

# Evolving contours and challenges of private higher education in Brazil

Center for Global Higher Education

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# Study #1

Carvalhaes, Flavio; Medeiros, Marcelo; Tagliari, Clarissa. “Higher education expansion and diversification: privatization, distance learning, and market concentration in Brazil, 2002-2016”. *Higher Education Policy* (2022).

# Study #2

Carvalhaes, Flavio; Souza, Pedro; Banaggia, Gabriel;  
Maciel, Fabio. *Work in progress*

# Motivation



# Motivation

## Context:

A **literal** operation and consolidation of a market not only of higher education services but of HE organizations / institutions themselves

## Analytical lenses:

What are the available analytical and methodological tools to study higher education expansion?

- Diversity: heterogeneity of types of organizations
- Concentration: resources

# Concentration

The level of concentration (or dispersion) of any type of resource can be reached by comparing how a certain set of units appropriates a certain amount of resources. This distribution will be considered "equal" if the resource is distributed in equal proportion among the number of units. If a certain unit (or its set) has an overrepresentation in the appropriation of the resource, its distribution is classified as "concentrated".

Atinkson (1970)

# Context

- i. 1996: Pro-Market reforms. Deregulation & authorization of for-profit institutions,
- iii. 2005: regulation and authorization of distance higher education;
- vi. 2017: Deregulation of distance higher education,

# Research questions #1

- How did Brazilian higher education expand?
- How do different institutions take advantage of the expansion?
- Was higher education expansion concentrated in a few institutions?
- Does a specific segment of the higher education system drive concentration?



# Research questions #2

- Who are the winners and losers of HE expansion in Brazil?
- What are the components of growth? Was it "organic growth"? Fusions / consolidation?
- Was there space for non-profit organizations?
- How did public institutions behave?
- What is the impact of considering diferente units of analysis?

# Data

- Higher Education Censuses
  - Microdata from 2002 to 2016
  - Microdata from 2010 to 2023
- Register data from the Ministry of Education

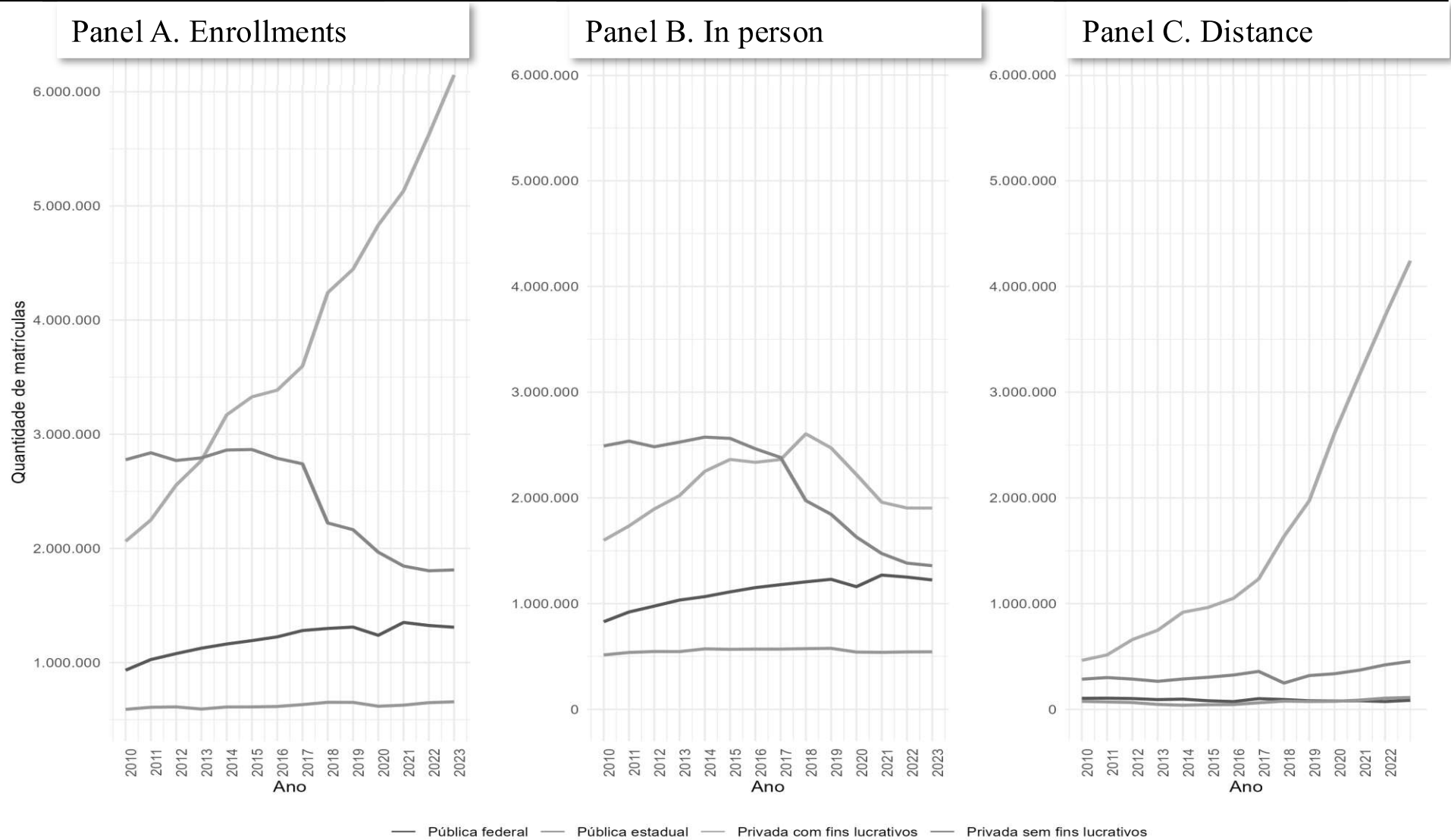
# Table 1. Growth concentration, by size of institution, yearly, Brazil, 2002-2016

