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University Investments as National Development Strategy: The Brazilian Case

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ABSTRACT: *This study examines the growth of the Brazilian federal university system under the aggressive expansion program initiated during the first two decades of this century. Specifically, it assesses the impact of these changes on the capacity of Brazilian federal universities to meet the government's stated policy intentions regarding post-secondary expansion, particularly with respect to national development. Through examination of events subsequent to the years of PT rule, it also considers the implications of a dramatic policy reversal in support for post-secondary education instigated by President Jair Bolsonaro during his 2018-2022 tenure.*

Key words*: Brazil, Development, Post-secondary, Universities.*

1. Introduction

The role of post-secondary institutions in supporting national development goals in the Global South has been a subject of considerable scrutiny over the years, through studies at the macro-level and case studies alike. Overall, there is considerable agreement that when directed appropriately, investment in tertiary education is critical to a nation's development ambitions, primarily due to its effects in providing direct employment, engaging in advanced training, stimulating creativity, encouraging economic growth, and promoting innovative solutions to national challenges.

Brazil provides an interesting case in point. Since the 1960s, the country has invested significantly in post-secondary education, both private and public, resulting in unprecedented expansion of the country's network of universities and other advanced educational facilities. Such growth was further accelerated at the beginning of the 21st century, with major investments undertaken in the federal university system following the election of President Luiz (Lula) Inácio da Silva of the Partido dos Trabalhadores (PT) and the introduction of legislation designed to reinforce the link between post-secondary education and development.

This article examines the growth of the Brazilian federal university system in the context of these ambitions, with an eye to evaluating its impact on the country's national development prospects during the Lula PT government and its successor under President Dilma Roussef. Through examination of events subsequent to the years of PT rule, it also attempts to assess the implications of the dramatic policy reversal in support for post-secondary education instigated by President Jair Bolsonaro during his 2018-2022 tenure. It concludes with an assessment of a likely return to federal prioritization of the system in the years ahead as Lula returns to power as Brazil's president.

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2. Background

Within the literature, observers have for some time now emphasized the role of post-secondary institutions in promoting both social and economic development, both nationally and within regions. According for example to Smith and Bagchi-Sen (2012), universities have frequently been envisioned by governments as strongly incentivizing economic growth. Fonseca and Nieth (2021) refer in fact to post-secondary institutions as "triggers" for development, given their unique potential for development of new knowledge and support for innovative practices. Thomas and Pugh (2020) point to universities' role in acting more broadly as agents of positive change, helping to solve pressing social issues associated with imbalances in unemployment and access to income. In addition, the role of tertiary education in promoting development has formed a critical core in the pronouncements linked to organizations such as the OECD (Organization for Economic Cooperation and Development), which has pointed to the role of universities in supporting skills and labour upgrading, research, and the coordination of innovation networks, both nationally and internationally (Arbo and Benneworth, 2007; see also Benneworth and Fitjar, 2019).

As Altbach (2007) points out, however, it is not just the university, but a particular type of university that has the most impact on change in development terms. Specifically, he refers to the unique role of the "research" university" as a central institution of the 21st century in this regard. Research universities, according to Altbach (2007: 112), are focused on excellence and exclusively positioned to deliver on key ingredients required for fundamental positive change in developing areas. These include: 1) the preparation of next generation personnel for technological and intellectual leadership; 2) the provision of new knowledge for science and innovation; and 3) the development of key connections to the global network of top research communities in the most advanced economies. Given their comprehensive role, the need for full-time teaching and research staff, and maintenance of research facilities, typically such institutions are resource intensive, and for this reason operate almost exclusively in the public domain. In addition, they tend to work best in highly differentiated post-secondary systems offering students a variety of opportunities outside of the more limited range that can be accommodated in the research universities limited enrolment context (Altbach, 2007: 115, 119, 127).

