

The Four Worlds of Brazilian Educational Reform

A Comparative-Historical Analysis

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Section 1

Introduction

Research Question

Why does the Brazilian educational system differ so markedly from other OECD countries?

- Astonishingly high share of students in private institutions (~80% at tertiary level)
- Tracking is formally nonexistent
- Post-secondary education attainment is one of the lowest and markedly unequal

Goal: Explain Brazil's educational lag and institutional characteristics through comparative welfare state theory and historical institutionalism

Paper's Contribution

Long-run perspective on Brazilian education:

- Trace education lag and its reforms from the colonial era to recent decades
- Applying comparative welfare state theoretical framework to education
- Analyzing three interrelated dimensions:
 - ① **Expansion** of educational attainment
 - ② **Commodification** of educational provision
 - ③ **Stratification** through state regulations

Central argument: *Brazil's hybrid educational system results from gradual institutional change through layered reforms inspired by distinct regime logics, leading to Brazil's "platypus" educational system.*

The Brazilian Educational Puzzle

Why does Brazil's educational system differ so markedly from OECD countries?

Distinctive Features:

- Astonishingly high private enrollment (80%)
- No formal tracking system
- Lowest post-secondary attainment in OECD
- Extreme educational inequality

Data Sources:

- Lee and Lee (2016): Enrollment 1820-2010
- Paglayan (2021): Primary education 1828+
- Kang, Paese, and Felix (2021): Brazil 1930-1964
- IBGE & INEP: Official statistics

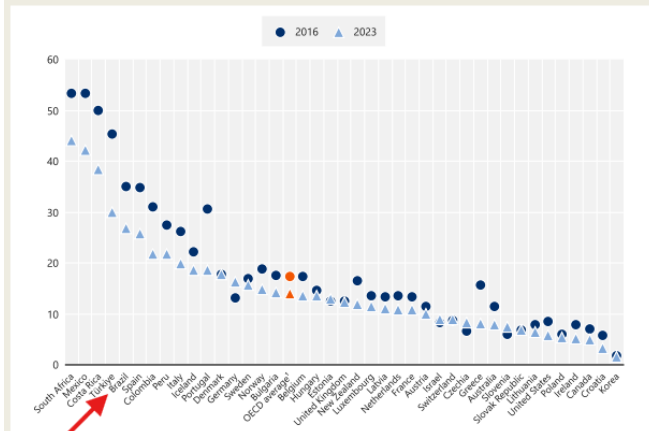
Brazil's Educational Position in OECD Context

Education lag:

- Brazil has the **lowest education attainment rates** among OECD countries
- Only 21% of adults (25-34) have tertiary education
- OECD average: 48%

Figure A1.1. Trends in the share of 25-34 year-olds with below upper secondary attainment (2016 and 2023)

In per cent

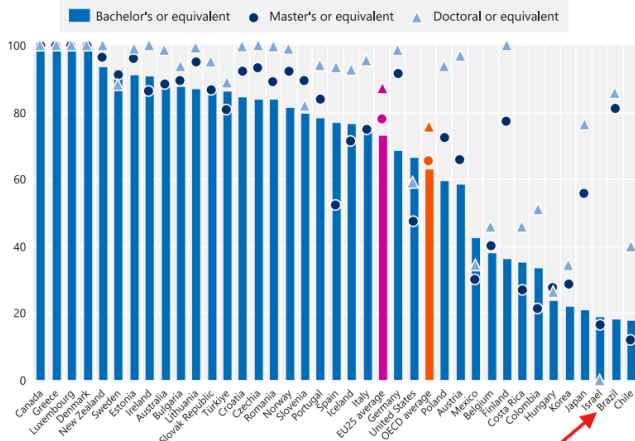


Brazil's Educational Position in OECD Context

Extreme commodification of tertiary enrollment:

- Brazil has the **highest share of graduates in private institutions among tertiary graduates** among OECD countries
- 81% of enrollments are in the private sector
- OECD average: 37%

Figure B4.1. Share of graduates in public institutions among tertiary graduates, by level of education (2022)