**Growth concentration, by size of institution, yearly, Brazil, 2002-2016**

Year	Size					Total %	Total N
	0%-80%	80%-90%	90%-95%	95%-99%	99%-100%		
<b>2002</b>	0%	0%	0%	0%	0%	0%	3,441,802
<b>2003</b>	2%	0%	1%	3%	3%	9%	3,841,137
<b>2004</b>	4%	1%	2%	5%	4%	15%	4,115,712
<b>2005</b>	6%	2%	3%	6%	7%	23%	4,447,556
<b>2006</b>	7%	2%	3%	8%	9%	30%	4,751,720
<b>2007</b>	9%	4%	4%	8%	13%	38%	5,106,395
<b>2008</b>	10%	4%	5%	12%	19%	51%	5,674,486
<b>2009</b>	10%	4%	5%	15%	19%	53%	5,762,292
<b>2010</b>	13%	6%	6%	18%	20%	62%	6,179,802
<b>2011</b>	15%	8%	7%	20%	21%	71%	6,544,832
<b>2012</b>	16%	9%	7%	20%	25%	77%	6,836,394
<b>2013</b>	18%	9%	8%	21%	28%	84%	7,115,020
<b>2014</b>	19%	12%	9%	23%	32%	95%	7,632,045
<b>2015</b>	20%	13%	10%	24%	33%	100%	7,821,048
<b>2016</b>	19%	12%	10%	24%	35%	100%	7,840,404

