) Brazilian banks, occupying an economic and political subordinate space to American financial capital. This entire counter-revolutionary bloc, under the command of the USA, began to paralyze the Brazilian economy and the national State, as well as causing the decay of political and cultural life in Brazil.

As a way to illustrate this period of dismantling of the national industry by neoliberal policies, one only needs to observe the sale of large Brazilian companies to foreign capital, as noted by Corrêa (2004, p.101):

The Metal Leve (sold to the German Mahle, in association with Cofap, in 1996); Cofap (sold to the Italian Magneti Marelli, in 1997); Freios Varga (to the British Lucas Variety group, in 1997); Arno (sold to the French group SEB, in 1997); Brasmotor (to the American Whirlpool, in 1997); Agrocere (to Monsanto, in 1997); Eldorado supermarket chain (to the French Carrefour, in 1997); Quartzolit (to the Saint Gobain Group, in 1997); Gevisa Locomotivas (sold to General Electric, in 1997); Batavo (to Parmalat, in 1998); Mallory (sold to Moulinex, in 1998); Lojas Renner (to the English J. C. Penney, in 1998); Chapecó (to the Macri group, in 1999); part of Aços Villares (to Sidenor, in 2000); Portobello (to Glencore, in 2001); etc.

In other periods of intensification of neoliberal policies, such as: 1) the Dutra Government (1945-1950), which promoted economic liberalization, destroying national initiatives like Pneus Brasil (RJ), replaced by foreign companies like Firestone, Pirelli, Goodyear, as well as the aluminum factory in Saramenha (MG), founded by A. Gianetti (1934); 2) and the Castelo Branco government (1964-1967), which "under American influence, destroyed FNM as well as national groups like Jafet and Panair do Brasil" (Mamigonian, 2021, p.419); the privatizations and denationalizations of the 1990s were more brutal than the earlier ones mentioned, destroying a large part of the national groups that emerged from "modest initiatives"⁴ and naturally were in line to assume the Pact of Power of the 4th Duality.

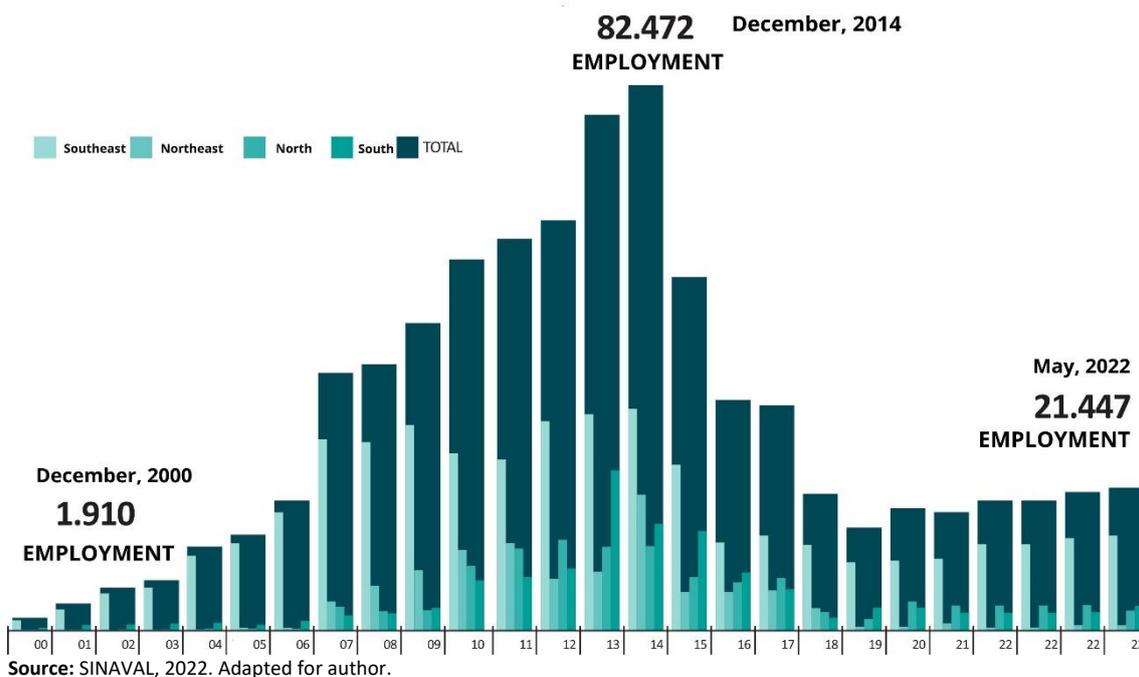
In the 21st century, some initiatives to resume development were initiated during the Lula government, when in 2006, with the creation of the PAC, there was the cooptation of the private sector, - which "revived the animal spirit of entrepreneurs" - calibrating "fiscal, monetary, and exchange rate policies" with government-induced investments based on "their rates of return" (Delfim Netto, 2018).