At the same time, while well suited to development ends, given the investments required to maintain high-end public research universities, few countries in the Global South are in a position to ensure their effective presence. A notable exception to this is Brazil, a large middle-income country with a highly differentiated post-secondary system which in recent years has made serious efforts to expand its network of federally funded universities across all regions of the country.

To be sure, the broader national system itself was not created overnight. Following Brazil's 1822 declaration of independence from Portugal, its tertiary education evolved quite slowly, with an incipient focus during the 19th century on training in professions, such as medicine, engineering, and law (Nader, 2016; Steiner, 2007). By the middle of the 20th century, the country possessed only 19 universities, nine federally funded, two supported by Brazilian state governments, and eight by religious organizations, such as the Roman Catholic Church (see Nader, 2016; Steiner, 2007).

Following the collapse of Brazil's democratically elected government and the consolidation of a military dictatorship in 1964, the federal government focused its efforts squarely on economic growth and national development. A key element of this strategy was an expansion of the post-secondary system, primarily through the establishment of laws allowing for the creation of new and alternative forms of post-secondary education. These included not only smaller, more focused "faculdades" (Faculties), but also larger numbers of private training institutions and universities (Souza et al., 2019). Coupled with growing student demand, these policies resulted in the increase of student numbers from 425,000 to over a million over five years between 1970 and 1975 alone.

With the return of democracy in 1988, such expansion continued slowly, but received major impetus once again following 1996 with the passage of the "Lei de Diretrizes e Bases da Educação Nacional" (Law of Directives and Bases of National Education), which allowed for further diversification and the creation of new forms of post-secondary training, such as "Centros Universitarios" (University Centres) and "Centros de Educacão Tecnologica" (Centres of Technological Training). In addition, the law clearly laid out federal responsibilities for maintenance and support of publicly funded tertiary education (Souza et al., 2019). The net result was that by 2019, Brazil had established or approved nearly 2,600 post-secondary institutions, with an enrolment of over 8.5 million students (MEC, 2019a). Within the system, some 200 post-secondary

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institutions have been accredited by the Ministério da Educação or MEC (Ministry of Education) as universities, which are by definition engaged in teaching and research. Of these, just under half are privately-funded institutions charging tuition. These include both for-profit private institutions, and faith-based or community not-for-profits. The balance comprises tuition-free public universities, supported principally by either federal or state governments, and allowing entry following rigorous student performance or aptitude exams.

The express link between post-secondary education and development in Brazil was validated and reinforced as early as 2001, through the 10-year "Plano Nacional de Educação" (National Education Plan). In addition to measures to modernize the country's education system, it was unequivocal regarding the need for a strong, publicly supported tertiary sector to support Brazilian development. "No country," the Plan stated, "can aspire to being developed and independent without a strong system of higher education... In order for them [institutions of higher education] to achieve their educational, institutional and social mission, public support is decisive" (Chaves, 2012). This theme was enthusiastically embraced by the newly elected government of Lula in 2003, as part of a broad platform presented by the PT to bring social justice and prosperity to Brazilians, particularly those on the margins of society. As Lula proclaimed in 2004 early in his mandate:

> Brazil has the challenge of elevating the quality of its education running against time. Knowledge is the decisive factor for social and economic development and affirming the sovereignty of nations. How many excellent professionals does Brazil lack because they did not have access to education? ('Mensagem', 2004).

In the years following, Lula's government (2003-2010), and its successor, that of Dilma Roussef (2011-2016), undertook major efforts to expand educational access at all levels (see Lima et al., 2023; Neto & De Nez, 2021). By 2016, over 2400 post-secondary institutions of all types were operating in Brazil, almost double the number posted for the year 2000. Total enrolment had reached over 8 million, half of which was resident in some 200 accredited universities in both the public private system (MEC, 2017).

Particularly noteworthy were the investments made in the federally funded university system—significant not only for their effects on enrolment expansion, but also for research capacity and the potential for socioeconomic innovation and growth in Brazil (see Aguilar & França, 2020; Coimbra et al., 2021). Such efforts directed at installing a sizable network of premier research institutions within Brazil's highly diverse post-secondary system were notable, particularly given Altbach's (2007) assessment of both the paucity—and the benefits—of such systems in the developing world.