Source: Censos Escolares 2002-2016, INEP, microdata

# Figure 1. HE Growth, 2010-2022



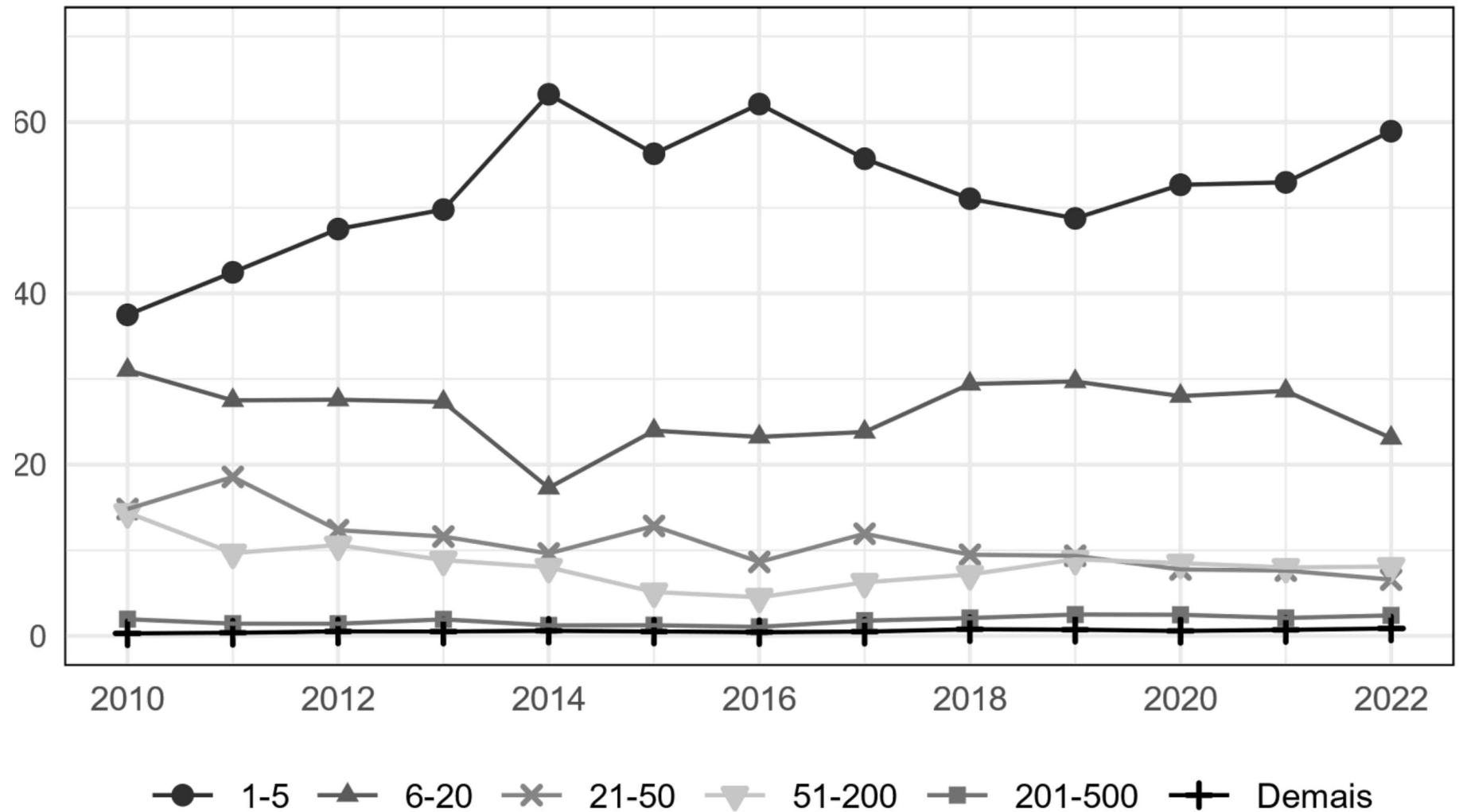
**Table 2. Net enrollment growth by mode of delivery and sector.  
Brazil, 2010-2022**