It is interesting to note that during this same period of economic growth and social inclusion (2006-2012), 'progressive' intellectuals immersed in the misconceptions of the

⁴ As demonstrated by Mamigonian, a large part of the origin of the Brazilian industrial bourgeoisie was composed of immigrants such as "Pereira Ignácio, a Portuguese immigrant, a shoemaker at the beginning of his life, like his father, was the creator of the Votorantim group (Ermírio de Moraes) [...] F. Matarazzo, who began his life in the trade of animals in Sorocaba, gave birth to a powerful industrial group [...] Luiz Dumont Villares, son of a Portuguese and an electrical engineer trained in Switzerland, set up a workshop in São Paulo for elevator repair, from which emerged a powerful group that stands out in the production of elevators, excavators, overhead cranes, diesel engines for ships, special steels, and molded parts. The Klabin family restarted a modest paper trade in Brazil, from which they expanded to become the largest industrial group in the paper and cardboard sector in Latin America, as well as having a strong presence in the production of tiles, auto parts (Metal Leve), etc. The examples could be multiplied. In Rio Grande do Sul, we would mention the names of Renner, Micheletto, Eberle, Wallig (the largest stove industrial group in Brazil). In Santa Catarina, in addition to the names mentioned above, we would add Schmidt (Tupy foundry), Zadrozny (Artex), Wernwe (Eletro-aço Altona), Fontana (Sadia), Zipperer (Cimo Furniture). In São Paulo, Filizzola, Ramenzoni, Fileppo, Scuracchio, Crespi, Gasparian, Samello, Jafet, Irmãos Cruaães (workers until 1945 and current owners of the largest woodworking machinery industry in Brazil). In Rio de Janeiro: d'Oline (Aurora fabrics), Muller (road rollers, etc.), Oliveira (Luz mill)." (Mamigonian, 1969, p.59-60).

Cepal-Dependency theory considered Rangel's theses on long cycles (Kondratieff) and medium cycles (Juglar-Marx) to be exhausted - the latter regulating and scaling the renewal of fixed capital, 'sector by sector' (Rangel, 1983, p.33) - without realizing, for example, the resurgence of the shipbuilding industry, with the construction of national shipyards exclusively focused on the domestic market - with investments totaling 5.5 billion dollars from BNDES (Dores; Lage; Processi, 2012), thus opening an expansive period of our Brazilian Juglarian cycle, as can be observed in **figure 1**.

Figure 1. Employment in shipbuilding industry 2000-2022



On the other hand, it is evident that the true engine of the crisis in the following cycle (2012-2016) was a combination of factors such as economic voluntarism, mutual distrust between the government and the private sector, as well as a widespread rejection of politics by a "boorish" right and a "imbecilized" left that has appropriated a large part of Brazilian youth (Delfim Netto, 2018, p.353).

In the first and second aspects, the belated adoption of exchange rate policies that allowed for controlling "predatory imports" – currency devaluation only began at the end of 2014 – resulted in a doubling of the number of importing companies compared to exporting companies from 2006 to 2014. Meanwhile, highly competitive domestic firms in former industrial zones were forced to relocate to other regions of the country or to other countries, as seen in the case of footwear industries in Rio Grande do Sul, such as Grendene and Azaléia, which established themselves in the Northeast (Castro and Amorim, 2013). Additionally, numerous textile industries, like Riachuelo in Rio Grande do Norte, recently relocated to maquila zones in Paraguay to replace Chinese imports (Scheller, 2017).

