

have suffered a significant financial blow, leading to a willingness, on the part of their managements, to merge with one or more of their competitors. These mergers are reshaping the private higher education sector in Brazil, contributing to the formation of huge organizations that have proven to be very lucrative. In 2015, the Brazilian higher education for-profit sector registered a net income of around US\$14 billion. About 36 percent of this income came from 12 megaeducational groups that make up nearly 30 percent of the total market, with yearly profit rates that are above 21 percent. The country's private education sector is now the tenth largest component of the Brazilian economy. A recently announced merger between Kroton and Estácio de Sá will lead to the formation of the world's largest higher education institution, potentially enrolling more than two million students.

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**Seventy-five percent of these students are enrolled in private institutions and, perhaps even more significantly, approximately half of all private sector enrollees study at a for-profit institution.**

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#### THE NEW HIGHER EDUCATION GIANTS

The new education giants will destabilize the sector, creating companies significantly larger than many of their competitors and concentrating a great majority of the government's student loans in just a few institutions. Despite the claims that financial goals will never be given priority over social commitments, lessons from other sectors and from other parts of the world have shown that, in most cases, the appetite for short-term financial gain subsumes long-term educational objectives. This means that the notion of education as a public good is likely to be undermined in the name of rapid economic return.

To date, the quality of for-profit higher education in Brazil is highly dubious. For-profits tend to be ranked below other higher education institutions on official student learning indicators and also suffer from problems related to infrastructure, faculty qualifications, and financial sustainability. It is worth emphasizing that most of the students in for-profit institutions are enrolled in low-cost programs in the fields of law, pedagogy, administration, and humanities. These degree programs favor larger classrooms, low faculty salaries, reduced academic expectations, and the absence of

policies designed to minimize dropout rates. The quality of these programs is further jeopardized by excessively rapid growth that outpaces governmental efforts to maintain minimal standards through a complex national system for the evaluation of programs and institutions. The national assessment system does not address the for-profit phenomena in a specific fashion, being uniformly applied to all higher education offerings. Also, the government's evaluation process focuses on the performance of concluding students, rather than on the student body as a whole. Since many of the students in for-profit institutions never graduate, their omission from the evaluation process makes it more difficult to detect deficiencies. Although for-profit advocates argue that the sector has introduced better management, provided funds for greater physical infrastructure, and expanded higher education opportunities, these claims must be subjected to rigorous examination.

The trend toward for-profit growth in the higher education sector is clearly a cause for concern. The overall impact of the recently created higher education giants is still uncertain. Will small, private, non-profit colleges and universities be able to compete and survive? How will local needs be accommodated within this scenario? Are for-profit establishments planning to expand to the rest of Latin America or beyond? How will the government deal with the evaluation and regulation of such big players in the higher education landscape? What will be the effect of lobbying and political activities undertaken by such powerful educational groups? These are some of the many issues now confronting Brazil. The world should keep an eye on what is happening, because the rise of the for-profit higher education sector in Brazil is certainly a harbinger of a worldwide trend. ■

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## Colombia: Challenges of Fast-Paced Change

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“Here, you see, it takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast as that!”

These words from the Queen of Hearts to Alice in *Through the Looking Glass* illustrate what many countries around the world are facing in terms of higher education policies. Changes are coming fast and governments and universities are usually ill suited to adapt quickly. This challenge is particularly difficult for developing countries and Colombia is no exception. Recent proposals from the government are ambitious. Experiences from other countries demonstrate that reforms can take decades; but the tenure of most presidents is brief.

#### THE MOST EDUCATED COUNTRY

Colombia has been a leader in innovative and progressive educational policy. ICETEX, the government's student loans agency, was the first one of its class in the world, and Colombia was among the first in Latin America to establish an accreditation agency. However, Colombia is now struggling to introduce policy to keep pace with the changes in higher education.

President Juan Manuel Santos' National Development Plan (NDP) for 2014–2018 dedicates more attention to education than any previous NDP. In chapter six, titled "Colombia, the Most Educated," the government sets forth its strategy for education. Higher education and research play an important role in the NDP, prioritizing a more fluid interplay between education, research, and the productive sector. This is not a new idea: a fruitful relationship between academia and the productive sector has been elusive for decades.

#### A COHERENT AND INTEGRATED SYSTEM

Santos' NDP is proposing new initiatives toward developing a more coherent tertiary education system, many of which have been implemented successfully in other countries. These include the creation of a national qualification framework; the creation of a system for the accumulation and transferability of [academic] credits; and the creation of a national system for quality.

While the reform of the quality assurance system, which points toward the reorganization of many preexisting structures and processes, may not require much time to be implemented, some of the other components will take many years, or perhaps more than a decade, to materialize.

National qualifications frameworks provide a structure to organize educational levels in terms of their corresponding qualifications, including learning outcomes. These frameworks have proven successful in the regulation of qualifications in education and training in countries such as Australia and Ireland. In Latin America, Chile and Ecuador have embarked in similar projects with mixed results. Experience indicates that this is a long-term enterprise. In other countries, the whole process has taken a couple de-

cadecades to reach successful implementation.

