

The Four Worlds of Brazilian Educational Reform

A Comparative-Historical Analysis

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Section 1

Research Problem

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
- It doesn't fit in the commonly defined regime categories made for the OECD countries

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

Theoretical Framework

Regime	Core Logic	Example
Social Democratic	Universal, de-stratified	Sweden
Conservative	Tracked, occupational	Germany
Liberal	Market-based, commodified	US/UK
Hierarchical	Elite gatekeeping	Brazil until 1930

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 (*insiders vs. outsiders*)
 - ② **Commodification** of educational provision (*State vs. market provision*)
 - ③ **Stratification** through state regulations (*Formal tracking exists?*)

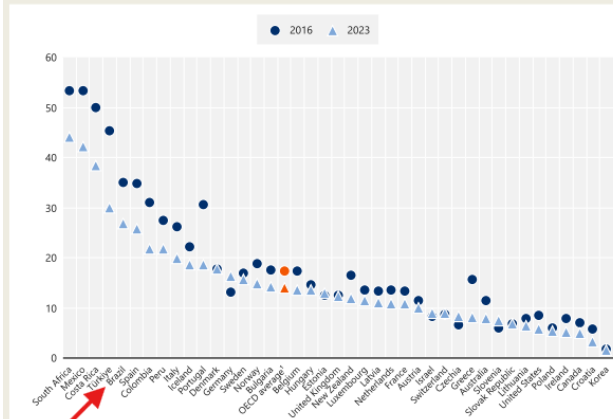
Brazil's Educational Position in OECD Context

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

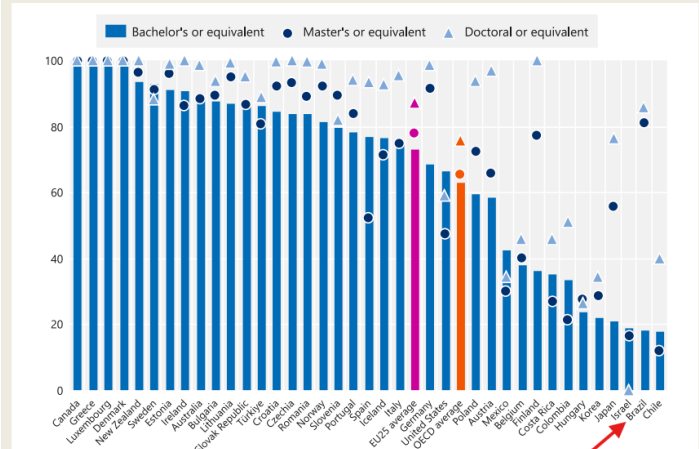


Brazil's Educational Position in OECD Context

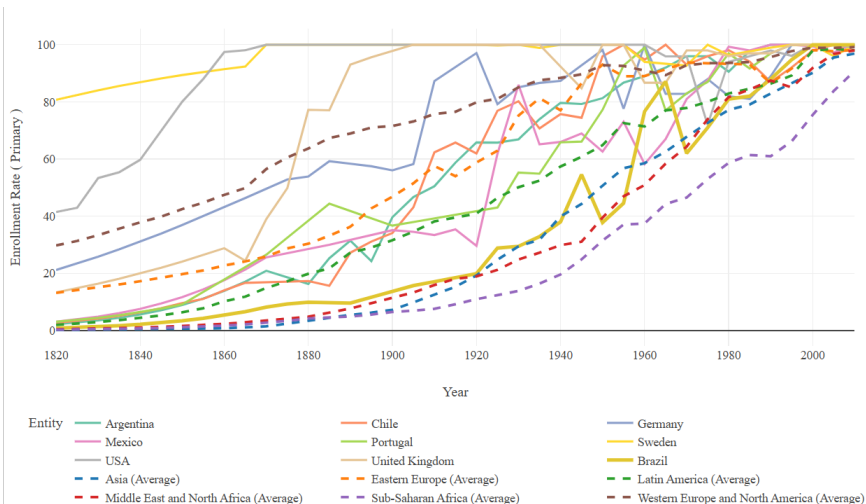
Extreme commodification of tertiary enrollment:

- 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)