Indeed, as discussed in another article, it is possible to observe that in these industrial zones, the massive capital flight to other regions combined with a growing increase in unemployment and labor precarization led a significant part of the working class to a split in the power bloc engineered by the Workers' Party during the Lula and Dilma governments (Ramos, 2017). This was exacerbated by the support of the oligopolized media, unanimously

opposing the state's intervention in the economy, Brazilian laborism, and the PT itself (Lage, 2014).

Furthermore, in the last aspect, the democratic choice of not politicizing both the Supreme Federal Court and the Armed Forces "with the promotions of officers" (Delfim Netto, 2018, p.377) by the Workers' Party revealed the inability to resolve the old paradox anticipated in a 1968 article by Ignácio Rangel, "Privileged or Surplus," recalling that even with the expanding economy, "less unemployment can prove catastrophic," as was the case in France from 1966-68. In the words of the unarmed prophet, "against irrationality, only the irrational reason of the baton, tear gas, etc." (Rangel, 2005b, p.599). What did the street movements complain about in 2013-2022, if not the numerous social advances obtained in the most varied sectors of Brazilian society throughout the PT governments?

3. National project in the 21st Century

In this sense, and not of lesser importance, it would be appropriate to make some considerations regarding the discussions surrounding the debate on the National Project and the possible socialist transition in the 21st century. Taking part in the two most advanced and diametrically opposed Brazilian classes in terms of interest commitments, namely the progressive bourgeoisie and the proletariat (Soares, 2014b), it is possible to say that there is, without a shadow of a doubt, theoretical consensus between both parties regarding the systematization of a long-term national project, but, in our understanding, they do not resist "the temptation to throw out the baby with the bathwater, that is, to abandon the categories of historical materialism" (Rangel, 2005b, p.633) – or, in other words, the presence of "socialism" (Rangel, 2005a, p.705).

In his article "A National Project, Please," Delfim Netto mobilizes Brazilian society towards "a minimum social consensus around a National Project capable of uniting [...] wills through the democratic process," based on the "philosophy of the 1988 Constitution." He reiterates the idea of the necessity of a Strong State, "constitutionally regulated and with the power to adjust markets, particularly the financial one," through strategic planning (25 years) - of necessary investments in infrastructure in the bottlenecked sectors of the economy - via the private sector. Furthermore, drawing from the contributions of his peers such as Celso Furtado and Roberto Campos at the theoretical level, as well as the debate between E. Gudín and Roberto Simonsen on the practical level about Brazil's direction, Delfim argues that neither "laissez-faire, which produces a random path, nor real socialism, which restricts freedom as it increases its inefficiency, is able to meet it" (Delfim Netto, 2017).

Carlos Lessa, in addressing the absence of a National Project in our days, reveals that in a democratic regime there is no economic policy capable of reactivating economic growth without taking into consideration essential rights such as employment, work, and public activity planning that can guarantee a "great reference agenda for youth" (Lessa, 2011; 2015) unless the National Project is subordinated to the suggestion of "so-called minimization of public spending" by the Washington Consensus, which places the nation as a "figure derived from the game of companies" (Lessa, 2017).

So much so that Darc Costa, in delving into the theme of the National Project, invites "Brazilian diplomacy [...] to position the country in the region as a third party interested in the dispute that will take place between China and the US for the domination of international trade" (Costa, 2017), anchored in the inseparable triangle "which links what to do with how to do it and with what means to do it", since "national policy or national project" only responds

to "what to do" (Costa, 2010, p.2-4). He also argues that random interventions are not enough without a "vision of systemic structuring," without a larger planning than sectoral planning - the case of the PAC where the logistics sector was disconnected from the energy sector is singular in this regard - to ultimately put an end to the idea of neoliberalism (Costa, 2016, p.283).

It is curious to observe that during this long period of deindustrialization of the Brazilian economy, the debate on what to do, how to do it, and with what means to do it to solve the industrialization crisis has not gone beyond the semantics of re-primarization among Brazilian social scientists, even though there may be considered a certain consensus between orthodox and heterodox economists that Brazil has gradually faced over these four decades: 1) the significant decline of industry in GDP,⁵ and; 2) that the attempts to resume economic growth in the 2000s were favored by the boom in commodity exports to the Chinese market, consequently allowing for the maintenance of a primary surplus.