The qualifications framework proposed for Colombia includes all levels and types of education (similar to the Australian model). Currently, the distinctions between the different levels of the higher education system are unclear. For example, the difference between the academic program leading to the degree of "técnico profesional" and the one leading to the degree of "tecnólogo" is not clear to the public, and sometimes not even among experts. Something similar happens with some specializations (graduate-level programs) and master's degree programs. If the qualifications framework helps to define clear distinctions between each type of program while contributing to mobility across them, it will be an important contribution.

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### Santos' NDP is proposing new initiatives toward developing a more coherent tertiary education system.

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The system for the accumulation and transferability of academic credits is another strategy that poses challenges for its prompt implementation. Mexico and Chile recently developed tools for the transferability of academic credits. In Mexico, an initiative by ANUIES (the national association of universities) provided a framework for academic mobility among its university members. Similarly, in Chile, the CRUCH (Council of Rectors of Chilean Universities) created the Transferable Credits System. Not only did both initiatives take years to develop, but they only included those institutions that participated voluntarily, and neither included nonuniversity institutions. Colombia's approach is more ambitious and adds complexity: the system aims to facilitate mobility across different sectors, including non-formal, vocational education and training, as well as universities. Participation is also intended to be compulsory, although this is not yet settled.

The announcement in the NDP of the "creation" of a tertiary education system has caused confusion, particularly because of a broad consensus in Colombia that a higher education system already exists. The differences between the current "higher education system" and the proposed "tertiary education system" are not clear. The ministry of education claims that the purpose of this change is to strengthen the status of technical education in the country by creating two interrelated paths (called pillars) of instruction: the university education pillar and the technical education pillar. The differences and similarities between the two

pillars might be simple to express in theory, but the practical implications of integration have proven more complex.

#### THE POLITICS OF CHANGE

The relevance of most of the strategies and systems that the Colombian NDP proposes is undeniable. Yet, implementation is another matter. Some of the ideas and initiatives will take time—both to mature and develop, and to gain the acceptance of diverse stakeholders. This level of reform is not compatible with a government with only limited time remaining in office, and certainly not with the pace at which academia accepts change. The Santos government is under pressure to set in motion this ambitious reform before 2018 (Santos cannot be reelected again). Yet, the government faces an additional challenge: the minister of education and the vice-minister of higher education who crafted the proposal recently resigned. The new minister has vowed to continue these efforts, but the learning curve is steep and time is running out. Interestingly, the leadership of the project seems to be shifting from the ministry of education to the ministry of labor and the National Learning Service (SENA), a government institution that provides vocational education and training and higher education.

The government will not be able to execute many of the components of the reform without engaging many other stakeholders, including, of course, universities. However, the Santos government has not been successful at communicating the intended reforms, even though some institutions support certain elements of the plan; the full scope and potential impact are just not yet fully understood.

The Santos government has less than two years left. The ministry of education has launched an effort to achieve the goals of the development plan, but this is extremely ambitious for the time remaining. It is time to evaluate what can be achieved in this short period and focus on that. A more ambitious approach may cause the reforms to fail. “Haste is a poor counselor,” said Dumas, or, in the words of the White Rabbit, “the hurrier I go, the behinder I get.”

\*Disclaimer: The opinions appearing in this article are the author’s sole responsibility and do not necessarily reflect those from the World Bank or the ministry of education.

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## NEW PUBLICATIONS FROM CIHE

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Philip Altbach, Liz Reisberg, and Hans de Wit (Eds.). *Responding to Massification, Differentiation in Postsecondary Education Worldwide*, published by the Körber Foundation in Germany in cooperation with the German’s Rectors Conference (HRK) [http://www.bc.edu/content/dam/files/research\\_sites/cihe/pdf/Korber%20bk%20PDF.pdf](http://www.bc.edu/content/dam/files/research_sites/cihe/pdf/Korber%20bk%20PDF.pdf).

Hans de Wit, Jocelyne Gacel-Ávila, Elspeth Jones, and Nico Jooste (Eds.). *The Globalization of Internationalization, Emerging Voices and Perspectives*, published in January 2017 by Routledge. The book includes two coauthored chapters by CIHE Director Hans de Wit, who was also the lead editor for the book. <https://www.routledge.com/The-Globalization-of-Internationalization-Emerging-Voices-and-Perspectives/de-Wit-Gacel-Avila-Jones-Jooste/p/book/9781138100664>.

Maria Yudkevich, Philip G. Altbach, and Laura E. Rumbley (Eds.). *International Faculty in Higher Education: Comparative Perspectives on Recruitment, Integration, and Impact*, December 2016. The book is the latest in a series of scholarly collaborations between CIHE and the National Research University Higher School of Economics, in Moscow. <https://www.routledge.com/International-Faculty-in-Higher-Education-Comparative-Perspectives-on/Yudkevich-Altbach-Rumbley/p/book/9781138685178>.

Georgiana Mihut, Lisa Unangst, Liz Reisberg, and Hans de Wit (Eds.). *The World View: Selected Blogs Published by Inside Higher Education, 2010-2016*. CIHE Perspective 4 brings together a collection of 30 blogs, selected from over 300 such pieces published since 2010 when *The World View* became a regular column in *Inside Higher Education*, edited by Liz Reisberg, Research Fellow at CIHE.