In the sections which follow, we endeavour to examine and assess the extent and scope of these efforts, and more specifically their impact during the years of the Lula-Dilma presidencies. As will be shown, under the two successive PT governments, the post-secondary system—and particularly Brazil's network of federal universities—underwent transformative expansion and change in a number of respects. In some measure however, quantitative growth did not necessarily equate with overall improvements in quality, thus limiting potential impact on Brazil's national development ambitions (Bisinoto & Almeida, 2017; Borges & Aquino, 2012). We conclude with an assessment of the longer-term legacy of such changes, especially given the more recent directions in governance in Brazil.

3. Data Sources and Methods

The data that inform this study were collected from a number of sources. Information on the parameters of the post-secondary educational system, post-secondary institutions, faculty and students were derived from databases and reports developed and published by Brazil's MEC. These data are located in a number of repositories and are available publicly through websites as cited in the text.

Additional information regarding the scope and quality of Brazilian secondary institutions was obtained through the "Ranking Universitário Folha" (RUF), an annual ranking exercise undertaken by Brazil's influential "Folha de São Paulo" newspaper. These rankings are based upon dozens of variables linked to institutional performance and secured by the RUF through publicly available data and institutionally derived questionnaire responses (De Ávila Soares, 2022). The RUF database was accessed and analyzed by written permission provided to the author by the "Folha de São Paulo". The methodology employed by the RUF in determining its ranking and related scores is described in detail at RUF (2019).

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Information on government laws, policies, and funding allocated to federally supported institutions were sourced directly from the Government of Brazil or its departments and agencies though their database websites. Commentary and response to these policies are also cited in the text and were obtained through web searches of academic and popular media articles on specific policy topics.

Analysis of quantitative data obtained from repositories maintained through the MEC or the RUF was undertaken exclusively by the author using SPSSx. Care was taken at all points to ensure accuracy of transcription and data manipulation. Any errors or omissions in the data or its presentation rest, however, solely with the authors.

4. Results

Following the Lula government's social justice agenda, a number of measures were introduced to enhance access to post-secondary education in Brazil with a primary focus on social inclusion and the democratization of the system (see Lima et al, 2023). At the level of post-secondary institutions, university enrolments received a significant boost through the introduction in 2004 of PROUNI ('Programa Universidade para Todos'—University for All Program). PROUNI built further on a student financing program introduced in 2001 known as FIES ('Fundo de Financiamento Estudantil'—Fund for Student Financing), and was designed to provide tuition subsidies for students seeking accreditation through private post-secondary institutions ('Oportunidades de Acesso', 2024). Parallel investments were also made in the public sector. Under the banner of the federal "Programa de Apoio a Planos de Reestructuração e Expansão das Universidades Federais" (Financial Support Program for the Expansion and Restructuring of Federal Universities - REUNI) formalized in 2007 ('O que é o REUNI', 2010), new and unprecedented investments were specifically targeted to forge an expansion of Brazil's publicly funded network of federal universities (see Moro & Gisi, 2023). Public data from Brazil's Federal Budget reveal the dramatic extent of this increase.

Table 1. Evolution of the Annual Budget Allocated to Federal Universities, 2000 – 2023 (in R$).