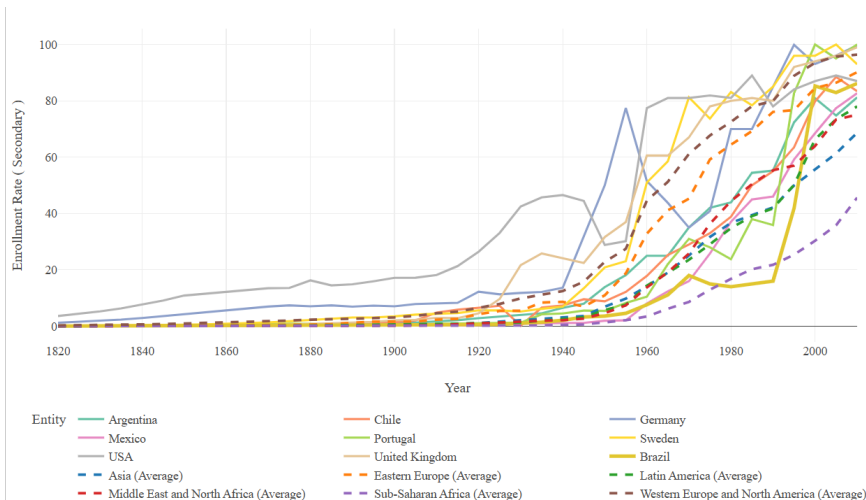
Primary Enrollment Rates for selected countries and major world regions



Primary Enrollment Rates for selected countries and major world regions

- Brazil's lag was already documented in the 19th century
- Primary school enrollments only consistently caught up in the **1990s** when universalized

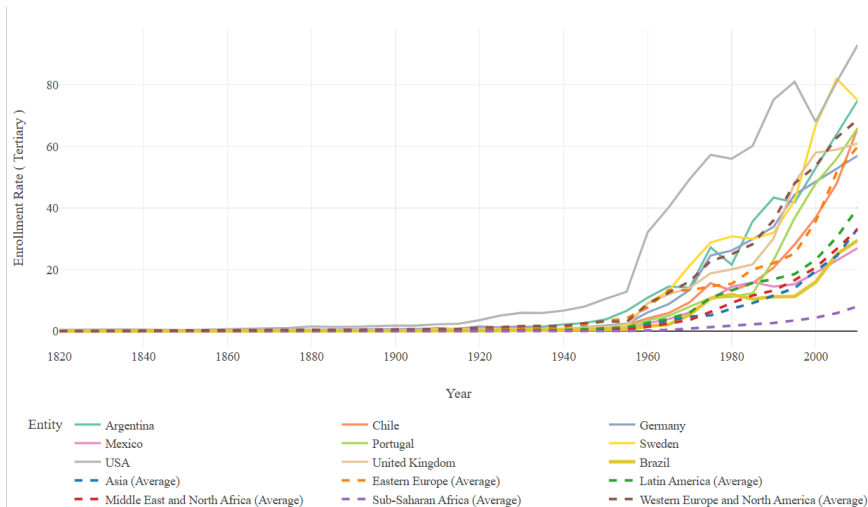
Secondary Enrollment Rates for selected countries and major world regions



Secondary Enrollment Rates for selected countries and major world regions

- Secondary education even more restricted
- Lag gap was **extreme in the 1980s** (economic crisis + ISI fiscal consequences during dictatorship end)
- **Fast catch-up from 1990s onwards**
- Brazil now has better enrollment than LA average

Tertiary Enrollment Rates for selected countries and major world regions



Tertiary

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)

Main Argument (Preview)

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.*

- Four successive "worlds" of Brazilian educational reform:
 - ① Hierarchical reforms (colonial era–1930)
 - ② Conservative-corporatist reforms (1930s–1960s)
 - ③ Liberal reforms (1960s–1980s)
 - ④ Social-democratic reforms (post-1988)
- Each adds a layer; none fully displaces previous ones
- This layered hybrid explains Brazil's current inequality/expansion configuration

Section 2

Colonial era to 1930s

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

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

- The Portuguese had distinct elites preferences when compared with German, American or Nordic elites

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

Section 3

Conservative-Corporatist Reforms (1930s–1960s)

Vargas Era Reforms

- Conservative nation-building and industrialization
- Social policy:
 - Bismarck-style occupational social insurance
 - “regulated citizenship”: insiders vs. outsiders
- Education:
 - creation of MEC; national guidelines
 - introduction and radicalization of tracking (academic vs. vocational/VET)
 - SENAI/SENAC and *Sistema S* as corporatist VET
- Slow expansion; strong stratification by track and occupation

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

Two-Track System:

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

Result: State-led stratification institutionalized with deep *insider-outsider* division

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

Liberal layering? (1960s–1980s)

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

Tertiary education growth

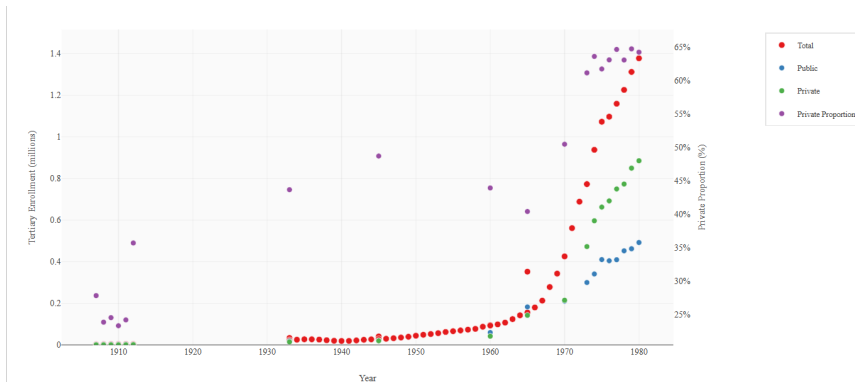


Figure 5: Number of tertiary enrollments discriminated by public and private institutions (1907-1980)