However, if the resumption of the debate has the merit of opening dialogue among internal political forces aiming to build a program of "national unity," there is clearly significant disagreement in the explanation of the exchange rate issue and the rise in interest rates, if not the lack of diagnosis of the background covering the fundamental contradiction set in motion by the depressive phase of the 4th long accumulation cycle opened in 1973 and which still prevails today, as well as its peculiarities and irregularities sustained by the management of small local crises by Central Banks that eventually culminated in the 2008 crisis.

Indeed, without a perspective on the persistence of center-periphery relations that permeate the universe of the transition from imperialism to socialism in this 21st century, it is impossible to think and propose solutions for foreign trade planning as well as gross fixed capital formation without a minimum degree of planning. Moreover, when the issue of the national question is put into debate, the problem involving the construction of a strategy for sustained long-term national development, there is a tendency in analyses to escape into the disciplinary environment of mainstream economics specializations, without any involvement in the search for a national standpoint anchored from an interdisciplinary comprehensive view, or so to speak, from a perspective of totality.

In other words, in the 21st century, the National Project must be defined from intelligible historical categories whose structure, form, and function are defined by the transition process, which, in our current historical phase, finds its course in the rivalry between capitalism and socialism in this 21st century. This means that any attempt to present planning as a "pure general planning" is nothing but "a myth" (Rangel, 1957a, p.76), just as considering, as Corsi (2008, p.68) suggests, that the concept of National Development Project must be understood "not as a project that integrates the collective interests of the nation, but as a project of each class and class faction for the nation," does not fail to disregard the peculiarities and particularities of the objective laws of Brazilian development.

As it is known, Brazil, as one of the "child nations" that emerged in the second half of the 20th century, differs completely from the nations that emerged in the previous century, and even from those that emerged from the democratic-bourgeois national movements in Europe and Asia in the early 20th century imbued with the right to "self-determination of peoples," as Lenin pointed out (1984), asserting their "sovereignty," "unity," and legal and

⁵ Even the orthodox economists, who went so far as to correct the historical series of value added by the Brazilian industry, admit that the industry's share "went from 25% in 1985 to 15% in 2011" (BONELLI and PESSOA and MATOS, 2013, p.49).

political framework for the national market," because according to Rangel, Brazil, as a child nation, is born through the categorical affirmation of development, manifested "by the will to plan or program this same development" (Rangel, 1963a, p.7).

Indeed, the first "pre-scientific" initiatives of planning/projecting⁶ oriented by the CEPAL planners (structuralists) resulted in "an effort of rationality in resource allocation," an effort, moreover, "forward-looking," leveraging the process of import substitution crowned by the I Goals Program (1956-1960). However, if this effort "knew how to establish norms for the proper application of these resources" at the level of the firm's economy, it lacked recognition of the effort that should be made "backward," that is, to find the means of utilizing the existing idle capacity, taking advantage of its "productive potential" and its factors, such as the use of facilities, labor, "in addition to natural resources," etc. (Rangel, 1963a, p.26).

Indeed, faced with these conditions of idle capacity/resource allocation issues, Ignacio Rangel (1957a) developed an entire conceptual framework capable of answering the questions of what to do, how to do it, and with what means to do it, so that the National Project has its "raison d'être." Initially, it is necessary to scientifically define the programmatic basis of the National Development Plan, so that state intervention is rationally programmed/projected, as the challenge lies not in the theoretical field, but rather in the practical one, with "projecting" being the "action on the units" - which decides actions under the quantitative change of factors (man, labor, and life), sometimes "changing the number of units," sometimes causing units of different sizes to emerge, which can "unfold into changes in quality" - and "programming," which is the action at a higher level "on the national system" (Rangel, 1957a, p.131).

This means that when it comes to resource allocation, we are addressing the question of "what to do" for the elaboration of the General Plan - because this is where the Project makes sense - while the selection of technique, in this case, directly answers the "how to do it," and for that, it is necessary to know the structure of resources. This condition leads to the problem of adopting Project priority criteria, which, to be effective, must remain under the discipline of programming and not of the market (consumer dictatorship). Discovering which "activities should be developed primarily" is already "almost halfway there," since planning will "become the problem of project elaboration and analysis" (Rangel, 1987, p.63).