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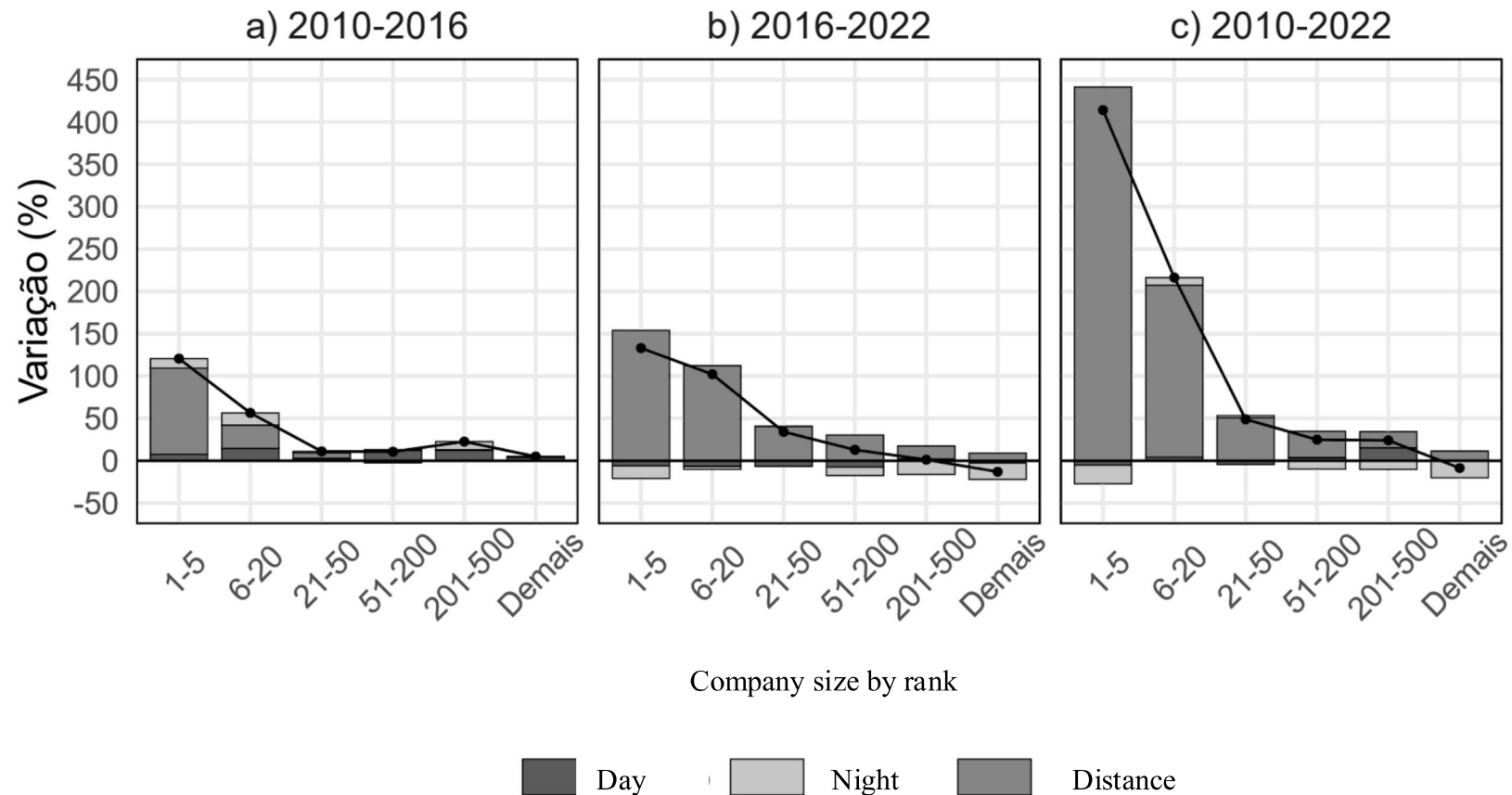
<i>3.061.764 new enrollments from 2010 to 2022</i>		
In person	Public, federal	14
	Public, state	0.8
	Private for-profit	10
	Private non-profit	-35
	Other	-1
Distance	Public, federal	-1
	Public, state	1
	<b>Private for-profit</b>	<b>106</b>
	Private non-profit	4
	Other	0.05

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Figure 2. Distance education share by company size. Brazil, 2010-2022



# Figure 3. Incidence growth by company size, 2010-2022



# Table 3. Number of enrollments involved in fusions, 2010-2022

Year	Enrollments	Enrollments in fusions	
		#	% year
2010	6379015	58622	0,92%
2011	6739689	296498	4,40%
2012	7037688	22909	0,33%
2013	7305977	19152	0,26%
2014	7828013	39526	0,50%
2015	8027297	273963	3,41%
2016	8048701	42092	0,52%
2017	8286338	113348	1,37%
2018	8449521	102938	1,22%
2019	8601965	35765	0,42%
2020	8678000	7268	0,08%
2021	8983830	56135	0,62%
2022	9440779	-	-



# Discussion

Concentration as an important analytical and methodological tool to study educational expansion in BR context

Consequences of market deregulation and technological change

Paradoxes of for-profit sector of educational systems in developing countries

How to foster and measure quality in this context?

How to expand the system with low burden for families and students?

# Discussion

Regulatory changes

Diploma mills? Credentialism?

What are the impacts of the type and scale of this growth? It affects both HE providers but also the whole system of professions that react to this in different shapes and forms

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