The Secondary Education Crisis

Brazil Falls Behind

- Secondary enrollment remained extremely low
- Brazil fell below sub-Saharan African averages (Lee and Lee 2016)
- Reflected priorities?: Elite tertiary > mass secondary
- Bottleneck for educational attainment

The “lost decade” (1980s):

- Economic crisis and stagnation
- Educational expansion stagnates
- Fiscal crisis at state level (Kang, Menetrier, and Comim 2024)

Section 5

Redemocratization

The 1988 Constitution: Education as Right

Redemocratization and Social Rights

Constitutional Framework:

- Education as fundamental right
- Duty of State and family
- Universal access mandated
- Free and compulsory basic education

Universalist orientation: Health, education, pensions, social rights

Incremental Implementation

Not Rupture, but Layering (Arretche 2019)

- Constitutional principles vs. implementation constraints
- National systems gradually constructed
- PSDB governments (center-right): Foundations
- PT governments (center-left): Deepening
- Budget constraints and inherited institutional arrangements limit pace

Political coalitions: Progressive elements within broader coalitions advance universalist agenda

Secondary Education Catch-Up

Remarkable Expansion (1990s–2010s)

Starting Point (late 1980s):

- Below sub-Saharan African average
- Lagged all world regions

By 2010:

- Surpassed Latin American average
- One of fastest regional expansions
- Universalization of primary → demographic pressure for secondary

Second Tertiary Boom: Private Explosion

Late 1990s - 2000s: Private Sector Expansion

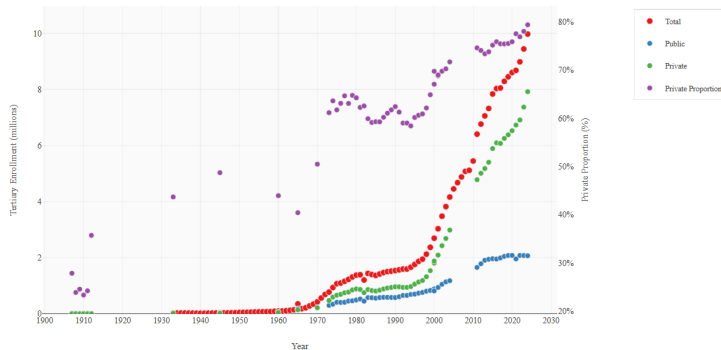
- Lower per-student costs
- Flexibility to open campuses quickly
- Market responsiveness
- Profit-driven expansion

Third Boom (2010s): Distance Learning hegemony

- EaD (*Educação a Distância*) explosion
- Overwhelmingly private sector
- Massive scale economies
- Regional penetration

Result: Brazil reaches ~80% private enrollment (tertiary)

Second Tertiary Boom: Private Explosion



Section 6

Conclusion

Gradual Institutional Change

Each regime added layers:

- ① Hierarchical foundations (colonial)
- ② Corporatist tracking (1930s)
- ③ Liberal privatization (1960s)
- ④ Social-democratic universalism (1988+)

Result:

- Hybrid configuration
- Institutions designed for contradictory goals
- Path dependence from earlier choices
- Constraints on equalizing reforms

Theoretical Contributions

Brazil Illuminates:

- ① **Path dependence matters:** Colonial institutions shaped trajectories for centuries
- ② **Gradual change mechanisms:** Layering, drift, displacement create hybrids
- ③ **Policy diffusion:** Teutonic, French, U.S. influences in distinct periods
- ④ **Welfare regime framework applies:** Educational regimes mirror welfare states
- ⑤ **Timing matters:** When universalization begins shapes inequality patterns
- ⑥ **Authoritarian expansion:** Indoctrination, not just democracy or economics

Contributions to Comparative Political Economy

- Substantive:
 - first long-run, regime-based account of Brazilian education
 - shows how hierarchical, corporatist, liberal, and social-democratic logics interact
- Theoretical:
 - extends education-as-welfare-regime framework to late-developing, hybrid cases
 - shows importance of layering and hybridization rather than clean regime types
- Methodological:
 - leverages long-run data and comparative-historical analysis
 - bridges literatures on colonial legacies, welfare states, and skill formation

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