Year	Annual Appropriation	Actual Expenditure
2000	6,441,314,435	6,696,619,131
2001	6,894,749,927	6,931,381,452
2002	7,381,282,337	8,042,791,297
2003	8,469,651,288	8,791,837,939
2004	9,316,002,304	10,399,634,097
2005	11,439,684,720	10,723,064,764
2006	12,305,755,052	13,516,778,746
2007	14,890,592,133	14,453,164,220
2008	15,337,612,026	16,666,667,748
2009	16,983,669,115	19,881,573,642
2010	21,426,075,337	23,897,164,357
2011	25,734,658,642	26,734,937,497
2012	29,766,428,881	28,658,416,630
2013	31,209,125,271	33,133,095,349
2014	36,596,166,730	37,314,558,939
2015	41,406,626,712	40,745,085,048
2016	44,485,629,669	44,442,296,274
2017	48,326,325,827	48,622,301,389
2018	49,814,620,839	47,413,826,984
2019	52,880,683,400	49,391,723,222
2020	46,877,443,420	49,731,809,154
2021	33,000,046,937	50,222,861,311
2022	56,514,512,811	51,770,912,671
2023	57,043,768,919	55,187,376,176

Source: (SIOP, 2000-2023).

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In 2001, just prior to the start of the Lula government, allocations to federal universities amounted to R$ 6,894,749,927. Towards the end of Lula's term, in 2010, this had increased three-fold, to R$21,426,075,337—an amount 60 percent higher than would have been expected had increases simply followed Brazil's cost of living index. Between 2010 and 2018, just following the end of the Dilma government, contributions had increased to R$ 49,814,620,839 annually, a jump of more than 100 percent, and over 40 percent higher than the rate of inflation (SIOP, 2001; 2010; 2018).

These investments literally transformed the face of the Brazilian federal university system. In 2001, federal universities numbered just 39, with a total enrolment of some 471,989 undergraduates. This represented approximately 25 percent of all students enrolled in universities in Brazil, and 58 percent of students attending public universities in the country. By 2019, the number of federal universities had increased to 63. Enrolment, moreover, had more than doubled to 1,048,837, representing at this point 34 percent of all university undergraduates enrolled, and 66 percent of all students enrolled in the public system (MEC, 2001; 2019).

Such dramatic growth and enhanced presence in the broader system was accompanied by far broader geographic distribution within the Brazilian federation, greatly enhancing access to students outside major urban centres (Macedo et al., 2005; Neto & De Nez, 2021). Where, for example, in 2001, only 12 of 39 federal universities were located outside the national and 26 state capitals, by 2019, this increased to over half, at 32. These accounted moreover, for over half of all enrollees in the system, compared to 32 percent in 2001 (MEC, 2019a).

These changes also contributed to qualitative enhancements across the system that helped to more firmly establish the federal network as Brazil's premier research institutions, clearly possessing many of the attributes seen by Altbach (2007) as a necessary requirement to attain this status. Table 2 provides a summary of changes occurring in the qualifications and activity of federal university faculty in Brazil, as federal institutions moved to invest the significant new funding they were accorded during the Lula and Dilma regimes.

Table 2. Changing Characteristics of the Federal University Professoriate, 2001-2019*.

	2001		2010		2019	
	N	**%**	**N**	**%**	**N**	**%**
Female	67,957	43	88,503	45	100,277	47
Doctoral degree	39,294	26	80,984	41	129,947	61
Under 45	87,817	56	99,270	51	101759	48
Full-time	79,293	53	120,432	62	148,251	73
Engaged in Undergraduate teaching			172,362	94	193,850	95
Engaged in Graduate level teaching			33,264	17	48,964	24
Engaged in distance education			6,243	3	12,137	6
Engaged in Research			62,054	34	88,633	44
Engaged researchers with funding			11,094	18	13540	15

Note: *% of valid responses
Source: MEC (2001, 2010, 2019b).

From 2001 to 2019, the total number of faculty at Brazilian federal universities increased from 149,126 to 213,167, or some 43 percent. Notably, the proportion of female faculty within the professoriate increased as well, from 43 to 47 percent. Full-time employment increased markedly from 53 percent in 2001 to nearly three-quarters in 2019, as did professional qualifications. Where in 2001, only 26 percent of faculty in federal universities possessed an earned doctoral degree, this increased to 61 percent in 2019. Not surprising, this was linked to increases in key activities associated with the advanced research university: engagement in graduate teaching and research. Where fewer than one in five faculty members were involved in graduate teaching in 2001, by 2019 this increased to one in four. Similarly, the percentage of faculty actively engaged in research increased from 34 to 44 percent of all faculty. This appears, however, to have placed pressure on available research funding, as the percentage of active researchers who managed to secure funding actually fell from 18 percent in 2010, to 15 percent in 2019.