Brazil's Educational Lag

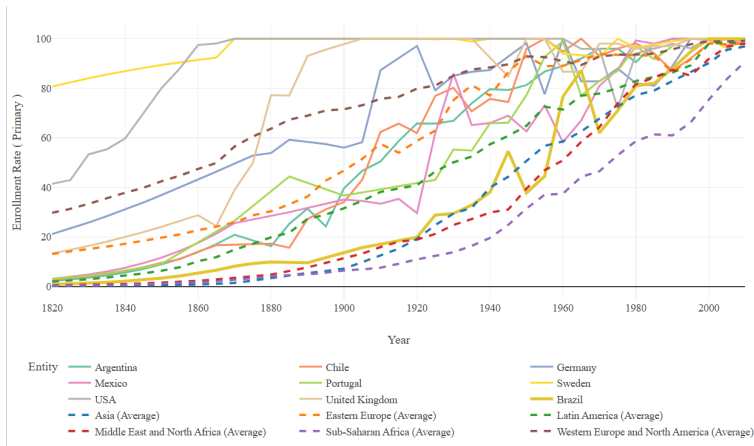


Figure 3: Primary Enrollment Rates for selected countries and the average of each major world region

Brazil's Educational Lag

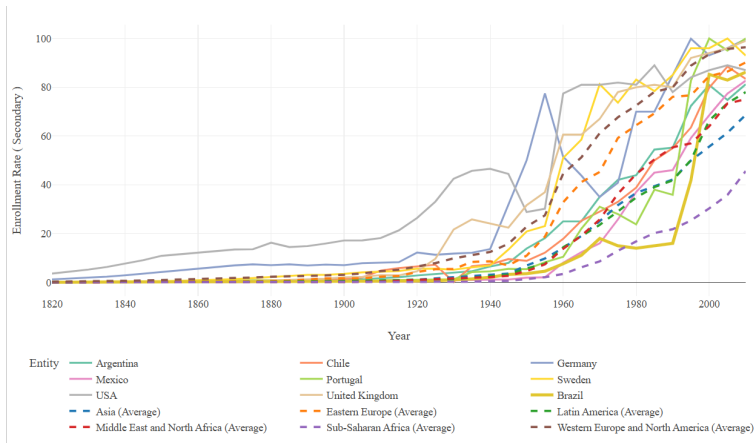


Figure 4: Secondary Enrollment Rates for selected countries and the average of each major world region

Brazil's Educational Lag

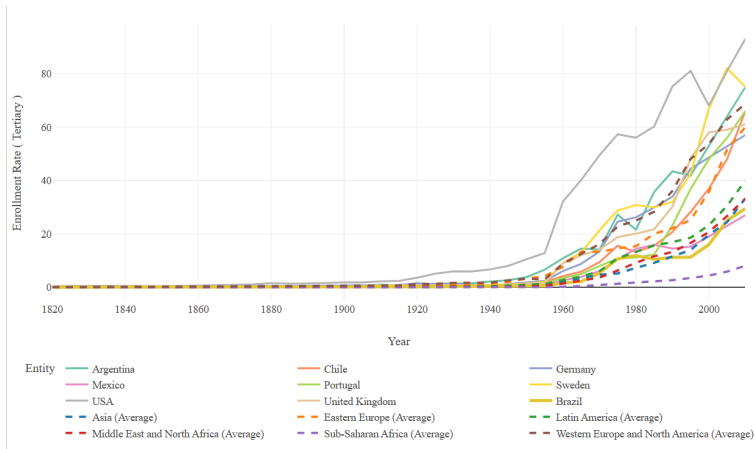


Figure 5: Tertiary Enrollment Rates for selected countries and the average of each major world region

Theoretical Framework

Analytical Approach:

- Historical institutionalism (Mahoney & Thelen)
- Comparative-historical analysis
- Gradual institutional change framework

Comparative Welfare State Analysis Applied to Education

- Drawing on Busemeyer (2014): Education regimes are related welfare state models
- “Worlds” framework from Esping-Andersen (1990):
 - **Social Democratic**: Universal, de-stratified (Sweden)
 - **Conservative-Corporatist**: Tracked, occupational (Germany)
 - **Liberal**: Market-based, commodified, residual protection (US/UK)

Section 2

Colonial Roots

Portuguese Colonial Legacy and the Hierarchical

Brazil “Born Old”: Inheriting Hierarchical Institutions (Barbosa 2018)

Institutional Features:

- Extreme land concentration
- Slavery (60% of Atlantic trade)
- Export-oriented monoculture
- Patrimonialism
- Extractive/Mercantilist political economy (Mahoney 2010)

Educational Consequences:

- Deliberate gatekeeping
- No universities (vs. Spanish America)
- Education as elite privilege
- Active blocking of mass access
- Education was used to block political rights

Comparative Context

Brazil vs. Spanish America

- **Spanish colonies:** Universities from 1538 (Santo Domingo, Lima, Mexico)
 - ~150,000 graduates 1772-1872
- **Brazil:** No universities until 1920
 - Only 1,242 Brazilians at Coimbra 1772-1872

Result: Brazil began 20th century with Portuguese *ancien régime-like* institutions

The Pombaline Reforms (1759)

Enlightened Despotism and Educational Collapse

Reforms:

- Jesuit expulsion (1759)
- Administrative centralization
- Economic reorganization

Consequences:

- Fragile educational structure collapsed
- No secular replacement
- Deliberate gatekeeping

Ribeiro Sanches' Logic:

Schools in small towns would teach peasants to read, causing rural exodus and threatening hierarchy

Educational Gatekeeping as Political Strategy

The Saraiva Law (1881)

- Electoral reform linking education to voting rights
- Prohibited illiterates from voting
- **Result:** Electorate collapsed from $>10\%$ to $<1\%$ of free population

No corresponding literacy expansion policy

→ Education used to legitimize exclusion, not enable participation

The Story by the numbers

Extreme Educational Lag

- **1872 Census:** 16.9% of free children (6-15) enrolled
 - Overall literacy: 15.5% (including enslaved)
 - 99.9% of enslaved people illiterate (prohibited from school)
- **1890 Census:** 17.6% literacy (5+ years old)
 - Minimal improvement despite 44% population growth
- **1920:** 20% enrollment (6-14 years)
 - Marginal gain over 50 years

Comparative Lag

Brazil vs. United States (1870)

United States:

- Free population literacy: 88.5%
- Enslaved population literacy: 20.1%

Brazil:

- Free population literacy: ~16%
- Enslaved population literacy: <0.1%

Brazil lagged even compared to other Latin American countries

Brazil's Educational Lag

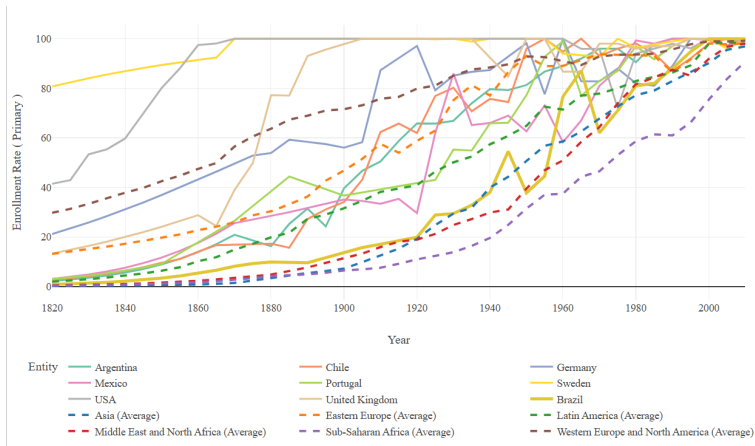


Figure 6: Primary Enrollment Rates for selected countries and the average of each major world region

Section 3

Vargas Era Reforms

The 1930 Rupture

Revolution of 1930: Partial Institutional Break

Political Changes:

- Coup led by Getúlio Vargas
- Challenged rural oligarchy hegemony
- Centralized power
- Industrialization project

Social Policy Model:

- Bismarckian inspiration
- Corporatist logic
- “Regulated citizenship” (Santos 1994)
- Urban workers incorporated
- Rural workers excluded
- Division between *insiders* and *outsiders*

Regulated Citizenship

Corporatist Social Protection

- Rights based on **occupational categories**, not universal citizenship
- Insider/outsider division:
 - **Insiders:** Urban, formal sector, regulated professions
 - **Outsiders:** Rural workers, informal sector

Vargas's Logic (1932 speech):

"Transform the proletariat into an organic force of cooperation with the State... guarantee capital by extending rights to labor"

Educational Reform: Tracking Introduced

Francisco Campos Reform (1931-1932)

Institutional Changes:

- Ministry of Education created (1930)
- National guidelines for states
- Federal centralization

Result: State-led stratification institutionalized

Two-Track System:

- 1 **Academic track:** Elite pathway to university (Law, Medicine, Engineering)
- 2 **Vocational track:** Commercial education, terminal cycles, no university access

Estado Novo: Radicalization (1937-1945)

Gustavo Capanema's Educational Policy

Four vocational branches established:

- ① Industrial
- ② Commercial
- ③ Agricultural
- ④ Teacher training

Plus: Academic secondary track (elite pathway)

Logic: Formation of capable elite + industrial workforce for accelerating industrialization

The S System: Practical Training

SENAI (1942) and the Birth of the S System

Institutional Design:

- Private management
- Public financing (payroll tax)
- Multi-stakeholder governance
- Firm-based apprenticeship

Teutonic Influence:

- German vocational traditions
- *Auslandsdeutsche* (Roberto Mange)
- Adapted to Latin American context
- Lower apprenticeship volumes than Europe

The “S&I Formula”: Distinctive Latin American VET model (Schrank 2025)

Tertiary Education: Importing the Humboldtian Model

From Professional Schools to Research Universities

- **1920:** University of Rio de Janeiro (nominal merger of professional schools)
- **1934:** University of São Paulo (USP)
 - New Faculty of Philosophy, Sciences, and Letters (FFCL)
 - European professors recruited (France, Germany, Italy)
 - Humboldtian model: Teaching + Research integration
 - Research becomes primary function

But: Traditional professional schools (Law, Medicine) resisted integration

Limited Impact: Elite Institutions

Tertiary Education Remained Minuscule

- Until 1960s: <1% of Brazilians had any tertiary education
- Extremely elitist institutions
- Regional concentration (Southeast)

Layering, Not Displacement:

- FFCLs added new institutional layer
- Traditional professional schools continued largely unchanged
- Hybrid university model emerged

Section 4

Military Dictatorship

Context: Military Dictatorship (1964-1985)

Political-Economic Orientation:

- Anti-communist regime
- Developmentalist ambitions
- Rapid industrialization
- Intense repression
- U.S. influence and Cold War alignment

“Economic Miracle” (late 1960s-early 1970s):

- High growth rates
- Urbanization acceleration
- Middle class expansion
- Followed by: oil shocks, debt crisis, stagnation

Policy Diffusion: MEC-USAID Agreements

1965-1968: Transfer of American Educational Models

Twelve agreements signed between MEC and USAID:

- Technical and financial support
- Part of Alliance for Progress (Cold War strategy)
- Restructure education at all levels
- Rationalized, efficiency-oriented administration
- U.S. governance structures

Key shift: From Continental European to Anglo-American model

The 1968 University Reform

Dismantling the European Model

Institutional Changes:

- End of *cátedra* (chair) system
- Departmental organization
- Credit systems (vs. rigid curricula)
- Specialized research faculties
- FFCL dismantled

U.S. Influence:

- Administrative rationalization
- Efficiency metrics
- Managerial governance
- Research productivity emphasis

End of Formal Tracking

Major Structural Change:

- Formal vocational/academic tracking system abolished
- Work-oriented training integrated in the public system (under funded due to economic crisis)
- Private schools could keep academic training

But: Inequality mechanisms didn't disappear—they transformed

→ From **state-coordinated stratification** to **market-led dualization**

Strategic Dualization: The Political Calculation

Oliven's Argument: Military regime pursued **dual strategy** (Oliven 2002)

Public Sector:

- Continued investment in research
- Graduate education expansion
- Techno-scientific apparatus
- **But:** Universities = opposition nuclei
- Solution: Persecution, expulsion of oppositionists

Private Sector:

- Liberalization and rapid expansion
- Isolated colleges (*faculdades isoladas*)
- Teaching-focused, not research
- Less space for organized opposition
- Absorbed enrollment demand

Convenient for the regime: Expand access while containing political opposition

First Tertiary Education Boom

Explosive Growth: 100,000 → 1+ million (early 1960s to mid-1970s)

Drivers:

- Economic miracle
- Middle class expansion
- Urban migration
- Demand for credentials

Character:

- Predominantly private
- Low-quality private teaching institutions
- High-quality public research universities
- Inverse public/private stratification established