In this sense, the fundamental rule to be adopted here is the production of "things" that we do not possess through the judicious use of what we have available in our hands, thus balancing the available resources without the need to negotiate national sovereignty. Therefore, the role of selecting the technique to be used is based on solving the problems of converting the things we lack into the things we already produce, or possess as productive potential, since labor can only be considered "productive if it manages to add some portion of utility to the product contained in the factors, which is sacrificed in the production process." In other words, the foundation of the "technique lies not in technology, but in economics" (Rangel, 1958c, p.173).

⁶ Even the Soviet Union was forced to realize that the nation is a precondition for the Plan, even under all "the universalist positions of proletarian internationalism," that is, the nation is, objectively, the structure that best satisfies the preconditions of planning, thus acquiring a new and decisive *raison d'être*" (RANGEL, 1957b, p.15).

4. Final remarks

Therefore, for the purposes of rational planning, the usual task consists of deciphering the available private and public resources in the Brazilian economy, indicating the available resources of technology (abundant and scarce) so that the solution for converting the former into the latter can be found. However, considering that a large part of the resources of the Brazilian economy (savings) is concentrated in the hands of the private sector (individuals), planning must be carried out in such a way that these same individuals are interested in investing. Departing from this basic rule "will create a demand structure for financial resources incompatible with the true structure of the supply of these same resources," projecting a currency crisis and the country's indebtedness, since, if the currency behaves as the main axis of the national market system, by disregarding the real structure of the supply of resources, we move towards insolvency abroad, and by ignoring the financial structure of the same supply, we move towards the collapse of supply (Rangel, 1958b, p.165).

That said, the path to be followed is to promote import substitution by filtering the list of imports, fixing the exchange rate for each specific case, studying the relative cost curves of potential industries, as well as the qualitative examination of costs - which allows to distinguish "true substitutions from false ones" (Rangel, 1990, p.119). Hence arises the need for planning of foreign trade, because as is known, the balance of payments is nothing but accounting fiction if generalized, that is, if not treated as a series of balance of payments with specific problems. And in this case, it is necessary to plan foreign trade directed towards areas where our currency appears scarce, areas where every effort to expand exports is not indifferent to the volume of our own purchases, thus, by fixing the volume of trade with these countries, using the idle sectors of the national economy, initially underutilized. On the other hand, the effort of import substitution should be directed towards goods and services from countries where the currency is scarce for us, thus taking advantage of the benefits of the international division of labor (Rangel, 1958b).

In summary, the criterion for foreign trade to identify which foreign currencies are scarce is the very experience of trade, knowing the purchasing behavior of certain areas and the variations in imports from them. Thus, it is possible to convert the availability of certain currencies into availability of products or productive capacity within the Brazilian economy (Rangel, 1958c).

In fact, from these observations presented, two issues can be extracted that are of closer interest and deserve to be taken to their ultimate consequences for the resumption of the Brazilian National Project throughout this long 21st century. The first is that for the effects of cyclical conjuncture, "without planning there can be no development, because planning is the supreme use a nation can make of sovereignty" (Rangel, 1958c, p.173). However, as already noted, the path from Project to Plan needs to be equated, in light of establishing "the scale of priorities," grouping projects "according to the specification of the resources to be used, both in construction and in operation" (Rangel, 1990, p.120).

Naturally, it is the project that builds the Plan, and as projects create demand, "scarcity tends to turn into pressure on the balance of payments," and in this sense, the State is called upon to anticipate the decisions of the imbalances created, whether by "manipulating the exchange rate," or in the execution of projects related to derived demand, creating investment opportunities (Rangel, 1990, p.121).

The second question concerns the imperative of idle capacity (areas of savings) and bottlenecks (areas of investment) that accompany the medium cycles (Brazilian juglar cycles)

in the process of import-substituting industrialization and its self-sufficient economic entry into the international division of labor, which is of closer interest to the formulation of the General Plan. The utilization of idle capacity for planning purposes appears "as the meta-synthesis of the plan, that is, as a means of producing a redistribution of income," behaving far beyond a simple "alternative to external indebtedness and wage repression" (Rangel, 1982, p.168). In summary, for there to be serious planning, capable of determining the prospects for the continuity of the process and quantifying the time for projects to mature and initiate new imbalances, it is necessary to start from these basic assumptions presented.

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