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In terms of the impact of these changes, university rankings data provided through the RUF demonstrate the changes in federal university standing relative to other types of institutions across a number of dimensions. Here we examined ranking results for all universities between 2012 (the first year the RUF reports were published), and 2018 (the year before the inauguration of the Jair Bolsonaro regime). For both 2012 and 2018, universities were assigned overall quality scores out of 100, based upon the results of a series of performance variables. For the 2012 assessment exercise, 55 points were assigned to research performance, measured by an assortment of nine indicators, including total and per capita publication and citation counts, productivity as assessed by national research funders, and graduate theses supervised. Twenty points were given to quality of teaching, as determined by a national faculty survey, and another 20 to market presence, as determined by a national survey of human resources professionals. 5 points were assigned to innovation, as calculated by patent submissions. The 2018 survey saw a slight shift in weighting to 42 points for research, 32 for teaching, 18 for market presence, and 4 for innovation. In addition, new measures were introduced to assess teaching, including the percentage of full-time faculty and those with Ph.Ds (Orsolin et al., 2023). The innovation score was adjusted as well to include not just patents but contracts with industry. Finally, a score for internationalization was included, as measured by internationally co-authored publications per faculty member, and international citations per capita (RUF, 2012;2018).

Table 3 presents the total scores for the basic university types, along with the subscores for research and innovation respectively, presented as percentage grades. Overall, total scores for all types of institutions increased measurably, with federal institutions maintaining a fairly large lead between 2012 and 2018. Research scores were more stable, while at the same time demonstrating the clear leadership role of federal universities in this domain. In terms of innovation, federal universities also maintained a significant lead, increasing scores from 47 to 54.5 between the two years. Notably, however, innovation scores for other public post-secondary institutions (primarily state-run), and private institutions were approximately doubled—perhaps due to the inclusion in 2018 of broader measures linked to industry joint-projects. Internationalization scores for 2018 only (not shown in the table) were dominated by federal institutions, with an average score of 63.5, as compared to 41.3 for other public universities, and 44.5 for private post-secondary institutions.

Table 3. Evolution in University Ranking Scores in Brazil, 2012 to 2018*.

Ranking Criterion	**2012**	**2018**
Overall quality		
Federal	50.19	63.25
Other Public	32.11	44.66
Private	24.47	40.38
All institutions	33.64	48.69
Research		
Federal	70.76	68.40
Other Public	44.91	45.93
Private	34.23	35.83
All institutions	47.21	47.61
Innovation		
Federal	47.00	54.50
Other Public	22.40	39.00
Private	14.00	28.00
All institutions	25.40	39.00

Note: *All scores out of 100.
Source: RUF (2012, 2018).

5. Discussion

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The changes directly promoted by increased public funding to federal universities in Brazil had a significant impact on the size, scope and academic weight of these institutions, both in real terms and compared to other institutions. At the same time, university quality rankings undertaken at the mid-point, and then towards the end of the Lula-Dilma regimes reveal only modest improvements in academic outputs, in the form of research productivity and innovation, both largely commensurate with improvements posted by other public and by private institutions (Bisinoto & Almeida, 2017).

Such findings are in keeping with recent criticisms of the performance of the Lula and subsequent PT governments concerning their efforts at system expansion. Sguissardi (2015), for example, has been critical of government measures to support students attending private universities through tuition subsidies, arguing that this has in effect diverted resources away from public education that might otherwise be used to further strengthen the federal university network. Guerra and de Souza (2020) have argued strongly that Brazil was not adequately prepared for system expansion, suggesting that the quality of education has suffered as a result. Observers such as Soares (2022), Cavalcanti and Guerra (2022) have pointed to erroneous assumptions, reinforced by performance measurement tools, that equate quantity to quality, while other observers have noted similarly that that system expansion—in the form of increased number and qualification of professors, publication counts, and research grants—do not in and of themselves imply improvements in quality, particularly in an expanded system not adequately supported by ongoing resources (Moro and Gisi, 2023; Patrus et al., 2018).

The challenges facing an expanded system, as articulated above, could only have been exacerbated following the election of the Bolsonaro government. Almost immediately, efforts were undertaken to direct federal public institutions toward greater self-sufficiency, through a proposed policy plan dubbed "Future-se" (Moving Forward), presented for public discussion and input as early as 2019. Under the plan, the distribution of funds to federal universities would be recalibrated according to performance indicators linked to quality of governance, innovative practices, employability of graduates and other outcome variables. In addition, they would be asked to seek other sources of funding to supplement public transfers, in the form of user fees or donations ('MEC estuda', 2019).

Even as these measures were being discussed, the Bolsonaro government moved to impose a 30 percent cut in funding, initially to three federal universities, on the grounds that they had moved away from their academic mission towards "ideological causes", in the words of the then Education Minister ('MEC estende', 2019). This cut was later extended to all federal universities, although the full consequences of this move were not felt until two years later (Da Silva Geraldo, 2023). In the 2021 Federal budget, total allocations to all federal universities were set at R$33B, a decrease of approximately 30 percent from the R$46.8B earmarked for 2020. But while announced, such dramatic reductions did not in the end materialize. The actual amount transferred in 2021 by the federal government amounted to R$50B. In 2022, this increased marginally to R$56.5B (SIOP, 2021; 2023).

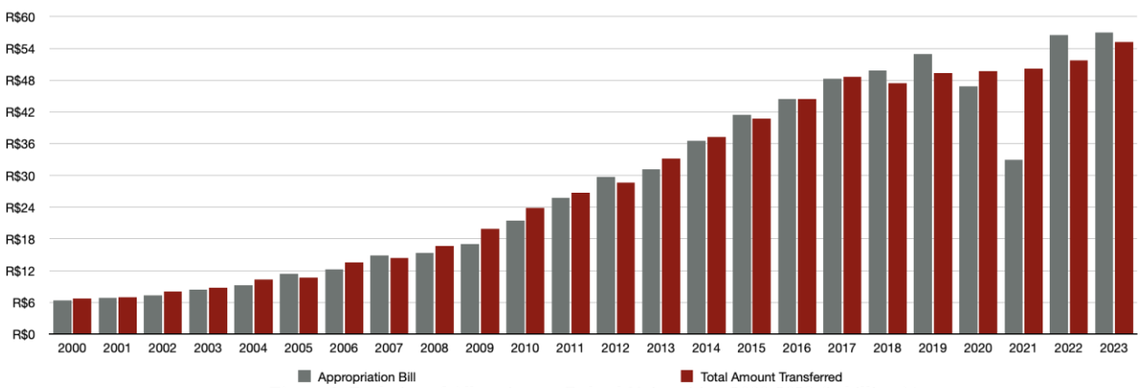


Figure 1. Evolution of Allocations to Federal Universities, 2000-2023 (in billions)*

Source: SIOP (2000 to 2023).

Still more drastic cuts were executed to the federal government's main funding agencies supporting research and graduate studies. With respect to the former, during the final year of the Dilma regime in 2018, the

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budget for the "Conselho de Desenvolvimento de Ciência e Tecnologia" or CNPq (Council for the Development of Science and Technology) had reached a record R$1.4B. In Bolsonaro's 2021 budget, this was cut by nearly two thirds to R$539M, provoking general outcries in the academic science and research communities. Much of this was reversed in actual transfers in 2021, to R$1.25B, still below the 2018 amount. The "Coordenação de Aperfeiçoamento de Pessoal de Nível Superior" or Capes (Coordination for Superior Level Training), the agency funding graduate studies, had its budget cut from R$4B levels prior to 2019, to R$1.89B in 2021, seriously reducing the number of graduate fellowships and bursaries available to students. This was restored through actual transfers to approximately R$3.39B, where it largely remained until the end of Bolsonaro's term.

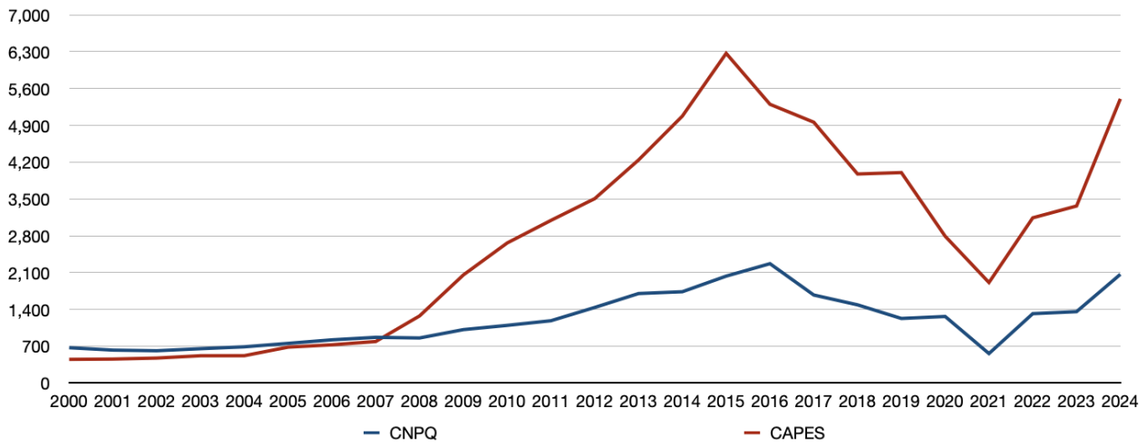


Table2. Total Amount Allocated to Research Funding Agencies – CNPq and CAPES (in R$M)*
Source: SIOP (2000 to 2024).

With the return of President Lula in 2023, there has been a clear shift towards restoring investments in public education, including post-secondary training. The federal budget in 2023 proposed a modest increase in support for federal universities, to just over R$52B. CNPq's budget was increased to $1.9B, and funding for graduate students under Capes to a record R$5.5B. Still and all, for the first time in over two decades, increased funding for universities fell 13 percent below the rate of inflation for the period between 2018 and 2023 (SIOP, 2000-2024).

As for the ultimate impact on university quality in accordance with the measures discussed above, detailed assessments are as yet unavailable. In addition to reducing funding available to federal universities and supporting research and training funds, the Bolsonaro government moved in 2021 to restrict collection and access to detailed demographic and performance data of the post-secondary sector, largely prohibiting detailed comparisons with years previous ('Sob risco', 2021). At present, only data from Folha de São Paulo's university rankings provide any clue as to how Brazil's federal universities have emerged from the Bolsonaro era.

In this regard, the trend may be telling. Between 2018 and 2023, the average overall quality score for Brazil's federal universities remained largely static, at approximately 63.3. The average research score actually dropped, from 68.4 in 2018, to 67.21 in 2023. At the same time, both scores actually increased for other, primarily state funded post-secondary institutions. In this cohort, the average overall quality score increased from 44.66 to 50.45 between 2018 and 2023. During the same period, the research score increased from 45.93 to 49.83.

Only further analysis in the coming years can provide better clues as to the ultimate impact of the funding tumult affecting federal universities in the years of the Bolsonaro government. What is clearer is the scope and impact of successive investments in the federal system during the Lula and Dilma governments, as measured by faculty qualifications, growth in graduate education, and time spent in research. The direct relationship between investment and impact provides at least prime facia evidence of what is possible when policy receives strong financial backing—and certainly what is easily reversed as a result of political change.

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